



**Chronic Poverty**  
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## **Policies for interrupting the intergenerational transmission of poverty in developed countries: An annotated bibliography**

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### **What is Chronic Poverty?**

The distinguishing feature of chronic poverty is extended duration in absolute poverty.

Therefore, chronically poor people always, or usually, live below a poverty line, which is normally defined in terms of a money indicator (e.g. consumption, income, etc.), but could also be defined in terms of wider or subjective aspects of deprivation.

This is different from the transitorily poor, who move in and out of poverty, or only occasionally fall below the poverty line.



## Abstract

The purpose of this annotated bibliography is to support the output of CPRC Working Paper 199 (Grant *et al.*, 2009) titled '[Policies for interrupting the intergenerational transmission of poverty in developed countries](#)', which forms part of a thematic body of work being undertaken by the Chronic Poverty Research Centre (CPRC). The paper produces a considerable amount of literature on the topic which has been organised into 3 country contexts: the United Kingdom, the United States and other OECD countries. The fourth section provides references on policy transfer.

The annotated bibliography provides an index at the back – sorted according to author and alphabetical order.

Keywords: intergenerational transmission of poverty, OECD countries, policy transfer

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## 1 United Kingdom

**Akhurst, S., Tunstill, J., Allnock, D., Garbers, C. (2005). 'Sure Start Local Programmes: implications of case study data from the National Evaluation of Sure Start'. *Children & Society*, 19 (2), 158–171.**

This paper is based on case study data on Sure Start Local Programmes collected within the Implementation Module of the Department for Education and Skills-commissioned National Evaluation of Sure Start, between 2002 and 2004. Part 1 describes and discusses some key challenges for programme stakeholders associated with the optimum delivery of services for children and families, including managing partnerships; meeting the needs of a diverse community; and targeting. The research confirms that developing and running a SSLP is a challenging task. One aspect is producing effective multidisciplinary teams. It involves maintaining strategic relationships with mainstream agencies which have their own priorities, and which need to serve the whole community. Programme leadership and management are critical to achieving such effective multidisciplinary teamwork. Another aspect requires establishing and maintaining contact with children and families. Inevitably this involves ensuring that children have access to services by engaging the most important gatekeepers of all: their parents. Boundaries can have an impact on service use however. Age and geography can create significant barriers to service use and mean that many families in need of services are unable to receive help. Part 2 explores the relevance of these findings for future government policy for children and families; and concludes by highlighting the value of an emphasis on 'building knowledge'- underlining the need for a move from a sometimes simplistic rhetoric around 'evidence based policy and practice', to a stress on building knowledge over time. Some encouraging signs of this are present in the Treasury's Ten Year Childcare Strategy (HM Treasury, 2004) that draws upon a wide range of evidence.

Keywords: Sure Start Local Programme, Children, Families, Social services, UK

**Atkinson, A., Collard, S., Kempson, E. (2006). 'Saving for children: A baseline survey at the inception of the Child Trust Fund'. University of Bristol, UK: Personal Finance Research Centre / HMRC. Available at:**  
[http://www.hmrc.gov.uk/research/sfc\\_report\\_df6.pdf](http://www.hmrc.gov.uk/research/sfc_report_df6.pdf)

This research analyses the inception of the Child Trust Fund (CTF), which is a tax-efficient savings 'wrapper' like an ISA, through face-to-face surveys with parents of children, CTF providers and distributors. Government introduced the CTF to promote asset accumulation among young people, passing the Act in May 2004. The research aims to provide baseline information about the extent and nature of savings for and by children under 18 when the CTF became operational (patterns of saving/attitudes towards saving, etc.). The other aim is to consider aspects of the CTF itself. This includes information about CTF accounts, as well as parental choices in opening a CTF account, and the future intentions and expectations of



saving in the CTF account. The likelihood of adding money to a CTF account was closely linked to family size, with a strong desire to treat children equally. Additionally, 56 percent of parents from low income families believed the CTF would encourage them to save more.

Keywords: Child Trust Fund, Savings, Children, UK

**Beale, I., Bloss, C., Thomas, A. (2008). 'The longer term impact of the New Deal for young people'. DWP Working Paper 23. London, UK: Department of Work and Pensions. Available at: <http://www.dwp.gov.uk/asd/asd5/WP23.pdf>**

This paper seeks to analyse the The New Deal for Young People (NDYP) which was introduced during early 1998. The programme is mandatory and provides support for 18 to 24 year olds who have been unemployed and claiming Jobseeker's Allowance (JSA) for six months. The NDYP is the largest government labour market programme with nearly 960,000 clients having started the programme by March 2005. Twelve monthly cohorts of male NDYP starters from July 1999 to June 2000 have been followed for four years to analyse the impact of the programme. The key finding from the analysis is that the positive impact of NDYP on young people lasts for a number of years following participation. Over a four year period, NDYP participants spent, on average, 64 fewer days claiming ALMBs than the comparison group. Although the impact declines over time, this substantial difference suggests that participation on NDYP reduces Active Labour Market Benefit claims by 12 percent. The results suggest that qualifications have a large effect on the likelihood of achieving successful outcomes. Clients' previous claim history and age were also important factors with older clients and clients with shorter previous claims more likely to achieve successful outcomes. Analysis including active and inactive benefits suggests that programme participants spent fewer days claiming benefits than the comparison group. This finding is subject to uncertainty since it has not been possible to control for systematic differences in the proportion of time that both age groups spent claiming inactive benefits prior to the introduction of the NDYP. The programme group spent on average 12 percent of its time on inactive benefits in the fourth year. The findings in this paper are in agreement with Bradley (2004): Employment Option participants perform the best followed by Full-Time Education and Training, the Voluntary Sector and the Environment Task Force participants.

Keywords: Young people, Labour programme, Benefits, UK



**Blanden, J. (2006). 'Bucking the Trend': What enables those who are disadvantaged in childhood to succeed later in life?' DWP Working Paper 31. London, UK: Department of Work and Pensions. Available at: <http://www.dwp.gov.uk/asd/asd5/WP31.pdf>**

This report offers an analysis of some of the factors associated with poor children escaping poverty in later life. The analysis is carried out using data from the British Cohort Study (BCS) of children born in 1970 to estimate a number of models for individuals who faced disadvantage in childhood where the dependent variable is some measure of adult success or 'bucking the trend'. The explanatory variables are drawn from the wealth of information available from questions addressed to the child, their parents and their teachers. Educational attainment is extremely important in determining children's later likelihood of bucking the trend. The role of attainment starts early; with bucking the trend being associated with higher tests scores at 5 years old. One of the aims of the report was to look beyond these results to try and understand why some poor children do better at school than others. The most robust result found is that parental interest in child's education is very important. This implies that parenting interventions such as Sure Start could have an important long-term effect if they encourage parents to become more involved in their children's education. Results indicate that going to primary school with more high ability peers is associated with a higher probability of bucking the trend for boys. There are no robust effects for school social class mix. Results appear to support the case for early interventions as ability scores taken at age 5 are a strong predictor of a child's chance of bucking the trend. In this case, it is crucial to try and understand why some children are more successful than others in early tests, the results presented here suggest that parental engagement is crucial.

Keywords: Children, Poverty, Parents, Education, UK

**Bradshaw, J. (2006). *Child Support*. York, UK: Joseph Rowntree Foundation. Available at: <http://www.jrf.org.uk/bookshop/eBooks/9781859355039.pdf>**

This paper is a review of the potential of child support in the strategy to end child poverty. There are 3 ways child support may have an impact on child poverty: to reduce child poverty (CP) directly by increasing the income of parents with care; to increase CP directly by decreasing the income of non-resident parents; to impact on CP by changing behaviour (of potential resident or non resident parents) in the long term; change incentives to use contraception, find and retain employment and to forming or ending a partnership. When the Labour Government came to power, it set in place a reform of child support with the intention of simplifying the old system. Child support would be based on a simpler formula, there would be a £10 child maintenance premium (disregard) for lone parents on Income Support (IS), and all payments from non-resident parents in employment would be disregarded for tax credit purposes. However the new system has failed to deliver. For this paper the authors have undertaken new analysis of the Family Resources Survey 2003/4 to assess the impact

of maintenance on the child poverty rates of parents with care. In order to do this we have estimated child poverty rates including and excluding maintenance for a child. Only 4.4 percent of couple families and 22.8 percent of lone parent families are receiving any child maintenance. For those receiving child maintenance it reduces child poverty rates by 13.9 percent in lone parent families and 2.5 percent in couple families and 7 percent overall. However this takes no account of the impact on the non-resident fathers' children. One researcher selected 81 cases from CSA administrative records, matched caring parent and non-resident parent and simulated the impact of the old and new scheme on the net incomes of parents with care and non-resident families (McFadden 2004). In conclusion no parents with care on Income Support were lifted out of poverty by the £10 disregard. The existing system to maximise its anti poverty power might make sure that all parents with care know that they can retain all the child support they might receive when they are employed more than 16 hours per week. The £10 disregard in income support cases could be increased or a 100 percent pass through adopted. Whether this makes a contribution to poverty reduction would depend on what proportion of non-resident parents are paying or could pay more than £10 per week; on the relationship between the Income Support scales, what they could pay and the poverty threshold; on the behavioural response of caring parents who might benefit from this and on the impact of non-resident parent's payments on their own families and children.

Keywords: Child support, Poverty, Maintenance premium, Low-income families, UK

**Bradshaw, J. (2006). *How has the child poverty rate and composition changed?* York, UK: Joseph Rowntree Foundation. Available at:**  
<http://www.jrf.org.uk/bookshop/eBooks/9781859355077.pdf>

This note is designed to draw attention to how the pattern of child poverty has changed since the Labour Government started to take an interest in the issue with the Prime Minister's pledge in 1999. The analysis is based entirely on published data – the Households Below Average Incomes analysis by the Department for Work and Pensions. The author notes that as well as increased employment rates and changes in the characteristics of families, changes in child poverty may have been influenced by the introduction of the minimum wage in 1998 and its uprating, particularly in October 2002 and 2003, by more than the rate of inflation. Additionally by the increases in Child Benefit, particularly the increase in child benefit in 2000 which much exceeded movements in prices. Another factor is the replacement of Family Credit by Working Families Tax Credit from October 2001 with a premium for disabled children, a disregard of all Child Support payments from non-resident parents and childcare tax credit. Also changes in child poverty were influenced by the introduction of Child Tax Credit in 2002 and the large increases in 2003 and 2004 and the new Child Support Scheme which began to operate from March 2003, introducing a £10 disregard for parents with care on Income Support. The Research considers changes in poverty rates between 1999/0 and 2004/5 for different groups; it also considers changes in



the composition of child poverty over this period. It does this for both after and before housing costs (a total of four sections.) Results are presented but not analysed.

Keywords: Child poverty, Benefits, Poverty rate, UK

**Brewer, M., Duncan A., Shephard, A., Suárez, M. J. (2005). 'Did Working Families' Tax Credit work?' The final evaluation of the impact of in-work support on parents' labour supply and take-up behaviour in the UK'. London, UK: Institute of Fiscal Studies / Her Majesty Revenue and Customs. Available at:**

<http://www.hmrc.gov.uk/research/ifs-laboursupply.pdf>

With micro data from before and after a major reform in 1999 to the structure and form of in-work transfers in the UK, this paper uses a structural model of labour supply and programme participation to evaluate the labour market impact of Working Families' Tax Credit (WFTC). Estimates suggest that by 2002, WFTC had increased labour supply of lone mothers by around 5.11 percentage points, slightly reduced labour supply of mothers in couples by 0.57 percentage points, and increased the labour supply of fathers in couples by 0.75 percentage points, compared with the benefit that preceded it, called Family Credit. In aggregate, these changes are equivalent to a fall of 99,000 in the number of workless families with children, and a net increase in labour market participation of 81,000 workers. However, other contemporaneous changes to the tax and benefit system affecting families with children acted, on balance, to reduce the labour supply of parents: we estimate that the combined impact of all tax and benefit changes between April 1999 and March 2003 was to increase the labour supply of lone mothers by 3.72 percentage points, and reduce that of men and women in couples by 0.40 and 0.49 percentage points respectively; overall, these correspond to an increase in participation of 22,000 individuals, and a reduction in the number of workless families with children of 43,000. These large differences show the significance of analysing changes to the tax and benefit system as a whole.

Keywords: Working families, Labour market, Tax credit, UK

**Brewer, M., Gregg, P. (2003). 'Eradicating Child Poverty in Britain: welfare reform and children since 1997'. London, UK: Institute of Fiscal Studies. Available at:**

<http://www.ifs.org.uk/wps/wp0108.pdf>

The Researchers consider the initial steps that had been taken towards the Government's 2020 target of eradicating child poverty. They find that while the U.K. Government's strategy contains many of the main elements of U.S. welfare to work agenda—such as increased financial incentives and case management of the welfare caseload to support transition into work—it also has substantial differences. The most striking are the levels of welfare support for those not in work—as well as those in work—are rising substantially. There is no time-limiting of welfare support nor a requirement to seek work for lone mothers (sanctions only





apply to those claiming unemployment benefits who do not meet their responsibilities to look for work and accept appropriate job offers). There is also strong emphasis on tackling poverty and its consequences for children. The Government has substantially raised support for families with children. Increased financial support has been focused on low-income families, whether they are working or not, but all families with children have gained something under the Government's package of reforms. Work incentives have risen, especially for full-time work, and those lifted out of poverty to date are much more likely to be working. Increasing the financial rewards for work at low wages is part of a wider strategy to reduce the number of children living in workless households- which would appear vital if the costs of eliminating childhood poverty are not to prove prohibitive. Here there are some early signs of improvement. There have also been substantial reforms to the way welfare is administered to support transitions into work. The most important is the development of a case management approach, with all claimants having a personal advisor. The final part of the strategy is to reduce the extent to which children from the poorest households and communities do less well in terms of development and education. This involves a mixture of extra resources and focusing the machinery of government and service delivery on out-turns among the poorest children. All elements of this strategy are evolving, and further steps have already been announced or proposed. They conclude that if interventions and reduce financial distress lead to fewer teen pregnancies or people with very low levels of literacy, then fewer parents in the next generation will suffer as acute problems earning and supporting their families. This intergenerational transmission aspect of deprivation is very important in government thinking.

Keywords: Child poverty, Welfare reform, UK

**Collard, S., McKay, S. (2006). 'Closing the Savings gap? The role of the savings gateway'. *Local Economy*, 21 (1), 25–35, February 2006.**

This article overviews the 'rise of asset based welfare policies in the UK' and then goes on to outline the key findings from the evaluation of the first saving gateway pilot. Overall, the results are positive—the scheme has encouraged participants to save, and to save regularly. In addition, it seems to have resulted in positive psychological and attitudinal changes among a significant proportion of participants. There were some differences between demographic groups in the amounts saved: younger people saved less than those aged 30 or over; couples saved more than single people (although the presence of children in a household had little effect); workers saved more than non-workers; owner-occupiers saved more than tenants; and those on the lowest incomes saved least. There was a weak link between having a higher income and saving more. Most participants were able to find the money to save in their Saving Gateway accounts without too much difficulty. Indeed, some reported that they would have saved at least some of this money anyway, but in cash at home rather than in an account. The Saving Gateway also seemed to have other positive effects on participants, some of which were more tangible than others. These included psychological



and attitudinal changes, improved money management skills and longer-term changes in behaviour. By comparing people's attitudes to saving over time, it is possible to see a marked shift in favour of saving among Saving Gateway participants. Participants were also asked whether they intended to continue saving in the future. Four in ten (40 percent) said that they intended to continue to save regularly, and a further five in ten (47 percent) said they would save as and when they could. Only six percent did not intend to save at all, although a similar proportion was unable to say. Three or more months after maturity, more than nine in ten Saving Gateway participants (91 percent) still had a savings account of some kind and four in ten participants (41 percent) were still saving fairly regularly. Only a minority of people (9 percent) no longer had any money in a savings account, having drawn out the money saved in the Saving Gateway and put nothing into a savings account since.

Keywords: Savings, Saving Gateway, Welfare policies, UK

**Corker, M., Davis, J., Shakespeare, T., Watson, N. (2005). 'Reconstructing disability, childhood and social policy in the UK'. In Hendrick, H. (2005) *Child welfare and social policy*, 323-339. Bristol, UK: The Policy Press.**

The authors examine the views and policies on disabled children and the children's perspective. They underline the importance of a full analysis into the circumstances in which the disabled children grow up and how their lives are conditioned by their surrounding. There has been very little recognition of the experience of children within the model analysing social relations and structural exclusion, so-called 'social model'. The change and shift in social policy towards disabled children's lives is examined through children 5-16 Programme Project: 'Life as a Disabled Child' introduced through New Community Schools in Scotland and The Children's Fund in England. Often disabled children exclusion is seen as a consequence of lack of financial resources and the poor quality of services provided by authorities. However, the structural explanations fail to investigate the cultural context. The financial status allows only certain degree of independence. Many children suggested that their lives varied depending on the people they were surrounded by and their willingness and ability to communicate with them – example of deaf children. A case of an Asian family shows the complexity of analysing not only disability but also ethnicity and their relationship. Another problem comes with 'overprotective' policies towards children to protect adults against the fear of litigation. The children's opinions are not taken into consideration. Deaf children often felt that their capacities were underestimated and there was also a separation between adults and children. The separations were also noticed between children of different ethnicities and disabled and non-disabled children. The examples of Deaf Asian children provided a case for studying deeper cultural divisions. 'Real' educational inclusion does not depend only on structural changes but depends also on equal access to educational opportunities, equitable group dynamics and presence of strong-willed pupils, parents and staff. The solution lies in developing social policy that promotes negotiation between adults



and children and recognizes their abilities and encourages families and service providers to develop their own localised solutions.

Keywords: Disabled children, Social policy, UK

**Department for Children, Schools and Families (DCSF) (2008). 'Sure Start Children's Centres, building brighter futures'. London, UK: DCSF. Available at:**

<http://publications.teachernet.gov.uk/eOrderingDownload/DCSF-00185-2008.pdf>

An overview of the Sure Start children's centres, and their role in the Government's children's plan. Sure Start Children's Centres provide services for families including health and family support services, integrated early learning and fullday or sessional care for children from 0–5 years, and advice and information for parents on a range of issues from effective parenting to training and employment opportunities. Better, more accessible services for all – but with more resources targeted at those who need it most. By 2010 every community will be served by a Sure Start Children's Centre, offering permanent universal provision across the country to ensure that every child gets the best start in life.

Keywords: Sure Start, Children, UK

**Department for Children, Schools and Families (DCSF) (2008). 'The Sure Start journey: a summary of evidence'. London, UK: DCSF. Available at:**

[http://publications.teachernet.gov.uk/eOrderingDownload/FINAL\\_percent20The\\_percent20Sure\\_percent20Start\\_percent20Journey.pdf](http://publications.teachernet.gov.uk/eOrderingDownload/FINAL_percent20The_percent20Sure_percent20Start_percent20Journey.pdf)

This report provides a summary of the main headlines from the Sure Start research programme, together with findings from other key reports and evaluations, structured around high level policy themes. As such, it highlights the emerging success stories and key challenges. Overall there is widespread support for the philosophy of Sure Start. NESS data has revealed a high level of satisfaction and enthusiasm on the part of parents who lived in Sure Start Local Programme (SSLP) areas and who had come into contact with the SSLP. There is a high level of interaction between Sure Start and other Government initiatives. SSLPs that were proficient in implementing and delivering their programmes were more able to have positive effects on the children and families living in their areas. There is strong evidence that good progress is being made towards developing the kinds of services parents want and need. Programme managers felt the flexibility of Sure Start was a key element in the successful delivery of the programme. Amongst the NESS research there is evidence of SSLPs that have developed some exemplary services, and have made incremental improvements to many services. The targeting of Sure Start Local Programmes has been effective in that they can be found in areas that are home to many of the poorest children aged 0 to 3 years and their families in England. According to Ofsted the majority of settings provided good or better services, integrating care and education very effectively. Almost all



the sample were effective in meeting the range of needs of children, young people and adults in the local community. Some challenges included the need to monitor performance and to feedback on progress. It has taken longer than expected for Sure Start programmes to develop their full range of services. It is challenging and time consuming to join-up and work in partnership with other agencies and providers. Sure Start programmes operate in extremely complex areas where many other initiatives operate and this exacerbates the issues around collaborative working for most programmes. There is a need for centres to improve work with families and children to enrich the language development of children. This work needs to be from birth onwards and all staff and parents need to be aware of the need for frequent language stimulation for all children.

Keywords: Sure Start, Children, UK

**Department for Children, Schools and Families (DCSF) (2006). 'Social Mobility: Narrowing Social Class Educational Attainment Gaps', Supporting Materials to a speech by the Rt. Hon Ruth Kelly MP Secretary of State for Education and Skills to the Institute for Public Policy Research. London, UK: DCSF. Available at:**  
<http://www.dcsf.gov.uk/rsgateway/DB/STA/t000657/SocialMobility26Apr06.pdf>

This slide pack follows on from Ruth Kelly's speech to the Institute for Public Policy Research on Social Mobility in July 2005. Parts A to C extend the earlier analysis of the nature of the social class attainment gap at Key Stage 2, to cover all Key Stages and beyond. It also considers how these gaps have changed over time, and identifies the drivers of the gap

Part D of this work looks at the Department's policies across different age ranges and considers what contribution they may be making to narrowing the social class attainment gap. The document contains a wide range of potentially important information for this study, it includes the following summary of drivers of the educational attainment gap. Social class attainment gaps are a product of a pupils' family background (and other social factors), their individual characteristics and educational factors. The weight of evidence suggests that the former two groups of factors are the most significant drivers of attainment gaps. A range of family characteristics appear to matter, with parental expectations and involvement in the child's education being particularly critical. However, there are limits on the extent to which government can directly affect these factors through policy interventions. An individual's prior attainment has a very significant impact on later attainment. However it is also the case that pupils receiving FSM fall back at each stage of education for a given level of attainment. This compounding of gaps across the education lifecycle suggests that both early intervention and sustained support is very important. A pupil's individual characteristics – for example, educational needs or ethnicity – can also help explain attainment gaps. Understanding what works to address these is important to inform how we should intervene to improve social class attainment gaps. There is evidence that particular educational interventions can have a positive impact, for example school resources, school type, curriculum, classroom



organisation and policies that focus on the basics. School types and ‘whole-school’ interventions may have some impact on reducing the gap. New analysis of schools’ progress taking into account prior attainment and other pupil characteristics, suggests that more deprived pupils in some schools make more progress than their equivalents in other schools (although it does not prove a casual link). Post-16, there are benefits to gaining Level 2 qualifications for individuals who leave school without any qualification, both in terms of future earnings and employment rates.

Keywords: Social class, Attainment gap, Children, Education, UK

**Department for Children, Schools and Families (DCSF) (2004). ‘Working together: a sure start guide to the childcare and early education field’. London, UK: DCSF. Available at:**

<http://publications.teachernet.gov.uk/eOrderingDownload/SSWT0304PDF.pdf>

This is a guide to support those working to improve childcare and early years education services in a range of settings. The aim is to make sure agencies are aware of each other’s role, to highlight common objectives. Additionally to enable identification of areas where work overlaps with other agencies and stimulate ideas on how to interact with other agencies to reach aims, objectives and targets. Also to add value to the service provided to clients and enable information to be more easily disseminated – to clients, between colleagues and to other agencies. Finally, it supports the development of networks for future collaboration.

Keywords: Childcare, Early education, UK

**Ellison, N., Ellison, S. (2006). ‘Creating ‘Opportunity for All’? New Labour, New Localism and the Opportunity Society’. *Social Policy & Society*, 5 (3), 337–348.**

This article asks if the kind of social policies New Labour has devised can deliver ‘opportunity for all’. It considers Labour’s local regeneration initiatives as an example. The authors find the real difficulty concerns the current social policy mix and, specifically, the apparent belief that targeted policies alone can lead to a much wider condition of social inclusion and the ‘opportunity society’. Although a ‘strategy’ of this kind can certainly produce benefits for (some) disadvantaged groups in (some) areas, it is hard to see how it can lead to genuine opportunity for all in the absence of a stronger commitment to redistributive justice of the kind the government appears reluctant to endorse. If they are allowed to retain the fruits of very high earnings and permitted to accumulate and retain large concentrations of wealth, better-off groups will always enjoy greater opportunities than poorer sections of society, thereby negating any chance of establishing more equal access to opportunities overall. To ignore the logic of stated principle opens up the risk that policy could become merely pragmatic. If ‘third way’ social policies have always had a necessary hint of pragmatism about them, this makes it all the more important that consistent critical engagement with the policy–public



philosophy relationship keeps them attached to principle. To escape principle completely obviously reduces the power and scope of socio-political vision, and means policies will increasingly be justified on the narrowly conceived basis of 'what works'.

Keywords: New Labour, Opportunity for all, Social inclusion, UK

**Emmerson, C., Wakefield, M. (2003). 'Increasing Support for Those on Lower Incomes: Is the Saving Gateway the Best Policy Response?' *Fiscal Studies*, 24 (2), 167–195.**

This paper describes possible rationales for government intervention to introduce a savings account for people on lower incomes, which will provide a strong incentive for eligible individuals to save, or at least to hold financial assets, in these accounts. It then presents new evidence on the characteristics of people with lower incomes and finds that many already have some financial assets, while those who do not often appear to have good reasons for why they may not want to be currently saving. The author considers that the result of this is that the proposed Saving Gateway will be extremely difficult to target at those who might benefit in the way the government hopes. The danger is that the policy will be expensive relative to the number of genuine new savers and savings that it generates.

Keywords: Savings account, Low income people, UK

**Ermisch, J., Francesconi, M., Pevalin, D., J. (2001). 'Outcomes for children of poverty'. DWP Research Report 158. London, UK: Department for Work and Pensions. Available at: <http://www.dwp.gov.uk/asd/asd5/rrep158.pdf>**

This research project is based on the first nine waves of the British Household Panel Survey (BHPS), 1991-1999 and considers the 'outcomes for children of poverty'. The households tracked by the BHPS have been interviewed annually since 1991, and the adolescents and young adults that are the focus of this study were born between 1979 and 1988 and between 1970 and 1983, respectively. The authors consider the findings of both the adolescent and young adult samples. Policy programmes that are aimed at families with adolescents are likely to produce different results from programmes aimed at supporting children in their early school years. Income support programmes targeting families with adolescents may be successful in improving the adolescents' educational prospects and labour market involvement. But they may not necessarily reduce their risks of early childbearing. For this outcome, earlier interventions seem to be more appropriate. Parents' income or non-employment patterns, the age of parents when the child was born, education and family structure all have an impact on children's chances of success, which is another crucial finding of this study. This means that family policies and income maintenance programmes are not mutually exclusive and are both likely to be relevant. In particular, the fact that parent absence still matters after taking poverty into account does not imply that policy makers should not try to minimise the economic distress of single mothers. Reducing poverty might





also mitigate some other negative effects of living in a family that does not provide a sufficiently stimulating environment for children (e.g., through lower expectations or poorer motivations). If these families were more economically secure, they might be able to buy better and more expensive goods and services needed by their children to accumulate higher human capital. The results from this report and other recent results obtained from analyses of BHPS data suggest that special attention should be given to the timing of interventions over the entire childhood. Poverty during adolescence (ages 11-15) seems to affect some crucial expectations and attitudes toward school and health, household formation and the risks of unemployment and early childbearing. Poverty and having a single parent during school years (ages 6-10) tend to affect educational achievement, although the effect of poverty is substantially reduced when we use estimates based on sibling differences. Poverty and family structure during early childhood (ages 0-5) seem to have strong effects on educational attainment, and, particularly, economic inactivity and early childbearing. Children of poverty are likely to experience not only a loss of resources while growing up, but also (and in part as a consequence of such a loss) lower opportunities for success through intergenerational transmission of disadvantage. The clearest example emerges perhaps with our evidence of intergenerational recurrence of early motherhood. It is hard to believe that the intergenerational transmission of poverty can be entirely rectified by income-maintenance or support programmes, which are probably most effective when aimed at improving short-term problems. Long-term intergenerational issues are perhaps better addressed with long-term interventions, such as education programmes for both the young and the old.

Keywords: Adolescents, Young adults, Children, Poverty, UK

**Evans, M., Scarborough, J. (2006). *Can current policy end child poverty in Britain by 2020?* York, UK: Joseph Rowntree Foundation. Available at:**  
<http://www.jrf.org.uk/bookshop/eBooks/9781859354964.pdf>

The Researchers give an overview of how current policies will continue to work towards the 2020 child poverty targets, and what new policy approaches they believe will be needed. They also consider how measuring poverty affects policy outcomes. By unpicking the current policy commitment to abolish child poverty by 2020 they aim to show, through relatively simple extrapolations of current policy, where the threats and opportunities to succeed are. Current attitudes to uprating mean that those families with children shown most at risk of poverty, those relying on out of work means-tested support, will benefit from continued uprating of child tax credit by earnings even though their underlying out-of-work benefit will only rise with prices. But the combination of this differential uprating means that out-of-work incomes for families with children will tend to rise ahead of prices, and thus over time the *absolute* poverty gap will close, with no change of policy. However, if the Government wants to join together a strategy based on employment opportunities and poverty reduction, then the contemporary relative median poverty line must be considered instead. There is a



problem with per capita levels of support for families. The larger the family the less in equivalised terms it received to help it against child poverty. Today's parents have to work harder or work smarter (up-skill) to ensure their incomes rise sufficiently to keep their poverty clearance levels. Working harder is a problem because the current system has developed a cumulative set of tax and benefit withdrawal rates that cumulate to very high effective marginal tax rates. These were highest – 96 percent in the pound – for those who received housing and council tax benefits alongside tax credits. The alternative to working harder is working smarter – or up-skilling. This paper illustrated potential gains to earnings profiles from better job matching and a more skill-based employment service strategy. The potential of policy to be both more mandatory in its approach to job entry and to be more punitive in sanctions could lead to larger poverty gaps when out of work. The risk of child poverty after separation is acute, especially for low earners. The ability to retain employment is important. Maintenance too makes a potentially significant impact on child poverty for low paid families. The authors conclude that policy is in a much better place to eradicate CP than it was five or ten years ago, but there are still things that have to be seriously considered to make sure that fiscal support through taxes and benefits can support and be supported by other areas of policy.

Keywords: Child poverty, Uprating, Child tax credit, Up-skilling, UK

**Feinstein, L., Duckworth, K., Sabates, R. (2004). 'A model of the intergenerational transmission of educational success'. London, UK: Wider Benefits of Learning Research Report. Available at:**

<http://www.learningbenefits.net/Publications/ResReps/ResRep10.pdf>

The report examines the intergenerational transmission of educational success in the UK. It focuses on the parents' education effect on their children educational outcomes. According to the authors there are four key channels for children's educational effects. Among them are proximal family processes, which follow from parents' behaviours and their educational style. Another important factor is the context of neighbourhood and school where children pass their time. The family characteristics are of great importance, including cognitions and parental mental health, well being. The final factor combines family income and size. Parents' education is an important factor positively affecting the other factors. The authors underline the necessity for longitudinal studies and instrumental variable approach to identify casual effects. The authors also discuss the potential benefits of parenting programmes (DfES) and conclude the limitation of the programmes and the necessity to engage directly with parents, taking into the consideration the overall context and family situation. The authors stress the importance of involvement of various Departments in the strengthening of interacting features within the model of intergenerational transmission of educational success.

Keywords: Transmission of educational success, Parental education, UK





**Gregg, P., Harkness, S., Macmillan, L. (2006). *Welfare to work policies and child poverty: a review of issues relating to the labour market and economy*. York, UK: Joseph Rowntree Foundation. Available at:**  
<http://www.jrf.org.uk/bookshop/eBooks/9781859355107.pdf>

This research aims to assess the potential for labour market, employment and welfare to work policies to support the goal of reducing child poverty in the UK. In particular, it focuses on the potential for increasing lone parents' employment. North American evaluatory evidence on what aspects of programmes designed to aid welfare claimants' return to work have been successful. Schemes which combine work incentives with additional support/conditions for required activities have proved more successful. Second, programmes that have not used financial incentives as a major lever for return to work can raise employment, but those which emphasise entry to work outperform those which emphasise skills/training/education. Within the Work First programmes Portland, which focused on matching clients with higher paid jobs, saw fewer job entries but substantially higher earnings and persistence in job holding.

There has been a long running debate over the value of Work First strategies that ignore improving skills and job quality and the education/training route. The latest and longer-term evidence still firmly says that work is the best first destination at raising earned income for lone parents rather than education based strategies. However, low job quality and low job retention (often related to low job quality) do undermine the potential gains for lone parents from working. The UK welfare to work strategy is firmly Work First and has systematically failed to address job retention and earnings progression. The first section concludes by looking at evidence for programmes to support job retention and earnings advancement in the US. The evidence here remains largely depressingly inconclusive; no tried and tested strategy is yet available. Childcare subsidies for low earning lone mothers are an effective welfare to work policy, probably as effective as other incentive measures. Increased employment among lone parents only benefits children where incomes rise. The income effects on young children's development are substantively positive and are shown experimentally. In the UK the welfare to work policy documents the staggering rise in employment among lone mothers, from 42 percent in 1992 to 56 percent in 2005. The available research suggests that policy reform between 1999 and 2002, which include the Working Families Tax Credit and the New Deal for Lone Parents, was responsible for around 5 points of that 14 point rise. Evidence based on flows into and out of work suggests that around another 3 percentage points will be added to lone parents' employment as a result of recent policy changes. Our study suggests that lone parent employment should reach 65 percent by the end of 2010. To go beyond that, will require three additional steps; rolling out the New Deal plus for lone parents, a series of area focused measures to tackle the weak employment of lone parents in London, and measures to raise job retention.

Keywords: Welfare to work, Reducing poverty, Lone mothers, UK, US



**Gregg, P., Waldfogel, J., Washbrook, E. (2006). 'Tackling child poverty in the UK: are low-income families with children starting to catch up?' *Labour Economics*, 13 (6), 721-746.**

This paper provides evidence on how the UK government's welfare reforms since 1998 have affected the material well-being of children in low-income families. Changes in expenditure patterns and ownership of durable goods for low- and higher-income families between the pre-reform period (1995-1998) and the post-reform period (2000-2003) are examined, using data from the Family Expenditure Survey. Low-income families with children are catching up to more affluent families, in their expenditures and their possession of durable goods. Expenditures on child-related items are increasing faster than expenditures on other items.

Keywords: Welfare reforms, Children, Low-income families, UK

**Hall, S., Pettigrew, N. (2008). 'Exploring the key influences on the Tax Credits claimants population'. Ipsos MORI / Her Majesty Revenue and Customs. Available at: <http://www.hmrc.gov.uk/research/report-49-final.pdf>**

The authors consider the different factors which affect claimants of Tax Credits (TC). This qualitative research involved four pilot face to face interviews to develop the discussion guide, followed by 70 face to face, in depth interviews, 49 with single claimants and 21 with couples. It was often the least financially confident, out of work, or lone parents who had least awareness and understanding of the tax credits system. Tax Credits were different from other forms of state support in that they didn't have any associated stigma. Satisfaction with the system was affected by the extent claimants felt it made an impact on their household finances, whether they had experienced any problems, and the extent to which they were aware of the issue of overpayments. For Lone Parents, disabled people, or people with a disabled partner, tax credits often made a fundamental difference to the way they lived their lives. For instance, money was spent on childcare which enabled people to return to work. For others, tax credits influenced what they were able to afford over an above day to day expenditure. These recipients were often on higher incomes and therefore in receipt of lower awards. Often tax credits made a significant though not life changing impact. Helped to cover day to day costs and without them claimants perceived they would have to cut back on other areas of expenditure. There were some who thought TCs made little or no difference. They were usually on relatively high salaries. Tax Credits were found to have an impact on decision making with regard to employment and childcare. For some, Tax Credits provided the financial impetus they needed to return to work. However, decisions around childcare were also tied into personal beliefs about the best way to bring up children. There were some who believed that even though TCs enabled them to afford child care, the child's best interests were best served by being at home during the formative years.

Keywords: Tax credits, Lone parents, UK



**Hendrick, H. (2005). 'Introduction'. In Hendrick, H., (ed.) *Child welfare and social policy*, 1-7. Bristol, UK: The Policy Press**

This chapter explores assumptions about relationships between parents, children and the state. The author examines the notion of parental authority and its social implications for the children and the state involvement in the family life. An important question is being raised regarding the debate about the services that state should provide to families and the degree in which it should be involved in the prevention of unwanted parental behaviours. There are circumstances in which it is seen as legitimate for the state to intervene and modify or even replace their parenting. According to Fox Harding (91) there are four distinct value positions in the state approach to intervene between the parents and children: laissez-faire, state paternalism, parents' rights, and children's rights. The author analyses the views in which children are expected to obey parents or authority because of the assumptions that children are developmentally immature and need to be dependent. They may also be seen as representing a threat or source of disorder. More recently there has been an emphasis on working with children's family networks and taking into account the wishes and views of children. The assumption that if the State intervenes it is in the 'best interest' of the child should be re-examined. However, in many situations the 'best interest' is ambiguous and there is a need for administrative and legal standards that limit interventions. There should be determined rules in complex situations. Eekelar and Dingwall (1990) argues that there is a need to reconcile the 'best interest principle' with children's rights to self-determination. In his opinion child's wishes should be a significant factor in adult's decision. The emphasis should be on acknowledging the wishes and feeling of child and giving them due consideration having regard to child's age and understanding.

Keywords: Parents, Children, State involvement, UK

**Her Majesty Treasury / Her Majesty Revenue and Customs (2008). 'The saving gateway: operating a national scheme'. London, UK: HMT/HMRC. Available at: [http://www.hm-treasury.gov.uk/media/D/4/bud08\\_saving\\_340.pdf](http://www.hm-treasury.gov.uk/media/D/4/bud08_saving_340.pdf)**

This consultation document outlines proposals for how the administration and operation of the saving gateway pilots (which took place between 2002 and 2007) will be expanded into a national scheme (the first accounts will be available in 2010). The Saving Gateway is a cash saving account for those on lower incomes. It provides an incentive to save, through the Government matching (a contribution for each pound saved) money, which people save into the scheme. Access to the national scheme will be 'passported' from qualifying benefits and tax credits. As with other saving schemes the accounts will be provided by financial institutions such as banks and building societies. The Government is also looking at ways to provide support and information on the Saving Gateway through intermediaries. To indicate that an individual is entitled to hold a Saving Gateway account the Government proposes to automatically send a voucher or unique reference number to eligible individuals. An



individual would then need to approach a Saving Gateway provider to open an account. The government proposes that it would not be mandatory for providers to collect vouchers from individuals in order to open an account. The results for first pilot indicated that that the scheme led to a change in saving behaviour with 41 percent of savers still saving three or more months after the pilot finished and 32 percent of savers saying that they were more likely to plan for retirement. The scheme also encouraged a conversion of informal saving.

Second pilot findings:

- individuals were overwhelmingly positive about the effect of matching as a simple and easily understood incentive to save
- it was not necessary to offer match rates as generous as pound-for-pound in order to incentivise people to save
- there are benefits in having an account structure for regular savings – monthly contribution limits of £25 per month were affordable for those on lower incomes, those on higher incomes were able to save more
- a time-limited account kick-started a saving habit among those new to saving
- the pilots led to new saving particularly among those on lower incomes
- those living closer to a Halifax branch were more likely to open an account than those who lived further away
- savers learnt through ‘learning-by-doing’ and welcomed support and guidance at account opening and maturity.
- there were financial inclusion benefits from extending a structured matched savings account to people on lower incomes. Many of these benefits are around formalising informal savings, promoting regular saving and getting people to engage with financial institutions for the first time.

Keywords: Savings account, Lower income individuals, UK

**Her Majesty Treasury /Inland Revenue (2003). ‘Detailed proposals for the Child Trust Fund’.** London, UK: HMT/IR. Available at:

[http://www.hm-treasury.gov.uk/media/8/1/child\\_trust\\_fund\\_proposals\\_284.pdf](http://www.hm-treasury.gov.uk/media/8/1/child_trust_fund_proposals_284.pdf)

This paper outlines the proposals for the Child Trust Fund (CTF). The introduction to the paper states that it is founded on three core welfare principles. The Government is committed to an active welfare strategy that is founded on the principles of security, opportunity and responsibility. This framework underpins the proposals for the CTF. The paper summarises the Key features of the CTF.



- Savings or investment account is set up with initial Government endowment and is available from April 2005 to children born from 1 September 2002.
- It is based on entitlement to child benefit.
- The endowment is in the amount of £250 for all with additional £250 for children in families on Child Tax Credit (CTC) and income below the CTC threshold (currently £13,230). Parents, families, friends and the child themselves will be able to contribute up to £1,200 a year between them.
- The funds not accessible until age 18.
- Accounts will be offered by financial service providers approved by the Inland Revenue (ISA model).
- Accounts can be moved between providers at any time.
- Providers will issue annual statements to children with CTF accounts.
- All income and gains exempt from personal tax – as for ISAs.

Keywords: Child Trust Fund, Child Tax Credit, Saving account, UK

**Her Majesty Treasury (2001). 'Delivering savings and assets: The modernisation of Britain's tax and benefit system'. London, UK: HMT. Available at:**  
[http://www.hm-treasury.gov.uk/media/C/2/delivering\\_savings.pdf](http://www.hm-treasury.gov.uk/media/C/2/delivering_savings.pdf)

This document outlines the thinking and proposals (as they were in 2001) for the saving gateway and child trust fund to extend the benefits of saving and asset ownership more widely. The introduction also overviews the Government's strategy for saving. The strategy is to create the right environment for saving, including a stable macro-economy, employment opportunity for all, and a well regulated and efficient market in financial services. Additionally to create the right incentives for people to save, including a tax and benefit system which supports, rather than penalises, savers. Finally, to provide clear, impartial information and education towards greater financial literacy to support people in making the right saving choices for themselves. Chapter 5 also considers the need for the integration of *financial education* into both initiatives.

Keywords: Savings, Child trust fund, UK



**Hill, M., Tisdall, K. (2005). 'Children and health'. In Hendrick, H., (ed.) *Child welfare and social policy*, 301-323. Bristol, UK: The Policy Press**

The chapter analyses the UK children's health problems and their understanding of illness as well as the role of parents, society and the state in the representation and treatment of health issues among children. Main health problems among children include eating, drinking, smoking, drug-taking lack of exercise and sexual activity. According to the authors it is necessary to recognize that the definition of health combines not only the absence of illness but also positive health including mental, psychological and physical health. It is necessary to recognize the interrelationships between health, emotions, lifestyles, cultures and social structures as well. Also the relationship between disability and health needs to be considered. The chapter shows various attitudes of children towards health and their understanding of health issues, which depends on their age. It is often assumed that children with serious illness should not be kept informed about the nature and course of their illness. However, studies have shown that ill children feel less stressed when they gain understanding of the diagnosis. Comprehension increases with age, but even more it is affected by the access to information and their transmission. Health risks among children include common conditions such as allergies, headaches, skin complaints, chest problems and asthma. Several health risks and death risks derive from behaviour and 'lifestyle' such as smoking and drug-taking. Risk-taking attitude such as drug-taking or engaging in unsafe sex is often associated with unwanted negative health consequences. Many forms of ill health are represented in the low-income families, with the studies documenting that deprivation is a major contributor to ill-health. Schools and media have an important role in spreading the health messages. Overall, health policy and services have usually given the parents the right to decide for their children's health.

Keywords: Children, Health problems, UK

**Hobcraft, J. (1998). 'Intergenerational and life-course transmission of social exclusion: influences of childhood poverty, family disruption and contact with the police' London, UK: Centre for Analysis of Social Exclusion. Available at: <http://sticerd.lse.ac.uk/dps/case/cp/paper15.pdf>**

This study uses data from the National Child Development Study to examine how experiences during childhood are linked to a wide variety of outcomes in adulthood. A cluster of childhood experiences (poverty, family disruption, and contact with the police) are given specific attention. One of the main goals is to examine the extent to which social exclusion and disadvantage is transmitted across generations and across the life-course. Preliminary analysis of the focal variables highlights powerful interconnections in experiences by age 16. It is found that 44 percent of the poorest boys had contact with the police by age 16 and that 47 percent of children with divorced lone-parents experienced childhood poverty. Frequent life-course and intergenerational continuities in the transmission of social exclusion. Anxious





children experience more malaise as adults. Poor children have lower income as adults. Additionally, parental interest in schooling is powerful predictor of educational success. Social and parental factors (parental interest in schooling and family disruption) are more related to adult exclusion for females and external and structural factors (social class and housing tenure) more related to exclusion for male.

Family disruption is most clearly related to demographic outcomes:

- Children born out-of-wedlock more than twice as likely to have extra-marital births. Boys with step-parents nearly three times as likely to be homeless between 23 & 33.
- Care/ fostering has a devastating effect on most adult outcomes for females

Educational test scores are powerful predictors of a wide range of adult outcomes:

- A three-fold difference in the incidence of early parenthood
- A doubling of malaise
- A three-fold difference in social housing
- A four-fold difference in low male earnings

The importance of father's interest in schooling for both sexes, with mother's interest proving more important for girls. The five most powerful and consistent childhood predictors of adult outcomes include all three of the focal variables (childhood poverty, family disruption, and contact with the police), along with educational test scores and father's interest in schooling.

Keywords: Childhood experience, Adulthood outcomes, UK

**Ireland, E., Golden, S., Morris, M. (2006). 'Evaluation of integrated AimHigher: Tracking surveys of young people'. London, UK: Department for Education and Skills, Research report. Available at:**

<http://www.dcsf.gov.uk/research/data/uploadfiles/RR811.pdf>

The integrated Aimhigher programme was established in 2004 as 'a national programme which aims to widen participation in higher education by raising the aspirations and developing the abilities of young people from underrepresented groups'. This Research based on follow-up questionnaire surveys of 1,222 young people in Spring 2005. These young people had previously been surveyed between one and three years ago when they were in Year 11 and attended schools that were participating in Excellence Challenge. The sample of young people had agreed to a follow-up survey when they were in Year 11 and had provided their contact details. The research found that the majority of young people surveyed across the three cohorts had made a successful transition at 16 and were content with their choices. In addition, while some young people made a definite choice not to



participate in higher education, around three-fifths of those aged 16 to 17 and 17 to 18 planned to undertake a higher education course in future. Two-fifths of those aged 18 to 19 had embarked on a higher education course and a further 16 percent planned to do so in future. There were indications that particular Aimhigher-related activities were associated with positive attitudes towards higher education and a positive intention or decision to enter higher education. The findings suggest that, of the range of activities, visits to higher education institutions, discussions with staff and current undergraduates in higher education and participation in an Aimhigher Roadshow and week-long summer school may be the most effective activities as they were associated most strongly with young people's intentions and attitudes. Family and friends continued to be widely consulted and this highlights the central role of such individuals in informing young people's choices. The financial considerations involved in undertaking a higher education course emerged as one of the main areas of concern for respondents in all cohorts and as an area on which they would like further information. Moreover, a minority of young people who were participating in higher education said that they found it hard to manage their finances. Overall, it appears that ensuring that young people are fully informed about the costs of higher education, sources of financial support, and budget management could be key priority areas for Aimhigher partnerships.

Keywords: Aimhigher, Higher education, Young people, UK

**Jenkins, S., P., Rigg, J., A., Devicienti, F. (2001). 'The dynamics of Poverty in Britain'.  
DWP Research Report 157. London, UK: Department for Work and Pensions.  
Available at: <http://www.dwp.gov.uk/asd/asd5/rrep157.pdf>**

This report analyses the dynamics of poverty using data from the first nine waves (1991-9) of the British Household Panel Survey (BHPS). It describes the extent and nature of persistent poverty in Britain, the main events ('routes') associated with movements into and out of poverty, and the length of poverty spells and the time between poverty spells. There is a lot of movement into and out of poverty over a period of time – there is poverty spell repetition. Having an above average persistent poverty rate was associated with being a child or a pensioner, a female adult rather a male adult, an individual living in a lone parent family, or an individual living in a non-pensioner workless family. Changes in a household's labour earnings accounted for the largest shares of exits from poverty as well as of entries to poverty (62 percent and 44 percent respectively, for all persons combined). There was a diversity of routes into and out of poverty nonetheless. The association between trigger events and entries to and exits from persistent poverty was also examined. The change in focus from current to persistent poverty led to a universal reduction in poverty transition rates, conditional and overall – which is not surprising – whereas event prevalence rates remained much the same. By construction, then, the share statistics were very much the same for corresponding events. Most people entering a poverty spell could expect to be poor for only a short time, but there was a significant minority with long spells. Almost one half (46 percent) were estimated to have left poverty after one year, but more than one tenth (12





percent) remained poor for at least five years. Of those people who moved out of poverty, most did not fall back into poverty again for a long time, but a notable fraction did so quickly. The authors found that 40 percent of those who moved out of poverty, stayed out for at least five years, but 30 percent were poor again after just one year. Of all the individuals who fell into poverty, most of those in working-age couple households had relatively short poverty spells. Relatively long spells were experienced by lone parents and their children, and pensioners. Among those who finished a poverty spell, lone parents and their children stood out as a group that became poor again relatively quickly. The findings draw attention to the relative importance of the labour market providing a route out of poverty for individuals of working age. That the general emphasis of the current Government's policy initiatives for individuals of working age is on the labour market is consistent with findings. The research also suggests that an anti-poverty policy based around labour market measures is not sufficient to help many members of society. The Minimum Income Guarantee and extra assistance with child care costs provided in the Working Families' Tax Credit are steps in this direction. Findings about prevalence of repeat poverty spells underlines that it is not only increases in the poverty exits that are required to reduce poverty (the emphasis of current policy), but also reductions in the poverty entry rate – for example measures promoting job retention, not just those promoting employment. The fact that the chances of leaving poverty fall the longer you have been poor, and the chances of falling back in decline the longer you have stayed out of poverty underlines the value of early identification of those people that are likely to have long poverty spells and short recurrence times. Without early intervention, the problem to be addressed gets harder.

Keywords: Dynamics of poverty, Poverty spells, UK

**Leach, P. (2005). 'Daycare: dreams and nightmares'. In Hendrick, H. (ed.) *Child welfare and social policy*, 421-443. Bristol, UK: The Policy Press**

With the post-war changes in family structures and mothers participating more widely in the job market, western policy makers have turned to daycare without asking how best can children's needs be met in modern socio-economic circumstances. The author suggests that daycares are not the best resolution to provide good quality care for the youngest children and often mothers feel very uncomfortable having to leave their children behind. The idea that daycare would fulfil most parents' ideals is premature and comes mainly from media reports and government agendas, it provides for the economies of scales and jobs for the ones operating them. It is more expensive for governments, when parent stay at home. The belief often is that it is better to work and spend your money on child than not to work and spend more time with your children. The author suggests that for the smallest children daycare is not the best place, especially because of the limited resources and small ratio of adults to children. Furthermore the educational experience of daycare is beneficial for the children older than three and not for the babies. The care for infants needs to be permanent, continuous and parent like. In most countries the majority of daycare centres for infants are



not excellent, the workers are underpaid and undervalued. Babies and toddlers need individual care, consistently given by the same known and loving adults. The only possible arrangement besides the family care is similar or extended-family like care provided by childminders, who often take care of their own children at the same time. Overall, the best solution for the smallest children is to be at home with parents or with a loving caretaker. In the case where parents cannot afford to stay at home, we need to think of alternative to daycares to meet the youngest children's needs.

Keywords: Daycare, Mother's participation, Labour market, UK

**Learning and Skills Council (2007). 'Train to gain: a plan for growth; November 2007- July 2011'. London, UK: Learning and Skills Council. Available at:**  
<http://www.dius.gov.uk/publications/Train-to-Gain-Executive-Summary.pdf>

Train to Gain is a national Service to support employers – of all sizes and in all sectors – to improve the skills of their employees as a route to raising the performance of their businesses. It gives employers, specialist, high quality advice, and help to identify training needs; and then connects them to the publicly or privately funded training that they want. Train to Gain is a commitment to jointly invest in training, by employers and government. In return for that commitment, employers can expect the following service:

- Quality assured advice in identifying skills needs at all levels
- Help to identify and source the high quality training and qualification solutions to meet those skills needs
- An expert who will pull together a skills solution package
- For those making the Skills Pledge, follow up advice and support that is fully integrated within the Train to Gain Service
- Access to advice on wider business needs, which will be enhanced from April 2009 with the transfer of skills brokerage to Business Link.

Their employees can expect:

- Access to training and qualifications to support their own skills development in line with those required by their employer
- Individual advice and guidance
- Individual diagnostic of their current skills levels
- Support in the workplace through intermediaries such as Union Learning Representatives



Train to Gain was introduced nationally in August 2006. In its first year 52,730 employers were engaged against a target of 47,770. Through public funds, almost a quarter of a million employees have been trained against a target of 313,590. Of these learners 100,000 achievements so far – ahead of profile. Employer satisfaction rates with skills brokerage have been consistently over 80 percent. Employee satisfaction with the training they have received is 77 percent. Evaluation shows strong commitment by learners to further investment in training. Additionally, 95 percent of eligible skills brokers achieved the new professional standard.

Keywords: Train to gain, Improvement of skills, Employers, UK

**Lister, R. (2005). 'Investing in the citizen-workers of the future: transformations in citizenship and the state under New Labour'. In Hendrick, H., (ed.) *Child welfare and social policy*, 449-463. Bristol, UK: The Policy Press.**

The author focuses on the New Labour's approach towards social policies and their new outlook and increased emphasis from the state on responsible citizenship. According to the author, the new approach includes the view that citizens are supposed to improve their employability, support themselves through paid work, invest their pensions and ensure proper behaviour of their children. New welfare architecture state's governance is described as 'the enabling, managerial, [and] partnership state'. The role played by the state is characterised as 'social investment state' and includes features such as investment in human and social capital, including children and community. Children are seen in the prism or future-citizens, rather than present ones. The state opts for redistribution of opportunities rather than incomes to promote social inclusion, integration of social and economic policy as well as adaptation of individuals and society to the competitiveness. For the children this approach brings the focus on their future and often overlooks the present needs. In one way the state is shifting toward means-tested benefits and therefore more liberal welfare, and on the other hand the importance of childcare is being taken into consideration and seen as both government and parents responsibility. However, the author reminds us that state is not acting always according to labels such as 'unity and integration' and that there is much more complexity in the governance shifts. There are often ambiguities about the social policies and there is much more improvement necessary for the genuinely child-focused approach and more egalitarian approach. Often there are inconsistencies in emerging social investment state.

Keywords: New Labour, Social approach, Responsible citizenship, UK



**Lydon, R., Walker, I. (2004). 'Welfare-to-work, wages and wage growth'. London, UK: Inland Revenue. Available at: <http://www.hmrc.gov.uk/research/ifs-wagegrowth.pdf>**

This paper attempts to uncover the effects of a welfare-to-work programme that acts as a wage subsidy on wage growth by exploiting an expansion to this welfare programme in the UK. A criticism often levelled at in-work support programmes is those that respond to the incentives to join the labour market may end up in 'dead end jobs' that have few prospects for progression up the wage/occupation distribution. The argument behind this proposition is never spelled out explicitly but seems to rely on a lack of incentives, for both worker and firm, to make investments in factors that promote wage progression – such as on-the-job search and training in general skills. Results of this study suggest that in-work welfare programmes can be designed to offer wider incentives beyond simply promoting the incentive to work. In particular, if such programmes can be designed to promote wage growth then there will be further, long run, effects on work incentives. Indeed, we would expect a policy that promoted wage growth would be good for long run work incentives even if there were no direct effect of the reform on work incentives. This is because work is the utilisation rate of human capital – so policies that promote human capital formation will, in an intertemporal model, also promote future work incentives.

Keywords: Welfare-to-work, Work incentives, UK

**Machin, S., Gregg, P. (2003). 'A lesson for education: University expansion and falling income mobility'. *New Economy*, 10 (4), 194.**

This paper examines the role of education policy in reductions in social mobility in Britain. Analysis is based on the National Child Development Survey (NCDS) of children born in one week in 1958, (surveys carried out at ages 7, 11, 16, 23, 33 and 42) and the British Cohort Survey of children born in one week in 1970 surveys carried out at ages 5, 10, 15, 26 and 30).

Intergenerational mobility was found to have fallen and intergenerational inequality risen across the cohorts. Educational attainment was found to account for 30 percent of the intergenerational persistence of income for sons and 40-50 percent for daughters. Analysis showed a high rise in higher educational inequality between 1958 and 1970 cohorts. The researchers conclude that the expansion of education (and in particular the expansion of the higher education system in the late 1980s and early 1990s) has been one factor in reinforcing the link between earnings and income of children and their parents.

Keywords: Education policy, Social mobility, Intergenerational mobility, UK



**McAleavy, G., Collins, K., Adamson, G., O'Hagan, C., Donegan, H.A., O'Reilly, B. (2004). 'Addressing policy implications of transgenerational poverty'. Belfast, NI: The Further and Higher Education Research Unit, University of Ulster. Available at: [http://www.equality.nisra.gov.uk/transgenerational\\_percent20poverty.pdf](http://www.equality.nisra.gov.uk/transgenerational_percent20poverty.pdf)**

The research papers present a study to analyse the experience of disadvantage among the Society of St. Vincent de Paul's clients in Ireland. The study aims to provide an insight into how prevent the passing of disadvantage between generations. The data suggests that clients of SVP require support and financial help; often clients are isolated and marginalised through the SVP services the clients can connect to the society and enable them to manage their problems. Significant group has used the services for a very long period of time and this seems more prevalent than the 'transgenerationality' of access to SVP services. The analysis points to the fact that unemployment or incapacitations were likely to provoke transgenerational poverty. The lack of adequate transportation, inadequate housing potentially in dangerous neighbourhood, health problems and the lack of education are all seen as causes and further transmission of poverty. The report underlines the need to remedy the above mentioned inadequacies by providing better public communication services especially for rural areas; provision of more essential health services and locating some of them in schools; to attend the families were children are missing from schools and attend to the costs of education. The authors also suggest the setting of community and health education centres and taking more into consideration the opinions and wishes of social services recipients.

Keywords: Transgenerational transmission of poverty, Ireland, Anti-poverty policies

**Melhuish, E., Belsky, J., Leyland, A. and others (2005). 'National Evaluation Report: Early impacts of Sure Start local programmes on children and families'. University of London, UK: The National Evaluation of Sure Start Team. Available at: <http://www.ness.bbk.ac.uk/documents/activities/impact/1183.pdf>**

A principal goal of Sure Start Local Programmes (SSLPs) is to enhance the functioning of children and families by improving services provided in the local programme areas. SSLPs were strategically situated in areas identified as having high levels of deprivation. SSLPs represent an intervention unlike almost any other undertaken to enhance the life prospects of young children in disadvantaged families and communities. What makes it so different is that it is *area based*, with *all* children under four and their families living in a prescribed area serving as the *targets* of intervention. This has the advantage that services within a SSLP area are universally available and thus limiting any stigma that may accrue from individuals being targeted. Home visits to obtain evaluation data were carried out in 16502 families in the first 150 SSLP areas and 2610 families in 50 comparisons, Sure Start-to-be communities. Data from the home visits were used to examine the effect of SSLPs on a wide range of child, parenting, and family outcome measures. Information obtained from interview



respondents (i.e. mothers) provided only limited evidence that services and communities were affected by SSLPs. SSLPs appeared to beneficially affect family functioning to a modest extent, with mothers of 9-month olds experiencing less household chaos and mothers of 36-month olds being more accepting of their children's behaviour. In sum, SSLPs appeared to enhance growth promoting family processes somewhat, though many more family outcomes appeared to be unaffected by SSLPs. Both beneficial and adverse effects of SSLPs on children were detected, though these were restricted almost entirely to 36-month olds and varied across subpopulations. When attention turned to comparisons among the 150 SSLP communities, however, there was some evidence that programmes led by health agencies had some advantages. The differential beneficial and adverse effects that emerged indicate that among the disadvantaged families living in the deprived SSLP areas, parents/families with greater human capital were better able to take advantage of SSLP services and resources than those with less human capital (i.e. teen parents, lone parents, workless households). The finding that an intervention has produced greater benefits for the moderately disadvantaged than for the more severely disadvantaged has occurred in other evaluations of interventions (e.g. Early Head Start, Love *et al.*, 2002). Possibly the utilisation of services by those with greater human capital left others with less access to services than would have been the case had they not lived in SSLP areas.

Keywords: Sure Start Local Programmes, High levels of deprivation, Children, UK

**Middleton, S., Perren, K., Maguire, S., Rennison, J., Battistin, E., Emmerson, C., Fitzsimons, E. (2005). 'Evaluation of education maintenance allowance pilots: Young people aged 16-19 years, final report of the quantitative evaluation'. Loughborough University, UK: Centre for Research in Social Policy for Department for Education and Skills. Available at:**  
<http://www.crsp.ac.uk/downloads/publications/ema/rr678.pdf>

This research reports findings from the longitudinal evaluation of the Education Maintenance Allowance (EMA) pilots, which followed two cohorts of young people who completed Year 11 in the summers of 1999 and 2000. In the pilot areas EMA was a weekly allowance of up to £30 or £40, available to 16-19 year olds from lower income families who remained in non-compulsory education. Termly retention and course achievement bonuses were also available. Results indicated that EMA increased participation and retention in post-16 education and reduced the proportion who became NEET. It appears to have had the strongest impact on the destinations of specific target groups who tended to be underrepresented in post-16 education (young men, young people from lower income families, and those who were not high achievers at year 11.) In some cases this impact appeared to extend beyond the period of EMA eligibility.

Keywords: Education Maintenance Allowance, Young people, UK





**Miliband, D. (2003). 'Opportunity for all: Targeting disadvantage through personalised learning'. *New Economy*, 10 (4), 224.**

The author considers the importance of schooling (focussing on personalised learning) to promoting social mobility, and argues that 'schooling has unique power to contribute to equality of opportunity'. The author considers key policy areas for promoting social mobility in schools. Targeting funding at highest need: Funding from (what was) the DfES is strongly skewed in favour of poorer children, however partly because poor children are distributed across a range of schools, the redistributive effect is diluted. The author notes the importance of the gifted and talented programme and the playing for success scheme in improving achievements aspirations and attitudes. The author notes that common sense says that the commitment, behaviour and aspirations of fellow pupils are important to educational performance and standards of achievement at GCSE have roughly doubled since the introduction of comprehensive schooling. However, he also notes that variation in performance within schools (at age 15) is greater than between schools- meaning poor children still fall behind in higher performing schools. The author suggests the importance of the national literacy and numeracy programmes, and the Excellence in cities programme. He notes that the fastest improvements in achievement at Level 4 in primary education have been in the schools with the highest proportion of pupils living in poverty. There is a need to ensure that each student's needs are assessed, talents developed, interests spurred and their potential fulfilled. Target help at those who most need it, to help overcome disadvantage at home. This requires assessment for learning – to diagnose appropriate learning opportunities; the author believes this will help disadvantaged students most, for whose attainment is depressed by low expectations and aspirations. A flexible curriculum is needed to be responsive to the needs of the learner. Sound school organisation is needed to aid primary secondary transition, and ensure appropriate support in schools. The author concludes with an overview of the foundations of the Labour Government's social democratic education settlement. There is a need for a clear pathway for every pupil through the education system. Additionally a commitment to informed teacher professionalism as the foundation for school improvement is necessary along with every school having the legal and financial flexibility to adapt provision to local needs. Central government must be committed to the resource, the priority and the moral purpose to give real leadership to the system.

Keywords: Schooling, Social mobility, Children, UK

**National Foundation for Educational Research (2007). 'Excellence in cities: national evaluation of excellence in cities 2002-2006'. DCSF Research Report. Available at: <http://www.dcsf.gov.uk/research/data/uploadfiles/DCSF-RR017.pdf>**

The Excellence in Cities (EiC) Programme including Excellence Clusters, provided additional resources and guidance for schools in the most disadvantaged communities between September 1999 and March 2006. Since April 2006 EiC funding has been mainstreamed and



now forms part of the School Development Grant. This means schools have the freedom to decide on the best use of their EiC resource and strategies for supporting school improvement and tackling barriers to pupil achievement resulting from disadvantage. Pupils in EiC schools, on average, made more progress than similar pupils in non EiC schools. This hold across all five GCSE outcomes - Best 8 Score; English Score; Maths Score; 5+ A\* to C GCSE Grades; 5+ A\* to C Grades with English and Maths and for the majority of years. For Best 8 and the two 5+ models the average progress made by EIC pupils in 2006 is significantly greater than the average progress made by similar pupils in 2002. FSM pupils were found to benefit from the policy, but not by more than their non-FSM peers. As school deprivation increases the difference in average progress between a pupil in an EiC school and a pupil in a non-EiC school, increases. The impact of school level deprivation, as measured by IDACI, would appear to be lessened for pupils in EiC schools, particular in the later years of 2005 and 2006.

Keywords: Excellence in Cities, Disadvantaged communities, Schools, UK

**Nicholls, J., Simm, C. (2003). 'The childcare tax credit element of Working Families' Tax Credit: a qualitative study'. London, UK: Inland Revenue Research Report. Available at: <http://www.hmrc.gov.uk/research/report7-cctcqualitative.pdf>**

This report presents the findings of a qualitative evaluation of the childcare tax credit component of Working Families' Tax Credit (WFTC), and is based on 46 depth interviews conducted with WFTC recipients in September and October 2002. □ Most parents prioritised finding working hours that suited them and then found childcare to match. Key drivers of working hours were personal preferences to work full or part time. Part time working was generally preferred among those with younger children. Childcare choices were driven by internal factors relating to awareness of available childcare and perceptions of quality, and external factors relating to what childcare was available, the flexibility of employers, transport issues, and cost. The main challenges that had to be faced ranged from dealing with predictable and regular occurrences such as school holidays to dealing with unpredictable and very short-term needs such as a child being ill. Most respondents perceived WFTC to be a general supplement to their income. Word of mouth from other parents, television adverts, and leaflets or one-to-one advice through Personal Advisors in Jobcentres were the most common sources of initial information. Understanding of the 'headline' eligibility criteria such as minimum working hours, the types of childcare that were eligible, and the earnings taper was strong. However, parents knew less about the 30hour premium and there were some misconceptions around when childcare could be claimed for. Encouraging factors when deciding whether to apply for the childcare tax credit element included the range of childcare eligible for support, and, for WFTC as a whole, the amount of support available, and the low minimum working hours threshold. Discouraging factors in applying for childcare tax credit related to the need to pay for at least 30 percent of childcare costs, and preferences to use informal (and therefore ineligible) forms of childcare. Having to pay for upfront childcare costs





could be problematic but was not insurmountable. The fact that WFTC awards were fixed for six months created difficulties for some recipients. Payment of tax credits via the employer had caused few concerns, although parents generally preferred to receive payment by Order Book or Automated Credit Transfer. There appeared to be little impact on working hours for the majority of parents in our sample. Support had widened the scope of affordable childcare for many parents. The availability of support for childcare had encouraged some parents to move into work. WFTC and the childcare tax credit component of this had developed into a key aspect of the household budget for recipients. It helped lone parents in particular to sustain their independence from ex-partners, family and the state and helped some women to build up their career. This had improved their standing in the labour market in terms of salary and seniority.

Non-recipients of childcare tax credit only had a patchy understanding of the specific childcare tax credit rules. The main reason for not applying for the childcare tax credit element was not using childcare, due to the ages of the children or working times which fitted into school hours. External drivers such as the breakdown of existing eligible childcare arrangements played the biggest role in why the ex-recipients in our sample did not re-apply for the childcare tax credit element.

Keywords: Working Families' Tax Credits, Childcare, UK

**Nunn, A., Johnson, S., Monro, S., Bickerstaffe, T., Kelsey, S. (2007). 'Factors influencing social mobility'. DWP Research Report 450. London, UK: Department for Work and Pensions, Corporate Document Services. Available at:**  
<http://www.dwp.gov.uk/asd/asd5/rports2007-2008/rrep450.pdf>

This paper comprises an extensive literature review of previous research on factors influencing social mobility. It includes policy related findings. The factors driving social mobility include social and cultural capital, inherited wealth and financial resources, early years development, educational attainment, labour market participation and progression, health and ability to participate in the labour market and geographical location. Despite the attempts of successive governments, social mobility appears to be remarkably resistant to policy initiatives designed to affect it.

The main points of the review are as following:

- Social mobility is one aspect of broader notions of fairness and social justice, alongside other important indicators such as inequality, political and democratic rights and poverty.
- Relative social mobility appears to be positively associated with other aspects of social justice such as lower levels of socio-economic inequality, although there is debate on this issue.



- The drivers of social mobility are multiple and complex. Attempting to isolate one over the others in a causal hierarchy may be unrewarding because they work together in combinations and work differently for different people.
- The factors driving social mobility include social and cultural capital (especially as available to family units), inherited wealth and financial resources, early years development (including aspirations and expectations), educational attainment, labour market participation and progression, health and ability to participate in the labour market and geographical location.
- Trends in social mobility over the last quarter century have also been driven by industrial and social change, resulting in localised concentrations of deprivation and social and occupational polarisation.
- Despite the attempts of successive governments, social mobility appears to be remarkably resistant to policy initiatives designed to affect it. Where Government policy does impact on social mobility this is often in complex and sometimes unpredictable ways, such as in relation to housing and education.
- The Department for Work and Pensions (DWP) can have an important role to play in tackling both intra-generational and inter-generational barriers to social mobility through supporting people to progress within the labour market.
- The complexity of factors influencing social mobility suggests that a 'joined-up' approach across Government departments, agencies, regional and local government and non-Government organisations is required in order to tackle this issue, with a particular emphasis on the links between Welfare to Work support and training provision.

Keywords: Social mobility, Policy initiatives, UK

**Piachaud, P., Suther, H. (2001). 'Reducing child poverty in Britain: An assessment of government policy 1997-2001'. *The Economic Journal*, 111, 85–101.**

The paper considers changes to taxes and benefits for children between 1997 and 2000, finding the main changes to be the Working Families Tax Credits (WFTC), changes to Child Benefit, Children's Tax Credit, and changes to Income Support (amongst other more general changes such as changes to income tax and the introduction of the minimum wage). The authors describe measures to achieve reductions in child poverty by changing taxes and benefits and promoting paid work. Their effects are assessed using a micro-simulation model. The policy changes will achieve a significant reduction in child poverty but it will remain in 2001 substantially higher than in 1979 and much higher than in most European nations. The results of the micro-simulation of the policy changes announced up to April 2000 suggest that the number of children in poverty will fall by about 1.23 million - a reduction of about one-third. Those raised out of poverty tend to be pushed just above the



line. This is most notably the case for the changes announced in the 2000 Budget. These added a few pounds at most to weekly income but managed to push a significant number of children over the line (Sutherland and Taylor, 2000). It is more difficult and more expensive to tackle more severe poverty as well as ensuring that families have incomes significantly higher than poverty levels

Most important have been redistributive measures favouring poor families, particularly working families. The promotion of paid work, assisted by declining unemployment, has contributed. Measures to tackle long-term causes such as educational failure and teenage births will over time make a contribution.

Keywords: Taxes, Benefits, Children, Poverty, UK

**Platt, L. (2005). 'Fair but unequal? Children, ethnicity and the welfare state'. In Hendrick, H. (ed.) *Child welfare and social policy*, 355-367. Bristol, UK: The Policy Press.**

The chapter examines how the severity of poverty varies within the population supported by means-tested benefits. The findings are analysed on the basis of administrative records from Birmingham, combined with budget-standards needs for children. Furthermore, the author calculates the shortfalls examine how they differ among five ethnic groups: Black Caribbean, Indians, Pakistanis, Bangladeshis and White UK. The chapter concentrates on families receiving either Income Support (IS) or Income based Jobseeker's Allowance. From the study the author comes with following findings. Bangladeshi and Pakistani children are more likely to grow up in families supported by IS. Even though the number of White UK children is lower than within other groups, the families on IS support tend to remain on the support more likely than other groups. The Indian children families show lower prevalence of poverty, followed by Pakistani and at the end Bangladeshi children families. The persistent poverty within the White UK group is not accompanied by significant shortfalls in incomes as it is observed within Asian minority groups. It could be associated with the smaller size of White UK families as well as Black Caribbean families. The study shows the necessity to examine the rationality behind benefits and the necessity to analyse ethnic variations.

Keywords: Poverty, Means-tested benefits, Ethnic groups, UK



**Plewis, I., Hawkes, D. (2005). 'Feasibility study into the effects of low income, material deprivation and parental employment on outcomes for children both in adulthood and as children'. DWP Working Paper 20. London, UK: Department for Work and Pensions. Available at: <http://www.dwp.gov.uk/asd/asd5/WP20.pdf>**

The purpose of this project was to determine the feasibility of a more substantive project to examine the links between income-related variables and outcomes. To do so, we have reviewed the relevant literature, examined the studies with the potential to answer the questions posed and related those studies to an ideal study that would maximise the chances of obtaining reliable and unbiased estimates of the required relationships. Whilst focused on the authors concern of considering the feasibility of a future study. The research does include some useful evaluation of previous literature, including evaluations of policy interventions. The longitudinal evaluation of the Education Maintenance Allowance pilot to above (Ashworth *et al.*, 2002) – estimates that the up to £30-40 weekly allowance increased the post-16 education participation of 16 to 19-year-olds from lower-income families by 5.9 percentage points. The study by Clark-Kaufmann *et al.*, 2003 is in fact a review of several random assignment to welfare studies in the US. They find that increasing maternal employment with additional income support of \$1,500-\$2,000 per year for two to three years increases educational attainment for those 0-5 years old by eight percent of a standard deviation compared to those who also experienced an increase in maternal employment without the additional subsidy. There was an insignificant negative effect for those aged 6-15. In the study by Goering and Ferns, 2003 analyses data from the Moving to Opportunity programme in the US. The key findings are that moving from a poor to a wealthier neighbourhood is associated with a marked reduction in behavioural problems and improvements in school test scores. In addition, for older children, it is also associated with a reduction in the number of arrests for violent crime.

Keywords: Income-related variables, Policy interventions, Low-income families, US, UK

**Potter, C.A. (2007) 'Developments in UK early years policy and practice: can they improve outcomes for disadvantaged children?' *International Journal of Early Years Education*, 15 (2), 171–180. Available at: <http://dx.doi.org/10.1080/09669760701289052>**

This paper discusses the extent to which two new major UK policy initiatives may impact on this situation, namely the introduction of the *Early Years Foundation Stage*, a new curricular framework for children aged from birth to five, and the development of the *Early Years Professional role*, seen as key to the implementation of this framework. Children from poorer socio-economic backgrounds are at much greater risk of language delay, which is a key predictor of poorer educational outcomes, indicating a fundamental need to enhance the language abilities of these children in their early years in order to improve educational progress. The authors find that to improve educational outcomes for disadvantaged children,



there must be informed and sustained attempts to improve their language and communication development in the early years. The realisation of such a major goal will require the widespread creation of language-rich preschool environments, characterised by frequent high-quality opportunities for communication. To create such a situation, early years staff must possess sufficient detailed knowledge and understanding not only of how language and communication develops but also of the strategies most likely to promote it. It appears that, although draft guidelines for the new EYFS contain much that early years practitioners may be able to support, there remains a significant lack of specific and in-depth guidance in language development and how it can be promoted. This is in contrast to imperatives in other European countries where a developmental focus pervades curricular endeavour with young children (Locke *et al.*, 2002). To achieve a significant change in language and communication opportunities in early years environments, the central importance of language, acknowledged in the draft EYFS guidance, must pervade the whole document and be underpinned by an informed developmental framework. Unfortunately, the introduction of the new EYP likewise does not seem set to exert a major impact on the development of language-rich environments in the early years due to the general and largely superficial nature of the knowledge required to meet the relevant standard in this key area.

Keywords: Children, Poverty, Language delay, UK

**Pound, E. (2007). 'Evaluation of the Adult Learning Grant Cohort 2, Wave 2'. London, UK: Department for Education and Skills and Learning and Skills Council. Available at**

[http://readingroom.lsc.gov.uk/Lsc/National/alg-cohort1\\_waves-1-2.pdf](http://readingroom.lsc.gov.uk/Lsc/National/alg-cohort1_waves-1-2.pdf)

The author evaluates The Adult Learning Grant (ALG) which aims to support adults who have not yet obtained their first Level 2 or first Level 3 qualification. The ALG is intended to help adults with the additional costs of learning (for example, books, travel) through the provision of a means-tested monetary grant. The grant (up to £30 per week paid during term time) is available to learners earning up to £19,000 (or up to £30,000 of joint income if the learner cohabits with a partner in paid employment). Evidence suggests that ALG continues to be attractive to young learners with few financial responsibilities (i.e. living with parents). It continues to be more attractive to learners studying at Level 3, although it is relatively effective at attracting learners studying at Level 2. The grant continues to be used as intended, that is, to help learners to pay for books, and course-related travel. Evidence suggests that ALG is having a positive effect on learner retention and their decisions to study full-time. A sizeable proportion of recipients said they would have dropped out of their course if they had not received ALG, and that ALG had influenced their decision to study full-time. There is also evidence to suggest that ALG is particularly effective in supporting achievement at Level 3, and is associated with favourable employment outcomes: with recipients entering



full-time work at a higher rate than non-applicants and moving out of elementary occupations (a pattern not observed among non-applicants).

Keywords, The Adult Learning Grant, Learner retention, UK

**PriceWaterhouseCoopers (2007). *Academies Evaluation. 4<sup>th</sup> Annual Report*,  
PriceWaterhouseCoopers for Department for Children Schools and Families.**

**Available at:**

<http://www.standards.dfes.gov.uk/academies/pdf/FourthAnnualPwCReportfinal.pdf>

Academies are publicly funded independent schools catering for pupils of all abilities. They are established by a wide range of Sponsors, including, educational foundations, universities, business, private school trusts and faith communities. Generally, they replace existing poorly performing schools, although some are wholly new schools in areas that have experienced low educational achievement. Others, such as City Technology Colleges (CTCs) are already successful schools, and these provide support in a variety of ways to lower-achieving schools, in order to improve school performance. All Academies have specialisms, including for example, business, sport, the arts and the environment. By September 2007 there will be more than 80 Academies open in more than 50 Local Authorities in England with at least 100 additional Academies being developed. In the longer term, the Government has indicated its commitment to establishing 400 Academies, with at least 200 open or in the pipeline by 2010.

Pupil performance in Academies since 2002 generally compares favourably to other schools in similar circumstances. In particular, across key indicators relating to Key Stage 3 and Key Stage 4, the evidence shows that the rate of improvement in Academies is generally greater, and often significantly greater, than the corresponding improvements in other similar schools. This is consistent with the survey data which show high satisfaction rates amongst parents and pupils towards their Academies and the principals. Some of the improvement in pupil performance can be explained in terms of the fact that the social and educational profile of pupils entering Academies is improving, and at a rate that is faster than other similar schools. However, there is also clear evidence from the evaluation, in particular the detailed fieldwork conducted with inter alia Sponsors, principals, staff and pupils, that much of this improvement in performance can be attributed to individual Academies doing things differently, and well, on the ground. Particular features of Academies that seem to be making a positive difference include:

- Pastoral and organisational strategies to support pupils in the transition from primary to secondary schooling;
- A range of initiatives, for example, pupil leadership and pupil 'voice' schemes, which have worked effectively to raise pupil aspirations and engagement with their education;





- Pastoral support alongside robust strategies for tackling poor attendance and behaviour; and
- A number of critical success factors, or ‘enablers’, which are key features of the Academies initiative and which, in a sense, distinguish Academies from other schools. Such enablers include Academies’ independent status, governance and leadership, all of which are being used to various degrees by Academies to improve pupil performance.

Keywords: Academies, Education, Performance, UK

**Rutter, M. (2006). ‘Is Sure Start an Effective Preventive Intervention?’ *Child and Adolescent Mental Health*, 11 (3), 135–141.**

This article reviews and critiques the findings from the reports of the National Evaluation of Sure Start Team, published in November 2005. The programme Sure Start was established with the aim of eliminating child poverty and social exclusion. The family and child functioning after 3 years of Sure Start, as compared with Sure Start-to-be areas, showed very few significant differences, with some indication of adverse effects in the most disadvantaged families. These findings are discussed in relation to their service, research and policy implications—with the conclusion that the research evaluation was well conducted, but the findings are inconclusive. There are lessons on how to improve Sure Start and what should have been done differently. However worthwhile the Sure Start initiative, it seems implausible that child poverty could be dealt with satisfactorily without more radical changes in taxation and benefits. So far as social exclusion is concerned, there is the somewhat different dilemma provided by the tendency of universal interventions to increase, rather than decrease, social inequities. That definitely does not mean that universal interventions should be avoided, but it does mean that they need to be combined with appropriate targeted interventions. The Sure Start research is inconclusive. There are suggestions that it includes things of real value, but also the research gives indications that it is indeed failing to reduce social inequalities. The Government would be exceedingly foolish to ignore these warning signs. Government has already stated that they intend to incorporate Sure Start into existing provisions. That is problematic because it assumes that Sure Start has been shown to be effective and it has not.

Keywords: Sure Start, Child poverty, UK



**Skevik, A. (2005). 'Children of the welfare state: Individuals with entitlements or hidden in the family?' In Hendrick, H., (ed.) *Child welfare and social policy*, 339-354. Bristol, UK: The Policy Press.**

The chapter shows how the recognition of children has shaped social policy over time in UK and Norway. The analysis focuses on the period from 1945 to 1970. In most of the cases children are invisible in the social policy debate because family is seen as a unity and central building block of the society. The alternative view, in which children as individuals are taken into consideration, is to see family as separate individuals and concentrate on their relationships. In Norway the policies in the period '45 to '70 were guided towards parents and children recognizing important relationships within family, while the UK favoured policies towards families. The lack of attention paid to children in the UK has been highlighted by many scholars. In Norway the approach is towards the societal responsibility for children along with the developments of welfare state. The child benefits for children living with one parent or for orphans has been introduced in 1946 and it was payable for the first child for all lone parents. In the UK orphans were clearly privileged over children with one parent. The difference is also visible in the treatment of widows in the UK the widow received benefits for the child and when she remarries they ceases. However in Norway the child as well as the widow receives a pension and even if woman remarries the child keeps the pension. Only if the 'new' parent adopts the child a biological parent is considered to be replaced.

Keywords: Recognition of children, Norway, UK

**Smith, N., Middleton, S. (2007). 'A review of poverty dynamics research in the UK'. York, UK: Joseph Rowntree Foundation. Available at:**  
<http://www.jrf.org.uk/bookshop/eBooks/2040-poverty-dynamics-review.pdf>

This study aimed to gather and reflect on existing poverty dynamics literature in order to examine the different forms of poverty, how different social groups experience it, and how people enter and leave poverty. To understand the implications for policy aimed at tackling poverty and disadvantage and highlight priorities for further research. The researchers conclude that the concept of 'the poor' given by point-in-time studies is misleading: poverty dynamics finds a broad population with diverse experiences of poverty, reveals who moves in and out of poverty and why, and sheds light on how life chances are stacked against certain individuals and families. There appears to be no clear understanding of poverty dynamics in current UK social policy. Progress to eradicate poverty has been held back by a failure to target persistent poverty and to safeguard against re-entry to poverty.

Keywords: Poverty dynamics, Social policy, UK





**Solera, C. (2001). 'Income transfers and support for mother's employment: the link to family poverty risks'. In Vleminckx, K., Smeeding, T.M. (2001). *Child Well-being, child poverty and child policy in modern nations*. Bristol, UK: The Policy Press**

The author analyses the way in which Sweden, UK and Italy responded to the risk of poverty and which dimensions and types of social policies were the most effective ones. Instead of focusing on income transfers the author decided to pay closer attention to policies affecting mothers' employment because family's well being is strongly connected with the position of mothers in the labour market. Therefore the focus was on income transfers and policy measures supporting maternal employment. Overall the author underlines the importance of cash benefits, however they are insufficient to guarantee welfare. In Sweden the state intervenes with generous and universal income transfers. Also women are well integrated into the labour force regardless of being married or having children. The support includes extensive economic support for families with children and a comprehensive system of public childcare and good parental leave programme. In the UK the transfers of benefits are selective and on the low level to encourage the unemployed into the labour force, however because of the lack of maternal employment support the British system can create poverty traps. Poverty among one-parent families in the UK is very high. The parents rely on social assistance and are forced to use it as an alternative to full-time employment. In Italy the selective system of benefits based on employment status is ineffective and reproduce market inequalities. On the other hand in Italy lone parents are more likely to work than in the UK. Overall policies aimed at facilitating participation of mothers in the labour market should be seen as crucial of effective anti-poverty package.

Keywords: Poverty Mothers' employment, Italy, Sweden, UK

**Statham, J. (2004). 'Effective services to support children in special circumstances'. *Child Care, Health and Development*, 30 (6), 589-598.**

This review considers the evidence for effective services to support children living in five kinds of special circumstances: (1) those at risk of offending; (2) teenage parents; (3) children whose parents have drug, alcohol or mental health problems; (4) children living with domestic violence; and (5) children who have been abused or neglected. In practice, there is often considerable overlap between these groups, and many children face multiple disadvantage. Reviews of mostly US studies using comparison groups have found some support for the positive impact of parenting skills programmes. There was mixed or insufficient support for mentoring programmes, motor projects and victim-offender mediation schemes, and no support for 'boot camps' using military training and 'shock' incarceration programmes (Lipsey 1995; Utting *et al.* 2002). There have been a number of systematic reviews of evidence on approaches to preventing teenage pregnancy, mostly based on studies undertaken in the USA. A factor strongly associated with deferring pregnancy is a good general education. The most reliable evidence shows that sex education does not



increase sexual activity or pregnancy rates. 'Joined-up' services and interventions aimed at preventing pregnancy, and working in partnership with local communities are more likely to meet the needs of young people and have a positive impact on reducing unwanted pregnancies than single-agency approaches. There is less evidence on what services are helpful once young people have become parents. The health and development of teenage mothers and their children has been shown to benefit from programmes promoting access to antenatal care; targeted support by health visitors, social workers or 'lay mothers'; and provision of social support, educational opportunities and pre-school education (NHS Centre for Reviews and Dissemination, University of York 1997). Targeted parenting programmes may also have positive outcomes. A key message from the research in this field is the importance of creating effective links between services for children and services for parents who have alcohol, drug or mental health problems. A review of impact and intervention studies in cases of parental drug misuse describes three examples of good practice in liaison between agencies to provide services that address the needs of children as well as parents, although again there is little hard evidence for effectiveness (Tunnard 2002a). Key factors in common in these pilot projects were:

- an intensive approach with an emphasis on outreach work with families;
- specialist drugs workers charged with fostering positive links across agencies;
- a holistic view of needs rather than a focus on crisis events.

Children and young people may be caring for parents with disabilities or chronic ill health, as well as those with drug, alcohol or mental health problems. The studies found that young carers want their contribution recognised and choice about whether to continue or to stop caring. There is little information on the effectiveness of interventions to support children who are living with domestic violence. A survey of work with children in women's refuges in the UK (Hague *et al.* 1996) describes and categorizes various approaches, such as play work; working with and through mothers; direct work with children and advocacy work for children. There are very few studies of the effectiveness of interventions where abuse and neglect have already occurred. An assessment of the available evidence finds most support for cognitive-behavioural approaches, typically combining parent training with self management techniques (such as anger control) and problem solving. Short task-focused interventions are likely to need backing up with longer term, broad-based support including help with relationship problems, depression, low self-esteem, substance misuse and financial issues (Macdonald 2002). One of the best evaluated multisystemic approaches is Project 12-Ways, which has been shown to reduce reported abuse and neglect among families using it in the USA compared to a control group (Lutzker & Rice 1987). Few evaluations have been carried out of the effectiveness of treatments for sexually abused children, especially in the UK. A preliminary evaluation of Connections, an interagency project in Dorset providing fast-track, flexible assessment and therapeutic services (such as counselling, adventure activities and complementary therapies) for young people in care who have been sexually abused, showed



promising results in terms of engaging young people who had been unwilling to use conventional child and adolescent mental health (CAMH) services (Mistral & Evans 2002).

Keywords: Disadvantaged children, Young people, Social services, US, UK

**Stuart, A., Brewer, M., Wakefield, M. (2005). 'Tax and benefit changes: who wins and who loses?' London, UK: Institute for Fiscal Studies election briefing. Available at: <http://www.ifs.org.uk/bns/05ebn1.pdf>**

This briefing describes the effects of the tax and benefit changes implemented by Labour since 1997 with a net cost to the exchequer of around £2.2 billion in 2005–06. The average (mean) impact of this small net giveaway is to raise household disposable incomes by £1.69 a week or 0.4 percent. The biggest proportionate gains are in the 2nd poorest tenth of the population, whose disposable incomes are increased by 11.4 percent, while the richest tenth fare worst, with a cut in income of 3.7 percent. Tax and benefit reforms since 1997 have clearly been progressive, benefiting the less well-off relative to the better-off. Reforms in the second term – while less generous on average – were more progressive than those in the first, with the poorest faring better. Increases in council tax above inflation since 1997 will raise £5.8 billion in 2005–06, net of council tax benefit. This outweighs the giveaway by central government, and leaves households overall £2.85 a week worse off on average, equivalent to 0.6 percent of their disposable incomes. The increase in council tax is regressive, except for the poorest fifth of the population, who are partially protected from the rises by council tax benefit.

Keywords: Tax, Benefits, Gains, UK

**Waldfoegel, J. (2007). 'Welfare Reforms and Child Well-Being in the US and UK'. London, UK: Centre for Analysis of Social Exclusion (CASE). Available at: <http://sticerd.lse.ac.uk/dps/case/cp/CASEpaper126.pdf>**

This paper examines the effects of recent welfare reforms in the US and UK on the well-being of children in low-income families, looking specifically at the effects on poverty, family expenditures, and child health and development. The paper finds some commonalities but also some notable differences. Common to both countries is a sizable reduction in child poverty, although the reduction in child poverty in the US has been less, and some families appear to have been left behind. The work-focused US reforms provide little or no support to those who do not work, and this is reflected in the concerning trends at the very bottom of the distribution. In the UK, in contrast, benefits for those who do not work have been raised, providing a more generous floor for those at the bottom. For the UK, the good news is that low income families affected by the reforms are spending more money on items related to children and are more likely to own a car and a phone, items that are essential if families are to be connected to friends, family, and work. For the US, the story is somewhat different, with



families affected by welfare reforms primarily spending more money on items related to employment but not items for children. The US results make sense given that parents had to go to work or increase their employment if they were to increase their incomes post welfare reforms, but are concerning if the intent of those reforms was to benefit children through increased expenditures on them. There is a logic to the results for these two countries – to a large extent, the results are what we would expect given the design of the reforms. The UK made an exceptional effort to improve the position of children in low-income families and this is reflected in its success in reducing child poverty and raising the expenditures of low-income families on child-focused and learning and enrichment items. The US made an exceptional effort to increase employment among single mothers, even at the risk of leaving some who could not work without a source of safety net income, and it has been remarkably successful at attaining that goal, with more single mothers working, incomes rising and poverty rates falling, but with families spending much of those income gains on work-related, rather than child-focused, investments, and with some families being left behind. We know less about actual outcomes for children, but given these patterns of results, it seems fair to conjecture that low-income children in the UK may have gained more in terms of health and development.

Keywords: Children, Welfare reforms, Low-income families, US, UK

**White, S. (2003). 'Autonomy for all? On the case for an inclusive assets policy'. *New Economy*, 10 (4), 219.**

This paper presents a theoretical overview of the importance of asset based wealth in tackling wealth inequalities. In particular, they note big rises in asset based poverty. Between 1979 and 1996 the proportion of households in the UK with no assets increased from five percent to ten percent for the whole population, and from ten percent to 20 percent for 20-34 year-olds (Kelly *et al.* 2003). They also recognise that traditional promotions of asset ownership (such as tax relief for pensions are not well calibrated to deal with contemporary asset poverty or to reverse recent trends in wealth distribution. They note a number of ways in which the promotion of assets can promote positive life outcomes and social mobility. The author considers a recent Government policy to increase asset based wealth across poorer families, (in particular the Child Trust Fund scheme). Their apparent support for the scheme is founded on the basis of the theory behind the promotion of asset based wealth for poorer families. They conclude that a successful program to increase social mobility could combine asset based wealth for poorer families (such as the child trust fund and the saving gateway) combined with (and even funded by) a reform of inheritance tax which lowers the 'floor' and raises the 'ceiling'. They suggest that this might help ensure that everyone starts adulthood with a reasonable inheritance of assets, but prevent people from enjoying an excessive inheritance of assets.

Keywords: Asset based wealth, Inequalities, Poor families, UK



**Wiggins, M. (2005). 'Sure Start Plus: national evaluation'. Social Science Research Unit. London, UK: Institute of Education, University of London. Available at: <http://www.dfes.gov.uk/research/data/uploadfiles/ssplusevaluationfinalreport.pdf>**

This paper evaluates the Sure Start Plus which is an on-going UK Government pilot initiative to support pregnant young women and young parents under 18 years of age. The core aims set out at the beginning of the programme were to improve the social and emotional wellbeing of pregnant young women, young parents and their children. Additionally, to strengthen the families and communities of pregnant young women and young parents. Finally the aims were to improve the learning and health of pregnant young women, young parents and their children. Despite diversity within service delivery between programmes, there are some general aspects of implementation that appear to lead to more successful programme operation. These include:

- Having a paid co-ordinator who has operational responsibility for the implementation of the programme was very beneficial.
- Providing services across one local authority only was much more successful than trying to co-ordinate services over a wider area.
- Having a dedicated partnership board providing both strategic and operational support in the development and implementation of the programme helped the smooth running of the programme.
- Employing advisers with a remit to deliver a package of one-to-one support that begins with help around crisis issues and is adaptable to the expressed needs of the young woman.
- Prioritising the young people with the most complex needs, so that caseloads are not overwhelmed.
- Surprisingly, not using the name 'Sure Start Plus' was operationally beneficial for many programmes. There was better understanding of the programme by young people and other service providers when a more generic title was used.

Projects were more successful at addressing the young person's expressed and immediate needs and averting crises. In that sense the priority of most programmes has been to target the most vulnerable young women because their needs were most pressing. The were also successful in targeting the most vulnerable young women, the work has contributed towards achieving a reduction in inequalities and combating social exclusion, which are themselves important aims of the Sure Start Plus programme, as well as government policy more generally.

Keywords: Sure Start Plus, Young women, UK



**The National Evaluation of Sure Start (NESS) (2008). 'The Impact of Sure Start Local Programmes on three year olds and their families'. Institute for the Study of Children, Families and Social Issues. London, UK: Birkbeck, University of London. Available at: <http://publications.teachernet.gov.uk/eOrderingDownload/NESS-2008-FR-027.pdf>**

This second phase of the Impact Study of the National Evaluation of Sure Start (NESS) focuses on over 9000 3-year-olds and their families in 150 SSLP areas who were initially studied when the children were 9 months of age. These children/families were compared at three years of age with 1,879 children/families who resided in similar areas that did not have SSLPs. Comparisons of children and families living in SSLP areas with those living in similar areas not receiving SSLPs revealed a variety of beneficial effects for children and families living in SSLP areas, when children were 3 years old.

- There were positive effects associated with SSLPs with respect to 7 of the 14 outcomes assessed.
- SSLP children showed better social development, exhibiting more positive social behaviour and greater independence/self-regulation than their non-SSLP counterparts.
- Parenting showed benefits associated with living in SSLP areas, with families in SSLP areas showing less negative parenting while providing their children with a better home learning environment. The beneficial parenting effects appeared to be responsible for the higher level of positive social behaviour in children in SSLP areas. Also families in SSLP areas reported using more services designed to support child and family development than did families not in SSLP areas.
- In addition, children growing up in SSLP areas were more likely to have received the recommended immunisations and were less likely to have had an accidental injury in the year preceding assessment.

The results of this second phase of impact evaluation differ markedly from those of the first phase (2005) carried out by the NESS Impact Study team. Whereas earlier findings indicated that the most disadvantaged 3-year-old children and their families (i.e., teen parents, lone parents, workless households) were doing less well in SSLP areas, while somewhat less disadvantaged children and families benefited (i.e., nonteen parents, dual parent families, working households), the current phase of the impact evaluation provides almost no evidence of adverse effects of SSLPs. The SSLP effects appeared generalisable across population sub-groups (e.g., workless households, teen mothers.) SSLP impact evaluation leads to the cautious conclusion that the increased benefits of SSLPs detected in the current study stem from (a) improvements in service effectiveness in SSLPs that have occurred in recent years, as well as (b) the longer exposure to SSLP services of the 3-year-olds and their families in the current phase of evaluation compared to the service exposure of those in the





earlier phase of impact evaluation. It is plausible that the differences in findings across the first and second phases of the NESS Impact Study reflect actual changes in the impact of SSLPs resulting from the increasing quality of service provision, greater attention to the hard to reach, the move to children's centres, as well as the greater exposure to the programme of children and families in the latest phase of the impact evaluation.

Keywords: Sure Start, Disadvantaged children, UK



## 2 United States

**Anderson, J.V. (2001). '5 a day fruit and vegetable intervention improves consumption in a low income population'. *Journal of the American Dietary Association*, 101, 195-202.**

The article describe the FRESH Project (Farm Resources Encouraging and Supporting Health), which is a Michigan farmers' market nutrition program of the WIC, that provides fruit and vegetable coupons as well as education to WIC participants in addition to the regular food package. Both components of the intervention, farmer's market coupons, as well as education about fruit and vegetable use, were significantly related to change in attitudes about fruit and vegetables, and changes in behaviour related to those foods. Education was found to affect consumption behaviour indirectly through its impact on attitude. Coupons affected consumption behaviour but did not affect attitudes directly or indirectly. Coupons showed a bigger impact on consumption behaviour than education. Maximum impact on the combined attitudinal and consumption behaviour was achieved through the combination of both components.

Keywords: Nutrition programme, Farmer's market, Michigan, US

**Bennett, N.G., Lu, H. H., Song, Y. (2002). 'Welfare reform and changes in the economic well-being of children'. NBER Working Paper 9399. Cambridge, MA: National Bureau of Economic Research. Available at: <http://www.nber.org/papers/w9399.pdf>**

This paper looks at the impact of the Temporary Assistance for Needy Families program in the US, on child well being. Since the implementation of the Temporary Assistance for Needy Families program in late-1996, welfare rolls have declined by more than half. This paper explores whether improvements in the economic well-being of children have accompanied this dramatic reduction in welfare participation. Further, we examine the degree to which the success or failure of welfare reform has been shared equally among families of varying educational background. The authors analyze data from the March Current Population Surveys over the years 1988 through 2001. Specifically, they link data for families with children who are interviewed in adjacent years and determine whether their economic circumstances either improved or deteriorated. In a bivariate framework TANF is associated with higher incomes; but this association becomes insignificant in the presence of business cycle controls. The major finding of this study is that the changes in the economic well-being of poor children that have occurred as we have transitioned into the TANF era are strongly differentiated by the educational attainment of their parents. All poor families have not experienced this reform effort in the same way. In particular, the family incomes of poor children with less-educated parents have suffered greatly in the TANF era, relative to the era prior to any welfare reform, while the family incomes of children from college-educated families have improved.



Keywords: Temporary Assistance for Needy Families, Children's wellbeing, US

**Blundell, R. (2005). 'Earned income tax credit policies: Impact and optimality, The Adam Smith Lecture, 2005'. *Labour Economics*, 13, 423–443.**

The growing popularity of earned income tax policies has stemmed from changes in the economic environment during the late 1980s and early 1990s. Specifically, the secular decline in the relative real wages of the low skilled, and the resilience of child poverty rates in both the US and the UK. To combat these two issues, welfare to work policies turned to in-work credits for lone parents. As a result the last decade has seen the increasing reliance in welfare policy on in-work benefits, and more specifically on earned income tax credits. The aim of such policies is to break the 'iron triangle' of welfare policy - that is the three, often conflicting, goals: raising the living standards of those on low incomes; encouraging work and economic self-sufficiency; and keeping government costs low.

Keywords: Tax policies, Welfare to work, US, UK

**Case, A., Paxson, C. (2006). 'Children's Health and Social Mobility'. *The future of children*, 16 (2). Available at:**

[http://www.futureofchildren.org/information2826/information\\_show.htm?doc\\_id=392783](http://www.futureofchildren.org/information2826/information_show.htm?doc_id=392783)

The authors show that childhood health problems can prevent poor children from achieving economic success as adults. Children from low-income families are more likely than other children to have serious health problems. Income-related disparities in childhood health are evident at birth or even before, and the disparities grow more pronounced as children grow older. Not only do poor children have more severe health problems than wealthier children, but they fare less well than wealthier children who have the same problems. They also receive less and lower-quality medical care for their problems. And poor families may be less well equipped to manage their children's health problems, which could worsen their effects. The available U.S. data sets do not allow researchers to track individuals' health and economic well-being from birth into adulthood, but three British data sets are producing growing evidence that health in childhood is a determinant of educational attainment, which in turn affects adults' employment opportunities and wages. Children in poor health are also more likely to have poor health as adults, and their health as adults adversely affects their economic status. Case and Paxson note that eliminating income-related disparities in health problems in childhood would do little to reduce earnings disparities between richer and poorer adults. However, they emphasize that, for children in poor health, improvement in physical condition in childhood would lead to substantial improvement in economic circumstances. The authors cite several areas, including expanded prenatal care, maternal smoking cessation programs, and nutrition programs, as deserving particular attention. They contend that increased access to health care is not sufficient to improve children's health.



The next wave of policies should focus on improving the quality of health care and strengthening the ability of parents to manage their children's health problems.

Keywords: Children's health, Social mobility, Poor families, US

**Centres for Medicare and Medicaid Services (CMS) (2005). 'Medicaid at a glance 2005'.**

**Baltimore, MD: CMS. Available at:**

<http://www.cms.hhs.gov/MedicaidGenInfo/Downloads/MedicaidAtAGlance2005.pdf>

The Medicaid Program provides medical benefits to groups of low-income people, some who may have no medical insurance or inadequate medical insurance. Although the Federal government establishes general guidelines for the program, the Medicaid program requirements are actually established by each State. Whether or not a person is eligible for Medicaid will depend on the State where he or she lives. States are required to include certain types of individuals or eligibility groups under their Medicaid plans and they may include others. States' eligibility groups will be considered one of the following: categorically needy, medically needy, or special groups.

Categorically Needy:

- Families who meet states' Aid to Families with Dependent Children (AFDC) eligibility requirements in effect on July 16, 1996.
- Pregnant women and children under age 6 whose family income is at or below 133 percent of the Federal poverty level.
- Children ages 6-19 with family income to 100 percent of the Federal poverty level.
- Caretakers
- Supplemental Security Income (SSI) recipients
- Individuals and couples who are living in medical institutions and who have monthly income up to 300 percent of the SSI income standard

Medically Needy: The medically needy have too much money (and in some cases resources like savings) to be eligible as categorically needy. If a state has a medically needy program, it must include pregnant women through a 60-day postpartum period, children under age 18, certain newborns for one year, and certain protected blind persons. States may also, at the State's option, provide Medicaid to:

- Children under age 21, 20, 19, or under age 19 who are full-time students.
- Caretaker relatives
- Aged persons (age 65 and older).



- Blind persons
- Disabled persons
- Persons who would be eligible if not enrolled in a health maintenance organisation.

In addition to a state's Medicaid program, states have a health insurance program for children up to age 19, known as the State Children's Health Insurance Program (SCHIP). In some states the SCHIP is part of the state's Medicaid program, in some states it is separate, and in some states it is a combination of both types of programs. These programs are for children whose parents have too much money to be eligible for Medicaid, but not enough to buy private insurance. Most states offer this insurance coverage to children in families whose income is at or below 200 percent of the Federal poverty level. Not all the insurance programs provide the same benefits, but they all include shots (immunisations) and care for healthy babies and children at no cost. Families may have to pay a premium or a small amount (co-payment) for other services depending on their income.

Keywords: Medicaid Program, Eligibility, Health insurance, US

**U.S. Department of Health and Human Services (2008). 'Child Care and Development Fund Fact Sheet'. November 2008. Available at:**

<http://www.acf.hhs.gov/programs/ccb/ccdf/factsheet.htm>

The Child Care and Development Fund (CCDF) has made available \$5 billion to States, Territories, and Tribes in fiscal year 2006. This program assists low-income families, families receiving temporary public assistance, and those transitioning from public assistance in obtaining child care so they can work or attend training/education. Subsidised child care services are available to eligible families through certificates (vouchers) or contracts with providers. Parents may select any legally operating child care provider. A minimum of four percent of CCDF funds must be used to improve the quality of child care and offer additional services to parents, such as resource and referral counselling regarding the selection of appropriate child care providers to meet their child's needs.

Keywords: Child Care and Development Fund, Low-income families, US

**Cook, J.T., Frank, D.A. (2008). 'Food security, poverty, and human development in the United States'. *Annals of the N.Y. Academy of Sciences*, 1136, 193–209.**

The authors examine the welfare reform legislation passed in 1996 (the Personal Responsibility and Work Opportunity Reconciliation Act) which made sweeping changes to the main cash assistance program in the United States (Temporary Assistance to Needy Families [TANF], previously known as Aid to Families with Dependent Children). These changes included several previously nonexistent requirements enforced by a range of



punitive sanctions, which often led to partial or total termination of a family's TANF benefits. Families with children younger than 3 years whose welfare benefits had been reduced or terminated by sanctions had 50 percent greater odds of being food insecure than those with stable benefits. Children in families that suffered welfare sanctions also had 30 percent greater odds of having been hospitalised since birth, and 90 percent greater odds of being admitted from an emergency department (ED) visit, than those of similar children in families whose benefits had not decreased. The authors also found that infants and toddlers in families whose TANF benefits had been reduced also had 50 percent greater odds of being food insecure, and 182 percent greater odds of being admitted the day of an ED visit, than those of children in families whose benefits had not been reduced. We also found that receiving food stamps did not mitigate the associations of losing TANF benefits with these health outcomes. In a study examining associations between participation in the Special Supplemental Nutrition Program for Women, Infants, and Children (WIC) program and indicators of underweight, overweight, length, child's health status, and food security in children aged 12 months or less, infants that did not receive WIC benefits because of access problems were more likely to be underweight, be short, and perceived as having fair/poor health than were WIC recipients, after adjusting for possible confounders. Similar findings have emerged in evaluating the association between a family's participation in the Low-Income Home Energy Assistance Program (LIHEAP) and the anthropometric status and health of their young children. LIHEAP is the nation's primary assistance program for helping low-income families having difficulties affording energy payments. Recent trends in energy and food price increases indicate that this 'heat or eat' threat to child health, growth, and development is likely to increase in the future.

Keywords: Cash assistance programs, Children health, US

**Dhami, R.S., Squires, J., Modood, T. (2006). 'Developing positive action policies: learning from the experiences of Europe and North America'. DWP Research Report 406. London, UK: Department for Work and Pensions, Corporate Document Services. Available at: <http://www.dwp.gov.uk/asd/asd5/rports2005-2006/rrep406.pdf>**

The aim of this study was to review positive action labour market policies in Europe and North America. Additionally to explore how these policies were implemented and identify which organisations were involved in the development and implementation of these policies.

The aim was also to establish whether these policies have been deemed successful in improving ethnic minority employment rates and social mobility. For this purpose the policies in Canada, the US, Northern Ireland and The Netherlands are considered. The evidence from this research has shown that there can be clear benefits from a programme of positive action. Existing policy approaches have been limited in redressing persisting ethnic penalties. In our view, a government committed to eradicating social exclusion can





legitimately and confidently engage with an advanced programme of positive action, which includes contract compliance. More specifically, on the basis of their research, they argue that:

- The introduction of proactive equality instruments accompanied by the political will to bring about social change can have an observable impact on employment equity.
- The rationale for the policies should appeal to an over-arching liberal democratic culture and respect for diversity and should be able to win broad support both amongst the targeted groups
- The rationale for these policies should also embrace the business case for employment equity.
- Both the liberal democratic and the business rationale need to be clearly articulated in a coherent communications strategy.
- Detailed statistical data is needed to pinpoint which groups require positive action and to evaluate the impact of programmes
- The experience from the USA (and to a lesser extent Canada) suggests that contract compliance is an effective positive action policy,
- The experience of the Netherlands suggests that the small-scale direct approach adopted for the Covenants that facilitate co-ordination between employers with vacancies and labour exchanges with access to ethnic minority jobseekers can increase ethnic minority employment rates.
- In addition to being clearly and coherently explained and defended, positive action policies need to be backed up by robust enforcement mechanisms if employers are to comply.
- The experience from the USA suggests that the creation of availability indices is an important mechanism for establishing who is qualified and potentially available for work.
- The experiences of the USA and Canada suggest that the creation of an institution responsible for overseeing contract compliance programmes is crucial for the effective implementation of the policy.
- The implementation of a contract compliance programme needs to be well resourced.
- The policies also need to be bureaucracy-light if employers are to embrace the scheme with any degree of enthusiasm.
- Positive action programmes should be regularly reviewed in relation to effectiveness, business efficiency and fairness.



- Ethnic minority education and job skills levels need to be addressed.
- Positive action programmes should consider both religious and ethnic minority equality measures.

Keywords: Positive action labour policies, Ethnic minority, Canada, Northern Ireland, Netherlands , US, UK

**Dench, S., Hillage, J., Coare, P. (2006). 'The impact of learning on unemployed, low-qualified adults: A systematic review'. DWP Research Report 375. London, UK: Department for Work and Pensions, Corporate Document Services. Available at: <http://www.dwp.gov.uk/asd/asd5/rports2005-2006/rrep375.pdf>**

This paper presents a systematic review of analyses of learning interventions on low qualified, out of work adults across a range of countries including France, the US and the UK. The authors note that tackling the low skills of parents is seen as one way of addressing child poverty and intergenerational disadvantage. The paper is based on 16 papers analysing 12 studies. The authors considered the Impact of the interventions on Employment, Earnings, Qualification and Skills, and 'Soft outcomes' (such as self confidence and self belief). Eight studies explored whether the chances of obtaining employment improved following a training intervention. All showed some positive impact. However, this does not provide as conclusive a picture as it might seem on first impression. For some of these studies it is difficult to isolate the specific impact of learning. A few also looked beyond immediate movement into employment with mixed results. Five studies reported the impact of programme participation on earnings. The findings also are mixed. A group of highly rated evaluations of welfare-to-work in the USA did find a statistically significant impact on the earnings of participants compared to the control group. However, this varied between different types of programme. Programmes placing more focus on job search and obtaining work, rather than largely focusing on learning were found to have a stronger impact on earnings in the shorter term. After five years, those on learning-focused programmes were beginning to catch up with those on employment-focused ones. Seven studies reported some findings on the impact of learning on the qualifications or skills of participants. All found a positive impact on participants with no prior qualifications, in that they were likely to obtain qualifications because of the intervention. Soft outcomes were discussed in two studies. In particular, self-confidence, belief in their abilities and potential and improved employability skills were reported. A series of reports from the USA found that 'employment-focused' programmes were more successful in terms of employment outcomes for low qualified participants, than 'education-focused' programmes. Interventions with employer-placements and work-based training were more successful in leading to employment outcomes. These interventions put participants in contact with employers and help develop more general employability skills, as well as enabling the individuals concerned to demonstrate work experience to potential employers. Various interventions also included help with job search



and this was concluded to be very important. Some interventions were providing broader based support to help participants with more general problems. It was found training has a role to play in helping low-qualified, out-of-work adults into employment, but that other factors are important, including work experience, job search, broader support and advice structures.

Keywords: Learning interventions, Out of work adults, Child poverty, Intergenerational disadvantage, UK, US, France

**Duggan, M., Kearney, M. (2005). 'The impact of child SSI enrolment on household outcomes: evidence from the survey of income and program participation'. NBER Working Paper 11568. Cambridge, MA: National Bureau of Educational Research. Available at: <http://www.brookings.edu/views/papers/200508kearney.pdf>**

Between 1989 and 2005 the number of children receiving disability benefits from the Supplemental Security Income (SSI) program in the U.S. increased from 0.26 million to 1.03 million. We utilize longitudinal data from the Survey of Income and Program Participation (SIPP) to estimate the effect of child SSI enrolment on total household income and the separate components of income, including earnings and transfers. The data suggest that child SSI enrolment has little effect, if any, on average household earnings and that it leads to an increase in total household income of roughly the same magnitude as the increase in transfer income. The data further suggest that child SSI participation leads to a significant and persistent reduction in the probability that a child lives in poverty. We also investigate the impact on family structure and health insurance coverage. The data do not suggest an effect on the probability that a child lives with either parent. While children on SSI are eligible for health insurance through Medicaid, the program has little impact on health insurance coverage because most new recipients have health insurance from Medicaid or another source at the time of enrolment. The estimated effects of child SSI enrolment vary substantially depending on whether the household was receiving benefits from the AFDC/TANF program at the time of the SSI award. Our results take on additional significance when one considers that there are now more children living in households with one or more SSI recipients than in households with one or more members on TANF.

Keywords: Supplement Security Income, Household earnings, Children, US

**Frist, W.H. (2005). 'Overcoming Disparities in U.S. Health Care'. *Health Affairs*, 24 (2). Available at: <http://healthaff.highwire.org/cgi/content/abstract/24/2/445>**

In 2004 W.H. Frist introduced comprehensive bipartisan legislation intended to eliminate health disparities. The Closing the Health Care Gap Act of 2004 (S. 2091) builds on the Minority Health and Health Disparities Research Act of 2000.<sup>20</sup> It addresses disparities by focusing on five key areas: (1) improving the quality of health care; (2) expanding access to



high-quality care; (3) strengthening national efforts and coordination; (4) helping increase the diversity of health professionals and promoting more aggressive health professional education intended to reduce barriers to care; and (5) improving research to identify sources of racial, ethnic, and geographic disparities and assess promising intervention strategies.

Keywords: Health disparities, Legislation, US

**Gray, R., Francis, E. (2006). 'The implications of US experiences with early childhood interventions for the UK Sure Start Programme'. *Child-care, health and development*, 33 (6), 655–663.**

In this paper, which is a focused, narrative review, the authors examine US experience with large-scale, early childhood interventions, in order to identify issues likely to face the UK Sure Start Programme as it expands. The early childhood intervention programmes aim to promote children's physical, social and cognitive development and their physical health. They generally involve co-ordinated, multidisciplinary provision of health, educational and social services to families with pre-school children. In the USA, the best known and largest such programme is Head Start. Head Start is a federally funded programme and is targeted at low-income, pre-school children from the age of 4 years, while Early Head Start is aimed at children aged 0–3 years. Head Start (and Early Head Start) provided the models for Sure Start. Head Start has been operating since 1965 and Early Head Start was initiated in 1994. The original objective of Head Start was to make it possible for disadvantaged children to begin formal schooling on a par with their peers, by means of a comprehensive programme to meet their emotional, social, health and psychological needs (Schrag *et al.* 2004; Vinovskis 2005). Head Start began as a summer programme, serving 561 000 children in the first year, and then expanded into a 9-month long programme, serving 733 000 children in 1966. Numbers of children enrolled fell somewhat in the 1970s and then rose again in the 1980s and 1990s. In 2004, 905 851 children were enrolled (Department of Health and Human Services 2004). Early Head Start was established in 1994 as an extension to Head Start, in response to the growing body of evidence about the critical nature of the period from birth to the age of 3 years for later development. The Programme has several objectives, viz. to enhance children's social, emotional and cognitive development, to improve parenting and to help parents meet their own goals, including economic independence (Kamerman & Kahn 2004). Services include early education, at home or at a centre; home visits; parent education and health services, both antenatal and after birth; nutrition; case management and peer support. Head Start explicitly identifies community development as a central component of effective intervention (Kamerman & Kahn 2004). Early Head Start currently provides services for pregnant women and children under 3 years old in 63 000 low-income families - about 3 percent of eligible families. Funding comes mainly from the federal government, supplemented by state funding. Both Head Start and Early Head Start are widely considered to be successful. Longitudinal research suggests that the long-term effects of Head Start on participants have been positive and significant, while Early Head Start has



had significant positive impacts on key developmental indicators and on parents. These findings provided some of the impetus behind the Sure Start Programme. These US programmes differ from early childhood programmes elsewhere in the Organization for Economic Cooperation and Development. Like Sure Start, they can be seen as an intermediate approach between that adopted in a number of European countries, such as France, Denmark, Finland and Sweden, which offer programmes aiming at universal coverage, sometimes with reduced fees or no charge for children from low-income households, and countries such as Australia and Canada, where childhood programmes targeted at poor children have recently been adopted by several state or provincial governments, but are still small-scale, with uneven coverage (Kamerman 2000; Vimpani 2000; Friendly 2004; Oberklaid 2004). Sweden's experience suggests that large-scale, rapidly expanding early childhood interventions may face issues around funding and maintenance of quality; balancing fidelity to models with flexibility to local conditions; the potential for conflict between a commitment to parental empowerment and a 'deficit' model of the poor and, lastly, around differential impact.

**Keywords:** Early intervention, Health inequalities, Health promotion, Poverty, Pre-school children, Sure Start

**Greenberg, M. (2007). 'Next Steps for Federal Child Care Policy'. *The future of children* 17 (2). Available at:**  
[http://muse.jhu.edu/journals/future\\_of\\_children/v017/17.2greenberg.pdf](http://muse.jhu.edu/journals/future_of_children/v017/17.2greenberg.pdf)

The author describes the tax and block grant provisions, which are the two main components of federal child care policy in the US. The tax and block grant provisions differ in eligible population, type of care paid for, amount of assistance, delivery mechanism, and virtually every other policy dimension. The major federal tax provisions relating to child care are the Child and Dependent Care Tax Credit (CDCTC) and exclusions from income for benefits under dependent care assistance programs (DCAPs). The CDCTC is a tax credit for a portion of child and dependent care expenses for children under age thirteen or for dependents of any age who are mentally or physically unable to care for themselves. In 2005, a total of 6.3 million tax units claimed the CDCTC with an average benefit of \$529. The CDCTC cost \$2.7 billion in 2006. The CDCTC is not refundable: a family's credit cannot exceed the amount of its income tax liability. As a result, the credit provides almost no benefit to lower-income families. In 2005, families with incomes below \$20,000 received an estimated 0.6 percent of CDCTC benefits, while two-thirds of the benefits went to families with incomes exceeding \$50,000. A single parent paying for child care for two children would not benefit from the credit unless her earnings reached about \$21,500. Dependent care assistance programs allow an exclusion from taxable income for employer contributions toward child and dependent care benefits. The DCAP structure provides little or no benefit to lower-income families. Because it allows only an exclusion from taxable income, families with no tax liability receive no benefit from the provision. The largest source of federal child care



subsidy funding for low-income families is the Child Care and Development Fund (CCDF). CCDF involves a complex mix of federal and state funding. A state can also transfer up to 30 percent of its Temporary Assistance for Needy Families (TANF) funds to its CCDF program. It must spend most of its CCDF funds on subsidy assistance for families with incomes below 85 percent of state median income. A state must also spend at least 4 percent of its CCDF funds to promote the quality of child care. Under the federal requirements, families must have the option of receiving a voucher that can be used with an eligible provider, and state policies and requirements cannot expressly or effectively exclude any category of care or type of provider. Federal law also provides that state payment rates must be sufficient to ensure 'equal access' to child care services comparable to those provided to families not eligible to receive child care assistance under CCDF or other programs. Most CCDF assistance (85 percent in 2005) is delivered through vouchers. The TANF block grant is the other principal federal source of low-income child care assistance. A state's TANF grant may be used for cash assistance for low income families and a wide array of other benefits and services. A state may 'directly spend' an unlimited amount of TANF funds for child care for 'needy' families— that is, families that meet the state's definition of low-income. The Department of Health and Human Services has estimated that 2.2 million children were assisted through CCDF, TANF, and a small amount of Social Services Block Grant funding in 2005, down from a peak of about 2.45 million children earlier in the decade. Those children represent a small share of the 15.7 million children who were eligible for CCDF assistance in federal fiscal year 2000.

Keywords: Tax benefits, Block grants, Childcare, Low-income families, US

**Greenstein, R. (2005). 'The earned income Tax Credit: boosting employment, aiding the working poor'. Washington, DC: Centre on Budget and Policy Priorities.**

**Available at:** <http://www.cbpp.org/7-19-05eic.pdf>

The author analyses the impact of the Earned Income Tax Credit (EITC) on the employment of the working poor in the US. An innovative tax credit was established in 1975 for low-income working families and has long enjoyed bipartisan support, the Earned Income Tax Credit has been found to produce substantial increases in employment and reductions in welfare receipt among single parents, as well as large decreases in poverty. A substantial body of research has been conducted on the EITC over the past decade, including numerous studies of its effect on employment. Only people who work are eligible for the EITC, and for workers with very low earnings such as those who work less than full time, the size of the credit increases with each additional dollar of earnings, providing an incentive for more work. The research, which includes studies by some of the nation's leading labour economists, finds that the EITC has had a powerful effect in substantially increasing the proportion of single mothers who work. In two published studies, Meyer and Rosenbaum found that the EITC expansions instituted between 1984 and 1996 were responsible for more than half of the large increase in employment among single mothers during that period. They also found





that the most significant gains in employment traceable to the EITC were for mothers with young children and mothers with low education levels. Economists Stacy Dickert, Scott Houser, and John Scholz estimated that expansions of the EITC between 1993 and 1996 induced more than a half a million families to move from welfare (AFDC cash assistance) to work. Jeffrey Grogger concluded that the EITC may be the single most important policy for explaining recent increases in work and earnings and declines in receipt of cash welfare assistance among female-headed families. Census data show that in 2003, the EITC lifted 4.4 million people out of poverty, including 2.4 million children. Without the EITC, the poverty rate among children would have been nearly one fourth higher. The EITC strongly complements the minimum wage. For several years after the EITC expansions of 1990 and 1993, the combination of the EITC, the minimum wage, and food stamps met the goal of ensuring that a family of four with a full-time minimum-wage worker would not have to raise its children in poverty. This goal cannot be met by the minimum wage alone. This is one reason why a broad array of policymakers has supported achieving the goal through the combination of the EITC and food stamps, which do not increase costs to employers and thus do not risk causing job losses, and the minimum wage. Research shows that many families that receive the EITC use it to pay for basic necessities like housing, utilities, food, and basic household appliances. The research also suggests that some families use their EITC to make purchases or investments that can help them maintain their jobs and their homes or to improve their employability so they have a better chance of moving into the middle class.

Keywords: Earned Income Tax Credit, Low-income families, Employability, US

**Halle, T., Calkins, J., Berry, D., Johnson, R. (2003). 'Promoting language and literacy in early childhood care and education settings'. *Child Care & Early Education Research Connections*. Available at:**  
<http://www.childcareresearch.org/SendPdf?resourceId=2796>

The authors describe various initiatives of US government to provide programs and policies enabling young children's education. The early childhood years are crucial for laying a foundation for learning to read and write (Whitehurst & Lonigan, 2002). Studies have revealed stability from children's skills at school entry to later academic outcomes, and children who enter school with poor language and other pre-reading skills can have a hard time ever catching up (Kurdek & Sinclair, 2000; La Paro & Pianta, 2000; Reynolds & Bezruczko, 1993). Furthermore, experiences at home and in child care and other early childhood classroom settings contribute significantly to young children's language and emergent literacy abilities. Current policy initiatives incorporate early language and literacy as a central component.

Good Start, Grow Smart intends to reinforce early learning opportunities and promote early school success through its efforts to:



- Strengthen Head Start by ensuring that centers meet standards of learning in early literacy, language, and numeracy
- Help states, in coordination with the Child Care Bureau, to develop Child Care and Development Fund State Plans describing voluntary quality criteria and guidelines for emergent literacy and language activities, professional development plans, and coordination of early childhood programs
- Conduct public awareness campaigns targeting parents, child care providers, and other early childhood educators to provide information on early childhood development

Additionally there are programs such as No Child Left Behind Act Reading First and Early Reading First and Preschool Curriculum Evaluation Research Grants Program (PCER) awards grants to support rigorous, random assignment evaluations of well-articulated, well-implemented preschool curricula.

Keywords: Early childhood education, Policy initiatives, US

**Holl, D.B., Kolovich, L. (2007). 'Evaluation of the prisoner re-entry initiative: interim report'. Bethesda, MA: Coffey communications LLC for Department of Labour Employment and Transport Administration. Available at:**  
[http://wdr.doleta.gov/research/FullText\\_Documents/PRI%20Eval%20Interim%20Report%20-%20%206%20D11%20D08%20E.pdf](http://wdr.doleta.gov/research/FullText_Documents/PRI%20Eval%20Interim%20Report%20-%20%206%20D11%20D08%20E.pdf)

This interim report, the first major product of the evaluation effort, is an analysis of the early implementation experiences of the U.S. Department of Labor (USDOL) and the Prisoner Re-Entry Initiative (PRI) grantees. Its purposes are to identify the principal program services provided by the projects, describe the degree and form of cooperation with key partners, and identify the primary challenges encountered by project sites. As part of a presidential initiative to reduce recidivism and the societal costs of reincarceration by helping inmates find work when they return to their communities, the USDOL, Employment and Training Administration (ETA) joined the Departments of Justice (USDOJ), Housing and Urban Development (HUD), Health and Human Services (HHS), and other federal partners to create a demonstration program— the PRI. The initiative seeks to strengthen urban communities affected by large volumes of returning prisoners through employment-centered projects that incorporate job training, housing referrals, mentoring, and other comprehensive transitional services. Although it is designed to offer ex-offenders a comprehensive array of services to meet their diverse needs, this initiative is based on the core premise that helping ex-offenders find and maintain stable and legal employment will reduce recidivism. Grantees are limited in terms of the individuals they may serve and the services they may support with USDOL funds. To be eligible for project services, individuals must be 18 years of age or



older, have been convicted as an adult and imprisoned pursuant to an Act of Congress or a state law, and have never been convicted of a violent or sex-related offense. Grant funds may be used for counseling and case management, job placement assistance, basic skills training and remedial education, occupational skills training, mentoring, and supportive services. Considering the scope of the challenge that the grantees accepted in applying for funds to operate prisoner re-entry projects, most of the sites made significant strides toward establishing employment-centered, re-entry projects for ex-offenders. Delays, unanticipated obstacles, and red tape affected most projects in at least one aspect of their undertaking. Nonetheless, sites were largely operational at the times of the site visits, had most aspects of their basic program under operation, and were actively seeking ways to improve their processes and outcomes.

- Grantees with more organisational resources at their disposal and those with prior experience in providing prisoner re-entry services typically experienced fewer problems during the start-up phase.
- Grantees were challenged by the PRI eligibility requirements
- To carry out the holistic role envisioned in the Solicitation for Grant Applications, most projects would have to enhance their practices related to participant assessment and case management.
- Most PRI training involves pre-employment skills, with little basic/remedial education and occupational skills training taking place.
- Relationships that would allow participants in need of substance abuse treatment, mental health services, and other health services to access such services are generally not well-developed.

Keywords: Prisoner Entry Initiative, Ex-convicts, Employment, US

**Ludwig, J., Mayer, S. (2006). “Culture’ and the Intergenerational Transmission of Poverty: the prevention paradox’. *The future of children*, 16 (2).**

Policy proposals to reduce the intergenerational transfer of poverty focus on three broad areas: schools, neighbourhoods’, and families. We briefly discuss research on the relationship between children’s neighbourhoods and their economic success as adults before turning to the role of families, particularly the relationship between parents’ marital status, work, and religion and their children’s chances of being poor as adults. The influence of neighbourhoods on many childhood outcomes may be surprisingly modest, at least according to available data from the U.S. Department of Housing and Urban Development’s Moving to Opportunity (MTO) demonstration. The MTO program overcomes the self-selection problem by randomly assigning low-income, mostly minority families into groups that are offered different forms of treatment. It thereby creates substantial differences in



neighbourhoods among otherwise comparable groups of poor parents and children. Although evaluations of MTO after four to seven years find that moving to less disadvantaged communities reduces risky and criminal behaviour in girls, they find that such moves on balance increase these behaviours in boys and have no detectable effects on children's academic performance, such as achievement test results or the chance of dropping out of high school.<sup>7</sup> It is possible that the benefits of moving away from very disadvantaged neighbourhoods may become greater over time, or that the benefits may be more pronounced among children who were very young when they moved. But there is as yet no strong evidence that moving poor families to less disadvantaged areas will substantially change children's life chances. Policymakers who encourage religion or religiosity among parents as a way to help children avoid poverty in adulthood believe that the moral content of religion leads both children and parents to behave in ways that promote children's future economic well-being. Right now, the main policy mechanism for encouraging religion or religiosity seems to be public funding for religious organisations to provide social services. Religious groups have always played an important role in aiding the poor in the United States, although that support has historically been mostly separate from government aid. The federal government's direct support of religious social services started with the 'charitable choice' measures signed into law by President Clinton between 1996 and 2000 to keep religious organisations from being excluded from competition for federal funds simply because they are religious.<sup>20</sup> President George W. Bush's 'faith-based initiative' aims to expand the ability of faith-based organisations to compete for federal funding. Two studies estimate the relationship between parents' religious denomination and children's adult income. One, by Nigel Tomes, finds that parental religious denomination has no effect on children's income as adults once parental education is accounted for.<sup>23</sup> The other, by Todd Steen, finds that net of their own education and labour market experience, adult sons raised in Jewish and Catholic homes earn more than children raised in Protestant homes, and that adult children raised in families with no religious affiliation earn about the same as those raised in Protestant homes.

Keywords: Intergenerational transfer of poverty, Children, Neighbourhoods, US

**Meyers, M.K., Gornick J.C., Peck L. R., Lockshin A. J. (2001). 'Public policies that support families with young children: variation across US states'. In Vleminckx, K., Smeeding, T.M.. *Child Well-being, child poverty and child policy in modern nations*, 433-459. Bristol, UK: The Policy Press.**

The aim of the study was to fill the gap in the US cross-state literature with a particular emphasis on the package of policies that enhance families' resources. The author mentions three types of promising government's assistance to improve children's lives. Those are cash and near-cash transfers, tax policies, non-cash transfers and services. Important was also how the state provided benefits – who was eligible, whether benefits were generous and how were the programmes administered. Those three were defined by characteristics such as



adequacy – the level of benefits, inclusion- who is eligible and commitment – the range and quality of assistance. The data selection was based on the criteria of programmes and policies which affected families' resources by increasing incomes. Secondly the programmes selected had public component in both financing and delivery. Comprehensive data was available for the year 1994. Overall there were 31 dimensions of policy efforts. The analysis was through cluster method which captured multiple elements of policy variation across multiple programmes. The states were regrouped in the clusters depending on underlying problems and expansiveness of solutions. In the state clusters with the highest need child poverty rates varied from 29 percent in the states providing minimal support to 20 percent in the ones providing generous support. In the state clusters with lower child poverty, it varied from 17 percent for states with conservative support to 15 percent for states with integrated support. It is concluded that the benefits package is only weakly linked to the families' needs and that expensiveness of this package is associated with lower levels of poverty in both high and low level poverty states.

Keywords: Families' resources, Poverty, Children, US

**Micklewright, J. (2002). 'Social Exclusion and children: A European View for a US Debate'. Innocenti Working paper 90. Florence, Italy: UNICEF Innocenti Research Centre. Available at: <http://www.unicef-irc.org/publications/pdf/iwp90.pdf>**

The author analyses the concept of social exclusion and children in the EU and potential applicability of the terms in the US context. The first part analyses the definition of social exclusion and children and shows how imprecisely it is defined even though widely debated. In the UK and EU the analysis is through statistics representing different combinations of conditions such as poverty line and household standard of living. The author points out to the unsatisfactory inclusion of processes affecting children's exclusion. The debate should focus on three levels: relativity, agency and dynamics. Some problems arising while defining children's exclusion are: how to define the reference group – on the national, sub-national or neighbourhood level?; how to measure their exclusion – what they actually do and consume and therefore what they may be lacking?; who excludes children – parents, schools, employers, other children, governments or themselves? The second part of the paper analyses the social exclusion debate in the US. The term itself doesn't appear in the political debate even though the data collected on the subject of dynamics of childhood poverty is far greater than in the EU. If the debate on social exclusion of children would take place in the US it would have to take into consideration a few factors: the political context and the usage of 'exclusion' vs. 'inclusion'; national vs. state level of comparison; how historically the issue of social exclusion has been seen and dealt with and overall dynamics of child poverty in the US. The US approach so far is seen as having focused more on dynamics but less on relativity and agency factor. For the US and EU debate on social exclusion of children it is necessary to have a more precise and applicable definition of the subject.

Keywords: Social exclusion and children, Childhood poverty, UK, EU, US



**Mills, G., Gale, W.G., Patterson, R., Engelhardt, G.V., Eriksen, M.D., Apostolov, E. (2008). 'Effects of individual development accounts on asset purchases and saving behavior: Evidence from a controlled experiment'. *Journal of Public Economics*, 92, 1509–1530.**

This paper evaluate the first controlled field experiment on Individual Development Accounts (IDAs). Including their own contributions and matching funds, treatment group members in the Tulsa, Oklahoma program could accumulate \$6750 for home purchase or \$4500 for other qualified uses. Individual development accounts (IDAs) are saving accounts that provide low-income households with matching payments when the balances are withdrawn and used for special purposes, such as home purchase, business start-up, and investment in education. IDA programs also frequently provide participants with financial education and counseling, as well as reminders and encouragement to make regular contributions. Originally developed by Sherraden (1991), IDAs aim to help low-income households by subsidizing and otherwise encouraging the purchase of qualified assets — defined broadly to include financial instruments, housing, business ownership, and human capital — in contrast to more traditional approaches that emphasize income support. Almost all treatment group members opened accounts, but many withdrew all funds for unqualified purposes. Among renters at the beginning of the experiment, the IDA increased homeownership rates after 4 years by 7–11 percentage points and reduced non-retirement financial assets by \$700–\$1000. The IDA had almost no other discernable effect on other subsidised assets, overall wealth, or poverty rates.

Keywords: Individual Development Accounts, Savings, Low-income households, US

**Murnane, R.J. (2007). 'Improving the education of children living in poverty', *The Future of Children*, 17 (2). Available at:**  
[http://www.futureofchildren.org/usr\\_doc/7\\_08\\_Murnane.pdf](http://www.futureofchildren.org/usr_doc/7_08_Murnane.pdf)

Beginning with the Elementary and Secondary Education Act of 1965, a major focus of federal education policy has been improving the education of disadvantaged children. No Child Left Behind is the latest federal effort to reach the goal of equal educational opportunity. The new law requires states to test annually the reading and mathematics skills of all public school students in grades three through eight. It also specifies that all schools are expected to make adequate yearly progress (AYP) toward ensuring that all groups of students, including groups defined by race or ethnicity and poverty, reach proficiency within twelve years (by 2014). School districts and schools that fail to demonstrate adequate yearly progress for all groups of students are subject to corrective actions that can ultimately include the replacement of staff and school reconstitution. The new law is not without its strengths—most important, its focus on improving outcomes for children who have historically been poorly served by American schools. As is inevitable in such path breaking





legislation, the current version of NCLB has many flaws. These include unrealistic adequate yearly progress targets, and lack of different categories in its accountability system.

Keywords: Education, Disadvantaged children, Schools, US

**Office of Communications and Outreach (2007). 'Guide to US Department of Education Programs'. Washington, DC: US Department of Education. Available at:**  
<http://www.ed.gov/programs/gtep/index.html?src=fp>

This reference guide provides information about the U.S. Department of Education's programs and resources made available to state and local education agencies, institutions of higher education, other postsecondary institutions, public and private nonprofit organisations, individuals and others for fiscal year 2007. These include:

- Adult Education—Basic Grants to States
- Child Care Access Means Parents in School Program .
- Grants to States for Workplace and Community Transition Training for Incarcerated Youth Offenders
- Life Skills for State and Local Prisoners Program
- Early Reading First
- Even Start
- Reading First
- Striving Readers
- Early Intervention Program for Infants and Toddlers with Disabilities
- Preschool Grants for Children with Disabilities

Keywords: Education programs, US

**Parrott, S., Sherman, A. (2006). 'TANF at 10: Program results are more mixed than often understood'. Washington, DC: Centre on Budget and Policy Priorities. Available at:** <http://www.cbpp.org/8-17-06tanf.pdf>

The 1996 Personal Responsibility and Work Opportunity Reconciliation Act (PRWORA) established the Temporary Assistance for Needy Families (TANF) block grant. Under TANF, states received fixed block grants and had broad flexibility to design their own rules for their cash assistance programs, and broad authority to use the block grant resources for other programs outside of cash assistance to assist low-income families, promote marriage, and reduce non-marital childbearing. Many discussions of TANF focus on three sets of trends —



the decline in the number of families receiving cash assistance through TANF programs, the increase in employment rates of single mothers during the 1990s, and the decline in child poverty during the 1990s. While important, these three sets of trends miss important information about the functioning of the TANF program and the impacts on low-income families over the last decade. Examining a broader set of indicators reveals these important facts:

- Child poverty fell during the 1990s, but has increased significantly in recent years as has the number of children living below half the poverty line.
- Employment rates among single mothers are higher today than in the mid-1990s, but they have fallen since 2000.
- The number of poor single mothers who are jobless, do not receive cash public assistance (from TANF or other programs), and do not live with others who work or receive cash income support has increased significantly.
- TANF now helps a much smaller share of the families that are poor enough to qualify for the program than it used to.

Keywords: Temporary Assistance for Needy Families, Child poverty, Cash assistance, US

**Peck, J., Theodore, N (2001). 'Exporting workfare/importing welfare-to-work: exploring the politics of Third Way policy transfer'. *Political Geography*, 20 (4), 427-460.**

The paper presents a critical analysis of 'policy transfers' in the field of welfare-to-work or 'workfare' programming, focusing on recent experiences in the United Kingdom and the United States. While it has become something of a cliché that British welfare policy has been 'Americanised' in recent years, detailed analysis of the policy formation and development process around the Labour Government's New Deal programme for the young unemployed reveals that this has indeed been a sphere of intensive and multi-lateral policy transfers. This does not mean that some simple process of policy 'convergence' is underway, as the form and function of such policies is prone to change as they are translated and re-embedded within and between different institutional, economic and political contexts (at the local and national scales). While the turnover of the policy-making cycle seems to be accelerating in the field of welfare-to-work — as implementation schedules are intensified, as 'reform' becomes a systemic condition, and as extra-local policy learning and emulation is normalised — the effectiveness of policies and programmes remains stubbornly dependent on local economic and institutional conditions — as 'successful' programmes remain very difficult to replicate in other locations, as tendentially-decentralising policy regimes exhibit growing spatial unevenness, and as local labour market conditions continue to exert an inordinate influence on programme outcomes.

Keywords: Workforce, Policy transfer, Welfare reform, Labour market policy



**Richer, E., Kubo, H., Frank, A. (2003). 'All in one stop? The accessibility of Work Support Programs at one-stop centres'. Washington, DC: Centre for Law and Social Policy. Available at:**

[http://eric.ed.gov/ERICWebPortal/custom/portlets/recordDetails/detailmini.jsp?\\_nfpb=true&ERICExtSearch\\_SearchValue\\_0=ED481829&ERICExtSearch\\_SearchType\\_0=no&accno=ED481829](http://eric.ed.gov/ERICWebPortal/custom/portlets/recordDetails/detailmini.jsp?_nfpb=true&ERICExtSearch_SearchValue_0=ED481829&ERICExtSearch_SearchType_0=no&accno=ED481829)

The authors analyse the 'one stop' delivery system that makes an array of federally funded employment programs available at one location. This delivery system is required under the Workforce Investment Act (WIA) all local workforce areas in the US. These include Job search assistance, training, supportive services and employer services. Certain agencies are federally mandated partners for one-stop, including, WIA programs, Wagner-Peyser employment services, adult education and literacy, Welfare to work, older Americans act, Perkins postsecondary vocational education, Trade Adjustment Assistance, Veterans employment and training, community service block grant employment and training. A number of other important work supports are optional but non-mandatory partners, including those that administer Temporary Assistance for Needy Families (TANF), Food Stamps, Medicaid, childcare and child support. There is great variety amongst one-stop centres in all aspects of operations including resources and program accessibility. Close working with the TANF agency is an important aspect of access, particularly for such programs as publicly funded health insurance, food stamps and cash assistance. Rural one-stops tend to have fewer staff and resources, making it harder for them to offer access to many work supports.

Keywords: 'One stop' delivery system, Employment programs, US

**Schaefer, S.A., Kreader, J.L., Collins, A.M. (2006). 'Parent employment and the use of child care subsidies'. Child Care and Early Education Research Connections. Available at: <http://www.childcareresearch.org/location/8725>**

The authors analyse the impact of child care subsidies and parents' employment outcomes. Child care subsidies reduce child care costs for low income families and have two main goals: support for parents' employment and support for children's development. The primary federal funding source for child care subsidies is the Child Care and Development Fund (CCDF). CCDF, including funds transferred by states from the Temporary Assistance for Needy Families (TANF) program to CCDF, is a significant source of federal support to improve the affordability, supply, and quality of child care in the United States. CCDF assists low-income families, including families receiving or transitioning from TANF cash assistance, in obtaining child care so they can work, or at state option, attend training or education. States have wide discretion in defining employment and preparation for employment, as well as in setting income eligibility ceilings, family co-payment levels, provider payment rates, and other policies. Preliminary findings on the relationship between parents' use of child care subsidies and their employment outcomes include increased rates of employment and



improved employment outcomes for low-income mothers. While employment and subsidy use each influence the other, mothers who use subsidies appear more likely to work more hours at the same job within standard schedules and additionally they earn more money. Mothers using subsidies also appear more likely to return to work sooner after the birth of a child. Receipt of subsidies appears to be more strongly associated with increased or improved work for some groups of low-income mothers than others. Subsidies appear most likely to increase employment for the least educated women—those without high school degrees. Receiving care subsidies appears more strongly associated with the probability of working standard schedules for TANF mothers than for non-TANF mothers. Subsidies appear to be associated with greater increases in employment for single than for married mothers. Retail and service sectors of the economy are the most likely to employ women using subsidies. Child care subsidies are just one work support associated with mothers' employment decisions. Other policies and benefits—e.g. tax credits, cash assistance, medical insurance, food stamps—are also related.

Keywords: Child care subsidies, Lonely mothers, Employment, US

**Sherraden, M. (2003). 'Individual accounts in social security: can they be progressive?' *International Journal of Social Welfare*, 12 (2), 97–107.**

The trend toward individual asset accounts in social security, and the regressivity of these accounts provide the motivation for this article. The article asks: why not asset building for the poor as well? The author notes the reasons for regressivity of individual asset accounts are twofold: first, the poor often do not participate in asset-based policies that currently exist; and second, subsidies for asset based policies operate primarily through tax benefits (tax expenditures) that benefit the poor little or not at all. However, research on Individual Development Accounts in the United States finds that the poor can save when they have a structure and incentive to do so. Steps toward universal and progressive asset-based policy are pointed out in Singapore, the United States and the United Kingdom.

Keywords: Asset accounts, Poor, US

**Shields, M.K., Behrman, R.E. (2007). 'Children and welfare reform: analysis and recommendations'. *The future of children*, 12 (1).**

The authors analyse the changes brought for low-income children and their families by the passage of federal welfare reform law - the Personal Responsibility and Work Opportunity Reconciliation Act in 1996. Prior to reform, all children in poor families that met state eligibility criteria were entitled to assistance under the Aid to Families with Dependent Children (AFDC) program, although many states set the threshold so low that only the poorest families qualified. The federal government reimbursed states for at least half the cost of providing this assistance, with no cap on expenditures. AFDC receipt also assured ready



access to other benefits, such as Medicaid and food stamps. Families who participated in AFDC-related work programs were provided with child care assistance. Most mothers receiving AFDC payments stayed home and cared for their children themselves. Program structures, priorities, and funding streams all changed dramatically with passage of the 1996 law. The AFDC program was replaced with a block grant to the states called Temporary Assistance for Needy Families (TANF). Funding levels for TANF were based on states' historical expenditures under AFDC. Families' entitlement to assistance ended, and the links between cash assistance and other benefits and services were severed. Instead, the law gave states increased flexibility to design their own welfare programs and support services for low-income families. At the same time, the law's focus, as indicated by its title, was to increase parental responsibility and work, and a major theme was to move families off welfare and into employment. Thus, families receiving TANF cash assistance had to meet several important new rules, such as more stringent work requirements, sanctions for noncompliance, and time limits. The law also increased funding for child care to facilitate mothers' employment, and strengthened the child support enforcement program to help ensure that fathers would contribute to the support of their children. Two other key themes in the 1996 law were promoting marriage and reducing out-of-wedlock births. The law also called on the U.S. Department of Health and Human Services to establish a strategy for preventing out-of-wedlock teen pregnancies. The law changed benefits and services for low-income children in other ways as well. For example, it restructured two significant funding streams for prevention of child maltreatment and services to reunify families split apart by child abuse or neglect. The law also modified the definition of childhood disability, restricting children's eligibility for assistance from the Supplemental Security Income (SSI) program. Finally, the law restricted legal immigrants' eligibility for many services and benefits, including cash assistance, food stamps, and Medicaid. Some restrictions on legal immigrants have since been lifted, but most remain ineligible for food stamps, and those entering the country after passage of the law are ineligible for nearly all federal benefits for five years. The changes that resulted from the 1996 law could affect poor children in many ways, both directly and indirectly. For the most part, however, the underlying premise of the law was that children would benefit from seeing their parents leave welfare and go to work. Overall, low-income families have fared well since reform, both economically and structurally. Poverty rates have declined, and fewer children are being raised in single-mother households. The primary goal of the 1996 law was to end families' dependence on government benefits, and efforts to address this goal have been very successful. Bolstered by the strong economy of the 1990s and policies that help 'make work pay,' such as the earned income tax credit (EITC) and expanded health insurance programs for low-income children, many families moved off welfare and into jobs. Even in a strong economy, many families who left welfare were struggling, and many remaining on the rolls faced serious barriers to employment. What can be gleaned from the research about how low-income children are faring since welfare reform in terms of their economic wellbeing, family structure, and daily life experiences is summarised below.



Keywords: Personal Responsibility and Work Opportunity Reconciliation Act, Low-income families, US

**Sorensen, E., Hill, A. (2004). 'Single mothers and their child-support receipt: how well is child-support enforcement doing?' *Journal of Human Resources*, 39 (1), 135-154.**

This research finds that the expansion of the child-support enforcement system has significantly increased the child-support receipt rates of previously married and never-married mothers. The authors estimate that the child-support policies in the research model explain 34 percent of the increase in child-support receipt rates for previously married mothers and 45 percent for never-married mothers. The federal and state governments have spent considerable time and money during the past 25 years to build a strong child-support enforcement program so that single-parent families can depend on child support as a source of income. Even the most recent welfare reform effort in 1996 contained major changes in child support law. The gains are largely confined to two groups of single mothers—previously married mothers on welfare and never-married mothers off welfare. If the child-support policies in our model had not been enacted, the authors estimate that, in 2000, the child-support receipt rate would have been 12.5 percentage points lower for previously married mothers on welfare and 9.8 percentage points lower for never-married mothers off welfare. On the other hand, the child-support receipt rates of the other two groups of single mothers—previously married mothers off welfare and never-married mothers on welfare—were largely unchanged in 2000 as a result of the child-support policies in this analysis. These findings suggest that the 25-year expansion of the child-support program has achieved a great deal. Nonetheless, if Congress wants to increase the child support receipt rate of never-married mothers on welfare they may want to consider reinstating the federally mandated \$50 pass-through. In addition, they may want to consider other policies, besides child-support enforcement, to increase the child support receipt rates of never-married mothers on welfare, such as increasing the capacity of non custodial fathers to pay child support.

Keywords: Child support, Lone mothers, US

**Statham, J. (2004). 'Effective services to support children in special circumstances'. *Child-care, Health and Development*, 30 (6), 589-598.**

(see UK section)





**Thornton, C. (2007). 'Evaluation of the Ticket to Work Program: assessment of post-rollout implementation and early impact'. *Mathematica Policy Research*, May (1), 34.**

The authors analyse the Ticket to Work and Self-Sufficiency program (TTW) which was designed to enhance the market for services that help disability beneficiaries become economically self-sufficient. To do so, the program tries to give beneficiaries a wide range of choices for obtaining services and to give employment-support service providers new financial incentives to serve beneficiaries effectively. It also modifies the rules for the Disability Insurance (DI) and Supplemental Security Income (SSI) programs in order to give beneficiaries more incentives to participate. While getting these core elements in place represents a major accomplishment, the market has experienced several serious problems. Beneficiary participation rates have risen continuously since the early months of rollout but remain low relative to the number of beneficiaries who express interest in work. For example, between March 2004 and December 2004, the participation rate rose from 1.1 percent of eligible beneficiaries to 1.4 percent in the early implementing states (those included in the Phase 1 rollout) while 26 percent of disability beneficiaries see themselves working for pay in the next five years and 15 percent see themselves earning enough to stop receiving benefits. Early impact results suggest that TTW slightly increased beneficiary use of employment services in the first rollout year (2002). That small service use increase, however, does not appear to have produced an increase in average beneficiary earnings or a reduction in benefit payments in the first two years (2002 through 2003). Such changes may have occurred, but, if they did, they were too small for us to confidently attribute them to the TTW program given available data and the historical state-level variation in these outcomes. Impacts for 2004 and later may be larger. Payment data show that some beneficiaries who assigned their Tickets before 2004 earned enough income to generate Ticket payments only after the end of 2003, and survey data show that many participants in 2003 expected to earn enough to leave the rolls. Participation rates continue to increase, and many nonparticipants say that they plan to assign their Tickets. Economic growth since 2003 might also help participants attain greater employment success.

Keywords: Ticket to Work, Disability beneficiaries, Employment, US



**US Department of Education (USDoE) (2008). 'Bridges to opportunity: Federal adult education programs for the 21<sup>st</sup> century'. Washington, DC: US Department of Education Office of Vocational and Adult Education. Available at: <http://www.ed.gov/about/offices/list/ovae/eo13445.pdf>**

This report summarises some of the key federal adult education programs currently available in the US, these include:

*U.S. Department of Defense—National Guard Youth ChalleNGe Program*

ChalleNGe is a coeducational program for 16–18-year-old high school dropouts, who also must be drug-free and not in legal trouble. The ChalleNGe model focuses on core components that together improve skills and facilitate personal growth. The program consists of a 22-week quasi-military residential phase, followed by a 12-month post-residential phase. Participants attend daily classes to prepare for a GED or high school diploma and to increase mathematics skills and reading comprehension during the residential phase.

*U.S. Department of Education—AEFLA State-Administered Grant Program*

The AEFLA State-Administered Grant Program provides educational opportunities for adults ages 16 and older who are not currently enrolled in school or required to be enrolled under state law and who lack high school credentials, basic skills, or the abilities needed to function effectively in their workplaces or in their daily lives.

*U.S. Department of Education—Migrant Education High School Equivalency Program*

The purpose of the Migrant Education High School Equivalency Program is to help migrant and seasonal farm workers (and their children) 16 years of age or older and not currently enrolled in school to obtain the equivalent of a high school diploma and, subsequently, to gain employment or begin postsecondary education or training.

*U.S. Department of Justice, Federal Bureau of Prisons—Industries, Education, and Vocational Training Program*

The Industries, Education, and Vocational Training Program is responsible for education and job training in federal prisons. Each prison has an education department that provides educational services to inmates. Services include occupational training programs, parenting programs, and adult continuing education classes designed to increase inmates' general knowledge in a wide variety of subjects, including reading and mathematics. Programs help inmates improve their English literacy skills, earn GEDs, and obtain job skills.

*U.S. Department of Labor—Job Corps*

Job Corps is the nation's largest primarily residential training program that serves 16–24-year-old economically disadvantaged youths who are U.S. citizens or legal residents and



who face barriers to employment. The program operates 122 centers nationwide offering students, at no cost, intensive training in skills needed to become employable and independent. They enroll in Job Corps to earn a high school diploma or GED or learn a trade. They also receive assistance with placement in meaningful jobs or further education.

*U.S. Department of Labor—Workforce Investment Act Programs*

Three formula programs authorized under the Workforce Investment Act of 1998 (WIA)—Adult, Dislocated Worker, and Youth—are designed to provide high-quality employment and training services to eligible adults and youths to help them find and qualify for meaningful employment and to assist employers with finding the needed skilled workers. The WIA Adult and Dislocated Worker Programs provide core, intensive, and training services. Core services include outreach, job search and placement assistance, and the provision of labor market information.

*U.S. Department of Labor—YouthBuild*

YouthBuild is an alternative education program for youths significantly behind their peer group in basic skills and in their progress toward a high school diploma or GED attainment. The program primarily provides services to at-risk youths, including out-of-school youths, those aging out of foster care, and those returning to society from a juvenile detention institution. Simultaneously, the program addresses core issues facing low-income communities: housing, education, employment, crime prevention, and leadership development.

Keywords: Adult education programs, US

**US Social Security Administration (US SSA) (2008). ‘Benefits for children with disabilities 2008’. Washington, DC: US SSA. Available at:**

<http://www.socialsecurity.gov/pubs/10026.pdf>

Supplemental Security Income (SSI) makes monthly payments to people with low income and limited resources who are 65 or older, or blind or disabled. Child under age 18 can qualify if he or she meets Social Security’s definition of disability for children, and if his or her income and resources fall within the eligibility limits. The amount of the SSI payment is different from one state to another because some states add to the SSI payment. Once child starts receiving SSI, the law requires that we review child’s medical condition from time to time to verify that he or she is still disabled. For disability purposes in the SSI program, a child becomes an adult at age 18, and different medical and non medical rules are used when deciding if an adult can get SSI disability payments. There is also Social Security Disability Insurance (SSDI) which benefits for adults disabled since childhood- The SSDI program pays benefits to adults who have a disability that began before they became 22 years old.



There are many ways to encourage young people who are receiving SSI payments or SSDI benefits and who want to go to work.

If a child is younger than age 22 and a student who regularly attends school more of his or her earnings each month are excluded. In 2008, disabled students younger than age 22 may exclude \$1,550 of their monthly earnings, with an annual limit of \$6,240, when counting their income for SSI purposes. These limits increase each year. With a Plan to Achieve Self-Support (PASS), a child who is age 15 or older can save some income and resources to pay for education and other things needed to be able to work. Because of a medical condition(s), child may need certain items and services in order to work, such as a wheelchair or a personal assistant. Child older than age 15 may get help with rehabilitation and training. An adult disabled before age 22 can get the same help with work expenses explained above for an SSI child, and help with rehabilitation and training. Cash benefits may continue until the individual can work on a regular basis. Medicare may continue for up to 93 months. Under Medicaid which is a health care program for people with low incomes and limited resources, in most states, children who get SSI payments qualify for Medicaid. When child gets SSI, parent will be referred to places where he can get health care services for his child. These services are under the Children with Special Health Care Needs provision of the Social Security Act. These programs are usually managed by state health agencies. States call these services by many different names, including Children's Special Health Services, Children's Medical Services and Handicapped Children's Program. Most Children with Special Health Care Needs programs help provide services through clinics, private offices, hospital-based outpatient and inpatient treatment centers, or community agencies.

Keywords: Social security income, Benefits, Disabled children, Employment, US

**US Social Security Administration (US SSA) (2008). '2008 Red Book'. Washington, DC: US SSA. Available at:**

<http://www.socialsecurity.gov/redbook/index.html>

One of the Social Security Administration's (SSA) highest priorities is to support the efforts of disabled beneficiaries who want to work by developing policies and services to help them reach their employment goal. To that end, the Social Security Disability Insurance (SSDI) and Supplemental Security Income (SSI) programs include a number of employment support provisions commonly referred to as work incentives. The Red Book is a general reference tool designed to provide a working knowledge of these provisions. The Red Book is written primarily for educators, advocates, rehabilitation professionals, and counselors who serve individuals with disabilities. We also expect that applicants and beneficiaries will use it as a self-help guide. The Red Book contains a general description of our disability-related policies. Some of the most important chapters and categories include:



#### Resources for employment supporters

- Area Work Incentives Coordinator (AWIC)
- Plan to Achieve Self-Support (PASS)
- Benefits Planning Query (BPQY)

#### Return to work planning & assistance

- Work Incentives Planning and Assistance Organizations (WIPA)
- Work Incentives Seminar (WISE) Events
- State Vocational Rehabilitation Providers
- Protection and Advocacy
- Disability Program Navigators
- EARN Works Job Seeker Network

#### Overview of SSA disability programs

- Social Security Disability Insurance Program
- Supplemental Security Income Program

#### Employment Support Overviews

- Ticket to Work Program
- Trial Work Period
- Extended Period of Eligibility
- Student Earned Income Exclusion
- Plan to Achieve Self Support
- Property Essential to Self Support
- Special SSI payments for individuals who work
- Reinstating SSI eligibility without a New Application
- Continued Payment under a Vocational Rehabilitation Program or Similar Program
- Expedited Reinstatement
- Continuation of Medicare coverage
- Medicaid Whilst working
- Medicare for Individuals with Disabilities Who Work

Keywords: Social security, Disabled beneficiaries, US



**Waldfogel, J. (2007). 'Welfare reforms and child well-being in the US and UK'. London, UK: Centre for Analysis of Social Exclusion (CASE). Available at:**  
<http://sticerd.lse.ac.uk/dps/case/cp/CASEpaper126.pdf>

(See UK section)





### 3 Other OECD countries

**Adshead, M., Millar, M. (2008). 'NAPS Policy and Process: What have we learned?' Research Working Paper Series. Dublin, Ireland: Combat Poverty Agency Poverty Research Initiative. Available at:**  
[http://www.combatpoverty.ie/publications/workingpapers/2008-02\\_WP\\_NAPSPolicyAndProcess-WhatHaveWeLearned.pdf](http://www.combatpoverty.ie/publications/workingpapers/2008-02_WP_NAPSPolicyAndProcess-WhatHaveWeLearned.pdf)

Using a 'new governance' framework, this paper charts the evolution of the Irish National Anti-Poverty Strategy (NAPS) and assesses the extent of change in policy institutions, the processes and performance, as well as looking at the implications that these hold for policy accountability and the role of the state in fostering social inclusion. The evolution and progress of the NAPS is assessed against the three-fold ambitions that NAPS was originally intended to achieve, namely: greater integration in policy initiatives involving cross-cutting departmental responsibilities; the introduction of 'poverty impact assessments' to all government initiatives and key policy areas; and, developing the participation of people living in poverty. It finds that for a variety of reasons, these objectives have been only partially achieved and that there is as much to be learned from a closer examination of the policy process associated with NAPS as there is from an evaluation of the policy outputs.

Keywords: Anti-poverty strategies, Social inclusion, New governance,, Ireland

**Baldwin, A., Stapleton, J., Drummond, D. (2008). 'New Asset and Income policies to assist low-income adults under Ontario's Poverty Reduction Strategy: Towards a comprehensive approach to accommodate new federal programs and encourage self-reliance under Ontario's asset and income tested benefit programs'. Ontario, Canada: TD Economics. Available at:**  
[http://www.td.com/economics/special/dd0708\\_poverty.pdf](http://www.td.com/economics/special/dd0708_poverty.pdf)

The paper makes recommendations for the Ontario province of Canada on how to harmonize social assistance policies along with the introduction of Tax Free Savings Accounts (TFSA) in 2009. The paper argues that asset tests should be modified to encourage self-reliance. The overall recommendation is to increase asset limits in needs tested programmes and to allow those assets to rise to a certain amount without tax back or recovery. It is recommended to increase asset limits to needs recipients to the amount of \$5,500 single and \$9000 couple, to exempt monies paid to TFSA and therefore lower Marginal Effective Tax Rates (METRs) and finally to allow TFSA redemptions to be spent on items promoting self-reliance. The authors also recommend that Canada introduce matching savings programs for low-income TFSA holders. Also other poverty reductions policies are suggested such as improved governance of social assistance programmes, programmes encouraging attachment to the workforce and leveraging of current asset building programmes.



Keywords: Tax free saving accounts, Assets and low-income families, Ontario, Canada

**Bertram, H. (2007). 'Overview of Child Well Being in Germany : Policy Towards a Supportive Environment for Children'. Innocenti Working Papers 2006-02. Florence, Italy: UNICEF Innocenti Research Centre.**  
**Available at:** <http://www.unicef-irc.org/cgi-bin/unicef/Lunga.sql?ProductID=465>

Children's opportunities to develop according to their talents and competencies and to establish trust in the adults with whom they live their neighbourhoods, kindergartens', schools and municipalities also crucially influence the future of the society in which they grow up. Yet, international comparisons have until recently centred on resource availability, material wellbeing and health outcomes. However, initiatives such as the OECD/PISA and WHO surveys of 'healthy lifestyles among school-aged children' have explored child well-being along several dimensions. Building on these surveys, the Innocenti Report Card No 7 (2007) 'Child Poverty in Perspective; An Overview of Child-wellbeing in Rich Countries' compares child wellbeing along six dimensions including material wellbeing, health and safety, educational well-being, family and peer relationships, behaviours and risk, and children's subjective sense of wellbeing.

The UNICEF framework is a starting-point for the present study of child well-being and development in Germany at the level of the individual state. The analysis reveals that child well-being differs across the States and along the various dimensions. The framework provides a more extensive understanding than is possible through attention to material factors or the school situation alone. Overall, however, child wellbeing appears to be more advanced in the western than the eastern regions of the country, and in the south compared to the north. On the basis of the analysis a series of policy recommendations may be identified for the federal states and the municipalities concerning dimensions of child wellbeing which deserves special attention in their particular regional context. The comparison also demonstrates that only limited data relevant for the (international) comparison of child wellbeing is available at the state-level for comparison in all six dimensions. Such information is necessary to enable a meaningful appreciation of the prospects for the country's future, through its children. This study attempts to contribute to an increased appreciation of the importance of children's well-being for the creation of the future of the society, at the level of the federal state, the states and the municipalities, suggesting as well possible directions for further research.

Keywords: Child well-being, Germany



**Buddelmeyer, H., Verick, S. (2007). 'Understanding the drivers of poverty dynamics in Australian households'. Melbourne Institute of Applied Economic and Social Research. Available at: <http://ftp.iza.org/dp2827.pdf>**

The authors examine the poverty dynamics in Australian households. They base their study on the longitudinal study of Australian households available from Household, Income and Labour Dynamics (HILDA) Survey and other studies such as Headey, Marks, and Wooden (2005) and Saunders and Bradbury (2006). The findings suggest that it is incorrect to assume that only certain households are prone to enter into poverty, what is more clear is the fact that household enter poverty only temporarily. Additionally, the longer the period in poverty, the higher chance of continuing life in poverty. Only 4 percent of all households remain in poverty for the period longer than 4 years. According to the authors, the implications of this study for the Australian policy makers are as follows: tertiary education and employment are key factors in keeping households out of poverty; having a disability increases the probability of becoming poor and remaining in such a situation; households in outer-regional or remote areas are more likely to become poor and continue to live under such hardship; and finally, life-changing events, especially becoming separated, can lead households into persistent poverty. The importance of longitudinal studies is crucial for the introduction of adequate policies preventing households from entry into poverty.

Keywords: Entering poverty, Poverty prone households, Australia

**Buddelmeyer, H., Freebairn, J., Kalb, G. (2006). 'Evaluation of policy options to encourage welfare to work'. MI Working Paper Series. Melbourne, Australia: Melbourne Institute. Available at: <http://melbourneinstitute.com/wp/wp2006n09.pdf>**

This paper compares five alternative policy options with the January 2006 tax and social security system. Each option is designed to cost a similar amount of 5 billion dollars to the government at the current level of labour supply. The five options are: reducing the lowest income tax rate, increasing the tax-free threshold, increasing the low income tax offset, decreasing all taper rates on own and partner's income for a number of allowances, and introducing an Earned Income Tax Credit. The criteria for comparison are the labour supply responses, the expected budgetary cost to the government after taking into account labour supply responses, the number of winners and losers from the policy change, the effects on the distribution of effective marginal tax rates, and the effect on the number of jobless households. From the results, it is clear that the option to reduce taper rates is dominated by the other options on all criteria. The other four options each have their advantages and disadvantages; no option scores best on all criteria.

Keywords: Social security systems, Labour supply responses, Australia



**Callan, T., Nolan, B., Walsh, J. R., Whelan, C. T., Maitre, B. (2008). 'Tackling low income and deprivation: developing effective policies'. Research Series 1. Dublin, Ireland: Economic and Social Research Institute. Available at:**  
<http://www.esri.ie/UserFiles/publications/20080617141815/RS001.pdf>

The study analyses various options of tackling poverty in Ireland. It examines welfare policies in other EU countries and focuses on the successful policies, which could be adopted in Ireland. The authors use SWITCH and ESRI tax-benefit models. The authors analysed the beneficial potential of raising the welfare package by 10 and 20 percent and incorporating structural changes. According to the authors the most beneficial package would incorporate a uniform rate of €230 per week, income-tested child benefit supplement and a reorientation of expenditure towards state pension. The impact of this package would reduce poverty from 16 to 10 or 11 percent. The success of this policy would also depend on the activation of welfare recipients. The study stresses the importance of the right balance between payment rates for pensions and other welfare payments. The analysis suggests that raising State Pension to the target level (by €300) as well as raising the other payments would be very beneficial to reduce 'at risk of poverty' rate.

Keywords: At risk of poverty, Welfare reforms, EU countries, Ireland

**Callan, T., Smeeding, T., Tsakloglou, P. (2007). 'Distributional effects of public education transfers in seven European countries'. ESRI Working Paper 207. Dublin, Ireland: Economic and Social Research Institute. Available at:**  
<http://www.esri.ie/UserFiles/publications/20070904134516/WP207.pdf>

The paper examines the impact of in-kind education transfers on the cross-national scale poverty levels comparison in seven EU countries (Belgium, Germany, Greece, Italy, Ireland, the Netherlands and the UK). The authors point out to the fact that most of the studies on poverty levels focus on income measurements and do not take into consideration non-financial benefits. According to the study the impact of in-kind education transfers is very significant and increases families' real income by a high percentage and narrows differences in inequality. For example in Ireland the income increases up to 33 percent, 30 percent in Belgium and around 15 percent in Italy. The most positive effect is achieved through secondary school transfers. Some of the limitations of the study include the assumptions of equal distribution of education transfers across all children or the valuation of benefits for the families compared with the actual cost for the government to produce them. Also other in-kind incomes should be analysed along with education benefits. The authors conclude with a question asking about the best mixture of in-kind and financial benefits to promote families' well-being.

Keywords: In-kind education transfers, Poverty levels, Belgium, Germany, Greece, Italy, Ireland, The Netherlands, UK



**Callan, T., Coleman, K., Walsh, J.R. (2006). 'Assessing the impact of tax/transfer policy changes on poverty: methodological issues and some European evidence'. *Research in Labour Economics*, 25.**

The authors propose a method of systematically assessing the “first-round” impact of tax and transfer policy changes on the income distribution and the incidence of relative income poverty. The method involves the construction of a “distributionally neutral” policy, which can be approximated by a policy that indexes tax allowances, credits and bands and welfare payment rates in line with a broad measure of income growth. The impact of actual policy changes in five EU countries over the 1998–2001 period is then measured against this benchmark, using the EUROMOD tax-benefit model. The important question was whether wage indexation was an appropriate benchmark. The argument is that it was, because the policy counterfactual created by wage indexation has a unique claim on our attention: it is the only one that comes close to providing a distributionally neutral benchmark. An initial application of the method suggested that over the 1998–2001 period, four of the five countries analysed (Austria, Greece, Portugal and the UK) had tax/transfer policy changes which were particularly favourable to lower income groups. The exception was Ireland, where welfare payment rates over the years 1998 to 2001 failed to keep pace with growth in disposable income. The greatest gains for low-income groups were in Greece and the UK. Correspondingly, these were the countries for which head counts of relative income poverty were most reduced – with a reduction of between 2 and 3 percentage points in the UK. The “open method of coordination” adopted for social policy at Lisbon lays particular stress on comparisons of national policies with “best practice” in the EU in addressing social issues such as unemployment and social exclusion. To date, this has tended to centre on specific schemes or initiatives dealing as examples of “best practice” in dealing with certain client groups. While valuable in itself, this needs to be complemented by “systemwide” comparisons across countries, which take account of the big picture.

Keywords: Tax/transfer policies, Income poverty, Austria, Greece, Ireland, Portugal, UK

**Campolieti, M., Fang, T., Gunderson, M., (2005). 'How minimum wages affect schooling-employment outcomes in Canada, 1993-1999'. *Journal of Labour Research*, 26 (3), 533-545.**

We exploit the substantial variation in minimum wages across different Canadian provinces (as well as within the provinces) between 1993 and 1999 to estimate the effect of minimum wages on the probability of being in one of four different schooling employment states. We also exploit the longitudinal nature of the data to estimate the sixteen transition probabilities across the various schooling-employment states. Our pooled cross-section, time-series estimates suggest that minimum wage increases lead to: (1) large and statistically significant reductions in teenage employment by decreasing the probability of being employed while in school or not in school and (2) no net effect on school enrollment of teenagers because the



increase in the probability of being in school and not employed was largely offset by the decrease in the probability of being in school and employed. Our transition estimates suggests that minimum wage increases do not have statistically significant or substantial effects on the individual transition probabilities; their more substantial net employment effects on the probabilities of being in one of the four schooling-employment states are the result of the aggregation of their effects on a number of individual transition probabilities. As well, the results suggest that there is no substantial evidence of substitution of students for nonstudents or of students leaving school to queue for the higher minimum wage jobs in Canada in the 1990s.

Keywords: Minimum wage, Schooling-employment, Canada

**Chantal, C. (2007). 'Poverty reduction strategies in Quebec and in Newfoundland and Labrador'. Ottawa, Canada: Parliamentary Information and Research Centre.**  
**Available at:** <http://www.parl.gc.ca/information/library/PRBpubs/prb0723-e.pdf>

The paper examines the comprehensive poverty strategies in the Provinces of Quebec and Newfoundland and Labrador in Canada. In the Province of Quebec the government enacted the Act to Combat Poverty and Social Exclusion in 2002. The Act requires government to adopt a plan to fight poverty, which will include amendments to Employment Assistance. The action plan has provision to assist low-income families in finding employment and to improve the standard of living for the recipients of social welfare. The plan also supports the initiative for better social housing, for the assistance to most vulnerable groups, necessary training and learning for unemployed, childcare provision and promotion of social participation. Also a research centre was established to provide accurate information about poverty. In 2004-2005 and oval budget of \$2.5billion was announced to implement the Act to Combat Poverty. The authors point out that it is too early to asses the benefits of the programme, however overall number of people living in poverty has declined including those relying on social benefits. The decline in the numbers of people living on low income is also attributed to the economic growth and therefore especially favourable for the active participants of the labour market. The government of Newfoundland and Labrador has also announced an integrated approach to fight poverty and social exclusion through improved services for the low-income families, establishment of stronger safety net and emphasis on childhood development. The action plan initiatives were announced in 2005 and 2006 Budgets and therefore it is still too early to evaluate the achievements of the programme to combat poverty.

Keywords: Poverty reduction strategies, Quebec, Newfoundland and Labrador, Canada





**Coakley, A. (2005). 'Mothers, welfare and labour market activation'. Research Working Paper Series. Dublin, Ireland: Combat Poverty Agency Poverty Research Initiative. Available at: [http://www.combatpoverty.ie/publications/workingpapers/2005-04\\_WP\\_MothersWelfare&LabourMarketActivation.pdf](http://www.combatpoverty.ie/publications/workingpapers/2005-04_WP_MothersWelfare&LabourMarketActivation.pdf)**

The paper analyses different aspects of childcare for mothers dependent on welfare in Ireland. It points out to the government policy emphasizing welfare-to-work approach without taking into consideration the complexity of choices faced by mothers and their preference to care for children over financial gain. The state expectations concerning working parenthood and parental responsibility of caring for children are often not compatible. The author points out to the challenges faced by mothers and their social status in the society. Often, mothers opt for part-time jobs and stay on welfare benefits so that they are able to care for children and gain additional income. Full time job schedule is rarely an option especially when considering low-wage employment without adequate benefits and childcare options. The report stresses the importance of acknowledging the ethics of care and its place in the society along with policies supporting parental paid leave and wider choice of employment opportunities. It also recommends better state provisions of child care and training for mothers returning to work.

Keywords: Mothers, Care, Employment, Ireland

**Connolly, E. (2007). 'The institutionalisation of anti-poverty and social exclusion policy in Irish social partnership'. Research Working Paper Series. Dublin, Ireland: Combat Poverty Agency Poverty Research Initiative. Available at: [http://www.combatpoverty.ie/publications/workingpapers/200701\\_WP\\_TheInstitutionalisationOfAntiPovertyAndSocialExclusionPolicyInIrishSocialPartnership.pdf](http://www.combatpoverty.ie/publications/workingpapers/200701_WP_TheInstitutionalisationOfAntiPovertyAndSocialExclusionPolicyInIrishSocialPartnership.pdf)**

This paper analyses the way in which anti poverty policy has been institutionalised in the social partnership process and the place of anti poverty policy in the State's policy hierarchy. It is grounded in international academic research that seeks to explain why and how once policy ideas become firmly embedded in political institutions, such as a social partnership process, those ideas are able to structure the policy outputs of those institutions and also why such embedded policy ideas are difficult to change. In Ireland a set of ideas on the management of the economy and the relationship of those ideas to anti-poverty policy were institutionalised in the policy hierarchy from the beginning of social partnership in 1987. The institutional locking of these ideas has meant that policy making has during the lifetime of the partnership process taken place within this framework, explaining why anti-poverty policy has not adapted to the new economic context in Ireland, and why it is unlikely to produce stronger anti-poverty outcomes without a significant change in the macro policy environment.

Keywords: Anti-poverty policies, Social partnership, Ireland



**Corak, M., Fertig, M., Tamm, M. (2005). 'A portrait of child poverty in Germany'. Innocenti Working Paper 2005- 03. Florence, Italy: UNICEF Innocenti Research Centre. Available at:**  
[http://www.unicef.de/download.php?f=content\\_media/presse/fotomaterial/Kinderarmut/Report\\_Card\\_RWI\\_Child\\_Poverty\\_in\\_Germany.pdf](http://www.unicef.de/download.php?f=content_media/presse/fotomaterial/Kinderarmut/Report_Card_RWI_Child_Poverty_in_Germany.pdf)

This article provides an updated and descriptive portrait of income poverty among children in Germany between the early 1980s and 2004, with a focus on developments since unification in 1991. Data from the German Socio-Economic Panel are used to estimate poverty rates, rates of entry to and exit from poverty, and the duration of time spent in and out of poverty. Child poverty rates have drifted upward since 1991, and have been increasing more than the rates for the overall population since the mid-1990s. Numerous policy implications stem from this analysis. More than a million children in Germany depend on social transfer benefit payments. Analysis indicates that East German children, those in single-parent households and children of 'guest workers' face higher poverty rates. Those in households receiving means-tested assistance do relatively well in avoiding the risk of poverty. The authors suggest that escaping poverty is predominantly though not exclusively associated with the formation of dual parent households and job finding. Contributing to a current policy debate in Germany where children are perceived as a poverty risk and demands exist for higher benefits for families with children, this report demonstrates that children in single-parent households are by all measures at considerable risk of living in poverty. However, having children does not per se constitute a poverty risk and therefore a general expansion of childcare benefits independently of household income might not be appropriate to reduce child poverty. The authors suggest that a means-tested system of support to families with children, or more attention to how single-parent households are treated could be a more promising approach. The authors analyse poverty rates pre- and post-government taxes and transfers and find that poverty rates before are much higher than after, especially in East Germany. The authors cite the importance of childcare benefits and tax allowance, and also of maternity and parental leave, free child healthcare, social assistance and lower child rates in public transport. The labour market and family environment are also briefly analysed as important routes out of poverty.

Keywords: Poverty levels, Childcare, Income poverty, Child poverty, Germany, UK, US

**Corak M., Lietz, C., Sutherland, H. (2005). 'The impact of tax and transfer systems on children in the European Union'. Innocenti Working Paper 2005-04. Florence, Italy: UNICEF Innocenti Research Centre. Available at:**  
[http://www.unicef-irc.org/publications/pdf/iwp\\_2005\\_04\\_final.pdf](http://www.unicef-irc.org/publications/pdf/iwp_2005_04_final.pdf)

The objective of this paper is to analyse the impact of fiscal policy on the economic resources available to children, and on the child poverty rate. A static microsimulation model specifically designed for the purposes of comparative fiscal analysis in the European Union,



EUROMOD, is used to study the age incidence of government taxes and transfers in 2001 in 15 EU countries. We find that in most countries children receive a higher proportion of their share of household income from government transfers than young and middle-aged adults, but this is not universally the case. Further, in many high child poverty countries the low income population in their 50s receive a higher proportion of household disposable income from state transfers than those younger than 18. There is considerable cross-country variation in the fraction of the additional household needs arising from having children, which is supported through government transfers. It is higher than 30 percent in 10 out of the 15 countries we study, but in the neighbourhood of 20 percent in others, and in some cases close to only 10 percent. We also find that tax concessions are an important component in many countries and cannot be ignored in measuring public resources for children. We find that poverty rates would be much higher in all countries if there were no child contingent transfers being made. But countries with the lowest poverty rates are those in which children benefit a good deal from other transfers not necessarily directed to them. In some cases this is because of public support to working mothers and fathers, in others because of intra-household transfers from co-resident adults. In another set of countries with low poverty rates child contingent payments make a large contribution to child poverty reduction.

Keywords: Fiscal policy, Child poverty, European Union

**Corrigan, C. (2004). 'Exploring an income adequacy standard for children'. Research Working Paper Series. Dublin, Ireland: Combat Poverty Agency Poverty Research Initiative. Available at: [http://www.combatpoverty.ie/publications/workingpapers/2004-02\\_WP\\_ExploringAnIncomeAdequacyStandardForChildren.pdf](http://www.combatpoverty.ie/publications/workingpapers/2004-02_WP_ExploringAnIncomeAdequacyStandardForChildren.pdf)**

The paper examines the income adequacy standard for children. It is estimated through child poverty rates and cost of raising a child in Ireland. The income adequacy standard is assessed through Ireland's child income policies. The difficulties in the establishment of income adequacy standard for children include different views on the objectives of both individual payments and child income. Also, as it is not usually possible to separate children from the family circumstances in which they live, child income has to be assessed at least in part within overall household income. An adequacy standard could be constructed as a set of criteria against which the impact of a particular level of income support across a range of objectives can be assessed. Criteria might in the first instance be related to measures of child poverty. The author suggests that there should also be criteria that would allow for the different needs of various groups of children, most specifically those in low-income households to be taken into consideration. Some of the research gaps need to be bridged through research into children's view and experience on poverty. Another big gap is the actual cost of raising a child in Ireland. Additionally, research on the changes in those at risk of poverty and poverty dynamics is of particular importance. One of the most notable gaps in our knowledge relates to how child income packages are formulated in different countries. There should be more comparative research studies on the international level including more



than two countries. Author recommends policy makers to take more into their consideration the relationships between income, in-kind benefits, services and work and the way they affect poverty in general.

Keywords: Children, Poverty, Ireland

**Danish Ministry of Social Affairs (2000). 'Early childhood education and care policy in Denmark – Background Report'. OECD Thematic Review Series. Copenhagen, Denmark: Organization for Economic Cooperation and Development (OECD). Available at: [www.oecd.org/dataoecd/48/37/2475168.pdf](http://www.oecd.org/dataoecd/48/37/2475168.pdf)**

This report comprehensively documents the legislative, institutional and theoretical framework for Early Childhood Education and Care (ECEC) Policy in Denmark. This overarching policy is under the primary responsibility of the Ministry of Social Affairs and is intended to further the development, well-being and independence of under school-age children. Three core policy areas are explored in detail: day-care facilities, the optional pre-school class, and school-based leisure activities (SFO). Each is contextualised historically and analysed against extensive statistics. The future direction of each initiative is indicated. Flexibility, innovation and freedom of choice underpin policy approaches to ECEC. The 1999 Social Services Act stipulates that day-care facilities should provide educational, social and care-related support in equal measure to individual children, and be developed in close consultation with parents. Despite very high coverage levels (95 percent for children aged 3-5), demand is increasing due to more flexible working hours and leave schemes in the labour market. Similar trends are noted in the provision of the pre-school year and SFO. Policy development is focused on improving quality and access. The authors document pilot projects that address the involvement of 'children as citizens', noise reduction, efforts to increase male employees in day-care facilities, collaboration between day-care facilities and schools, and healthcare. Efforts to improve access are particularly targeted at the 'new Danes' and bilingual children. The policy approach is based upon a high degree of decentralisation. Local authorities operate ECEC policy with the support of structures such as parent boards and educational councils. The training of staff for these organisations is examined, where the high average age and relatively high proportion of male trainee carers differentiates Denmark from other countries. Some areas of current debate are flagged, including the integration of private day-care, the cost of supplementary services for day-care, and a free choice scheme for private childcare.

Keywords: Early childhood care, Social policy, Denmark



**Danish Ministry of Social Affairs and Ministry of Interior Affairs and Health (2006).  
'National Report on Strategies for Social Protection and Social Inclusion:  
Denmark'. Copenhagen, Denmark. Available at:  
<http://eng.social.dk/index.aspx?id=d842ce15-da10-435d-990d-7351ceea8d32>**

This report describes how social and health policies in Denmark contribute to the three EU wide goals of social cohesion, gender equality and equal opportunities for all. It is a detailed documentation of background, content and future direction of strategies addressing social disadvantage. Policies are based upon the belief that socially disadvantaged people can help themselves when provided with the resources and competencies to do so. Three policy areas are covered: social, pension, and health. Strategies in the social policy area are considered particularly central to breaking the vicious cycle of deprivation and five are explored in depth: education, employment, housing, immigrant integration and combating human trafficking. These strategies are situated within the broader socio-economic context where notable reforms include the promotion of short-term employment, a significant reduction in the number of local authorities, and the set up of a nationwide knowledge and specialist counselling service (VISO). Programmes targeted at addressing deprivation are based upon analysis indicating the high mobility of low income families with children. Our collective responsibility (2002) was a targeted action programme and included a treatment guarantee to drug and alcohol mis-users and special housing for alienated people. A new chance for everyone included initiatives to improve access to the labour market. These former programmes are to be expanded under Our collective responsibility II, using twelve approaches focused on bolstering outreach, contact-creating and supportive activities, and creating a means of accessing the labour market. Equal opportunities for all children and young people is another recent strategy directed at improving day-care facilities, education, the integration of immigrant youth and parent responsibility. The importance of high quality day-care is emphasised as it promotes day-to-day security and gender equality in the labour market. Wide ranging initiatives are proposed: day-care tuition plans and environmental impact assessments, the renewal of vocational training programmes, more training places, further links between social services and schools, and action plans for those witnessing domestic violence and involved in crime. Employment, housing, integration and urban development are similarly documented: job referral and increased training provision are intended for the long-term unemployed, debt remission is proposed for the most disadvantaged and a strategy to curb 'ghettoisation' is in place with the expanded 1999 pilot Freak Houses. Health care aimed at reducing the inequality of health, increasing the number of years with good life quality, and increasing mean life expectancy is reported upon together with social care for the first time. Current strategy is building upon the 2002 programme Healthy for life and focused upon the increased provision of resources and improved usage of these additional resources.

Keywords: Social protection, Social inclusion, Denmark



**European Commission (2006). 'Gender inequalities in the risks of poverty and social exclusion for disadvantaged groups in thirty European countries'. EU: Directorate-General for Employment, Social Affairs and Equal Opportunities. Available at: [http://www.libertysecurity.org/IMG/pdf\\_Gender\\_inequalities.pdf](http://www.libertysecurity.org/IMG/pdf_Gender_inequalities.pdf)**

The report shows through case studies that gender differences and inequalities are features of social exclusion and poverty. The women are at higher at risk to fall into poverty. The report points out to gender differences in common indicators of poverty and social exclusion. Many disadvantaged groups include women as lone parents, older persons in low-income households. Also women suffer the most from domestic and sexual violence and are victims of trafficking. The authors underline the necessity to analyse the vulnerable groups in which membership is more equal between men and women, such groups would be migrants, Roma or disabled people. It is also proved that most social problems are related to men's behaviour, they are the ones responsible for violence, trafficking and sexual abuse. Often women are experiencing 'double' disadvantage because of their ethnic origins and gender discrimination. A more in depth analysis is often necessary to reveal layered identities and multiplicity of experiences structuring the position of men and women. The report focused on multiple disadvantaged groups to show how gender mainstreaming is a necessary tool to analyse different aspects of poverty. Different chapters analysed the situation of lone parents, older and younger people, unemployment, migrant groups, the Roma and violence against women. The general conclusion includes three points. First point is the unsatisfactory information about gender disparities, second is the lack of approach to follow the life course of poverty among different vulnerable groups. The last point emphasises the need for international focus and the inclusion of factors such as migration and trafficking to examine women's experience of poverty.

Keywords: Gender mainstreaming, Social inclusion, European countries

**Friel, S., Walsh, O., McCarthy, D. (2004). 'Financial Cost of Healthy Eating in Ireland'. Research Working Paper Series. Dublin, Ireland: Combat Poverty Agency Poverty Research Initiative. Available at:**

[http://www.combatpoverty.ie/publications/workingpapers/2004-01\\_WP\\_TheFinancialCostOfHealthyEatingInIreland.pdf](http://www.combatpoverty.ie/publications/workingpapers/2004-01_WP_TheFinancialCostOfHealthyEatingInIreland.pdf)

The report examines the cost of healthy eating in Ireland (according to dietary recommendation of Irish food pyramid). The authors designed a study in which low-income families would eat healthy food for one week and counted the cost of food. According to this simulation study if families would like to have the healthy diet the lone parents would need to spend 80 percent of their household budget, two adults with two children would spend 69 percent and single older people 38 percent. Moreover the report analyses the difficulties in purchasing healthier food options for low income families. Their dietary choices are affected by financial resources, accessibility and availability of healthier food and the lack shops providing good quality affordable items.





Often transport is also an obstacle and no delivery options. Furthermore because food is given flexible priority in the household expenditure, the government should provide more realistic financial provision and agree on Minimum Income Standard that would aim at reduction cost of healthy eating.

Keywords: Food poverty, Retail cost, Healthy eating, Ireland

**Goldenberg, M. (2008). 'Review of Rural and Regional Development Policies and Programs'. Ottawa, Canada: Canadian Poverty Research Network. Available at: [http://www.cprn.org/documents/49496\\_FR.pdf](http://www.cprn.org/documents/49496_FR.pdf)**

The report analyses various policies in OECD countries which promote rural and regional development. It points out that traditional instruments and approaches such as industry subsidies, support for economic development, employment creations and business development are not enough to tackle the challenges in the rural areas. Those approaches need to be combined with more comprehensive and situation-oriented resolutions that involve local communities. To illustrate this approach, the examples of Scotland's Investing in Communities Fund and Alaska's Community Development Block Grants programme are given. Regional and rural policy should be based on strategic investments to stimulate development and create local strengths and opportunities. There is a need for financial assistance of development projects, seed monies, supports for community initiative and empowerment. Financial instruments need a better design and public financing must be wisely invested into promising enterprises. Partnership is also a key issue; here the report provides the examples of successful partnership approaches in United Kingdom's Local Strategic Partnerships initiative and in British Columbia's Resilient Communities project. Also the author points to the need of flexibility of policies depending on the region and the involvement of local leadership in the design and delivery of policies. There is additionally a need for new governance structures with involvement of local communities, private and non-profit sector and local institutions. Additionally feedback, monitoring and evaluation are crucial for further development. The good examples of new governance models are the European Union's LEADER+ approach and Scotland's One-Stop Service Shops. Finally, the engagement of individuals and groups is essential for the capacity building and promotion of rural and regional development.

Keywords: Rural and regional development, Holistic approach, OECD countries, Canada



**Government of Canada (2004). 'Exploring the promise of asset-based social policies: reviewing evidence from research and practice'. Synthesis Report; Conference on Asset-Based Approaches. Ottawa, Canada: Policy Research Initiative. Available at: [http://www.policyresearch.gc.ca/doclib/Conference\\_percent20Summary\\_percent20Eng\\_percent20final.pdf](http://www.policyresearch.gc.ca/doclib/Conference_percent20Summary_percent20Eng_percent20final.pdf)**

The synthesis report summarizes the main points raised during a 2003 conference, which is a part of PRI project on New Approaches to Poverty and Exclusion. It brought together experts from Canada, USA and UK to assess the merits and applicability of asset based approach to social policy in Canada. The asset-based approach presents new policy norms and goals for the equality of opportunities and adequacy of resources over a longer period of time. The high levels of asset inequalities are caused by the rules of income support policies requiring low-income recipients to liquidate assets if they want to obtain assistance. For the asset-policies to be changed there is a necessity for longitudinal studies identifying the difficulties in acquiring assets by low-income families. Some opinions pointed out to the fact that savings and assets accumulation are shaped by institutions and whether they facilitated and rewarded savings. The presentation of Individual Development Account policies in Canada, USA and UK gave an example of existing policies encouraging savings. The representative from UK presented the model of Child Fund Trust and the USA gave example of asset-building policies to broaden access to asset development. The conference participants raised issues about the confusion in definition between asset accumulation versus asset holdings and savings. Furthermore they discussed risks and weaknesses of asset based policies and the appropriateness of spending public resources. The point on importance of removing penalties on asset accumulation and the question of the spending appropriateness of assets were also raised.

Keywords: Asset-building policies, Low-income families, USA, Canada, UK

**Hansen, H.T., Jürgens, O., Strand, A.H.H., Voges, W. (2006). 'Poverty among households with children: a comparative study of Norway and Germany'. *International journal of social welfare*, 15, 269-279.**

The authors situate this comparative study of poverty levels in Norway and Germany within the broader context of poverty in Western societies. They focus on the risk of poverty among lone parents and couples households with children, applying three different measurement strategies: income poverty, material deprivation and reception of social assistance. The two case studies are chosen as representatives of different welfare state regimes, social democratic and conservative, focusing on two household groups with similar welfare needs. Analysis is based on data collected in 1995. Broad policies related to labour market and income are compared, where Norway offers more rights to parents including subsidised care services, financial support for childcare and educational benefits for lone parents. Both countries operate means-tested social assistance as a temporary solution though the



emphasis on parental responsibility is higher in Norway. Based upon these differences, the authors expected that large differences in poverty risks would exist in Germany, and lower poverty rates and differences between one- and two-parent families in Norway. The German welfare state, with a high wage replacement, a social insurance-based transfer system and policies that seem to treat lone parent households as atypical, is found to be less suited to protecting single parents from experiencing poverty. However neither welfare state is able to completely protect families. Results show that the different dimensions of poverty are not independent of one another, nor do they wholly overlap. Household characteristic variables, factors influencing labour market status and educational levels also influence the risk of experiencing poverty.

Keywords: Poverty levels, Lone parents, Family policy, Comparative study, Germany

**Hayes, A., Gray, M. (2008). 'Social inclusion: A policy platform for those who live particularly challenged lives'. *Family Matters*, 78, 4-7.**

The article examines the issues around poverty and focuses on the social exclusion. The authors provide an overview of literature about the issues of social exclusion and the way in which various processes lead to the experience of social exclusion. Through the analyses of different studies it is shown that exclusion is associated with geographical location, it happens in 'clusters' of disadvantage. The studies in various OECD countries show that neighbourhood has an important impact on the behaviour and development. However, it is stressed that social exclusion is affected more by family income, educational level, ethnic background and family structure than neighbourhood. The patterns of exclusion are often cross generational and children living in poverty are much more likely to become disadvantaged adults and parents. Overall, the concept of social exclusion provides a depth to the notion of poverty and gives explanation to more complex social dynamics.

Keywords: Social exclusion, Poverty, OECD countries

**Heitzmann, K. (2007). 'Austria: tackling child poverty and promoting the social inclusion of children: a study of national policies'. Peer Review and Assessment in Social Inclusion on behalf of the European Commission, DG Employment, Social Affairs and Equal Opportunities. Available at:**  
[http://ec.europa.eu/employment\\_social/spsi/docs/social\\_inclusion/experts\\_reports/austria\\_1\\_2007\\_en.pdf](http://ec.europa.eu/employment_social/spsi/docs/social_inclusion/experts_reports/austria_1_2007_en.pdf)

The paper examines the extent of child poverty in Austria, the policy measures to decrease poverty and the monitoring available to measure the extent of poverty. According to the data fifteen percent of children under fifteen are at risk of poverty. With the highest risks are the lone parent families, migrant families and families with more than 3 children. The social policies to prevent experience of poverty and social inclusion include health insurance



coverage for 98 percent of population, children of deceased parent's are allowed survivor's pension. There is a special income allowance for mothers; there is also childcare allowance as well as means-tested supplements, parental leave arrangements and family allowance. There is also a set of educational scholarships for children from low-income families. The report suggests that social policy measures to combat poverty are in favour of preventive measures such as insurance and universal transfers. However, the author points out the shortfalls such as eligibility based on family income without provision for individual income measures. Also the income supplements for the poor families must be higher and recalculated for every year. Additionally childcare facilities should reconcile work and family tasks and have more flexible hours to allow mothers to be fully employed. The author also notes that the issue of child poverty is not dealt with while gathering and analysing the information on poverty and should be remedied with more in-depth and targeted information gathering.

Keywords: Child poverty, Social policies, Austria

**Hennessy, E., Donnelly, M. (2005). 'After-school care in disadvantaged areas: the perspectives of children, parents and experts'. Research Working Paper Series. Dublin, Ireland: Combat Poverty Agency Poverty Research Initiative. Available at: [http://www.combatpoverty.ie/publications/workingpapers/2005-01\\_WP\\_AfterSchoolCare.pdf](http://www.combatpoverty.ie/publications/workingpapers/2005-01_WP_AfterSchoolCare.pdf)**

The study examines the benefits of after-school services offered to children and families in disadvantaged communities in Ireland. The analysis includes interviews with 32 children attending after-school clubs and their parents. The School Age Care Environment Rating Scale (SACERS) was used to provide a standardised assessment of the service offered by the club. The study used qualitative and quantitative data and allowed comparison of four after-school services offered to children. According to the authors the findings of the study show that both parents and children are satisfied with the after-school services. For parents the main advantages were social and educational and for children the activities they enjoyed the most were sports and spending time with friends. The clubs received the highest average scores for the quality of the inter-personal interactions and programme structure. After-school services can serve as an important link between families, schools and a variety of community services. They can offer children a safe environment in which to learn new skills, to spend time with friends and to have a good time. They can play a valuable supporting role for families. It is argued that that there is no coherent national policy to develop the after-school services. It is recommended that support be offered to after-school services in disadvantaged communities. This support could take many forms but the findings of the present study suggest that the clubs would benefit particularly from the provision of ongoing training for staff and of support to upgrade their premises and acquire the equipment necessary to offer children a wide range of age-appropriate activities. The present study did not address the important question of how after-school environments in Ireland can best meet children's



needs. The second recommendation of the study is that further research be carried out on how children's experiences are influenced by aspects of the after-school environment. Important aspects of the environment that need research include staff training, staff-child ratio and the number and ages of children in a group. The findings of this research could provide important information for the development of future policy initiatives and legislation to regulate the sector.

Keywords: After-school care, Disadvantaged families, Ireland

**Hunter, G., Miazdyck, D. (2004). 'Current issues surrounding poverty and welfare programming in Canada – two reviews. 1. Race to the Bottom: Welfare to Work Programming in Saskatchewan and its Similarities to Programming in the United States and Britain and 2. Low Income Cut-Offs (LICO) and Poverty Measurement'. Ottawa, Canada: Canadian Centre for Policy Alternatives. Available at: [http://www.policyalternatives.ca/documents/Saskatchewan\\_Pubs/poverty\\_welfare.pdf](http://www.policyalternatives.ca/documents/Saskatchewan_Pubs/poverty_welfare.pdf)**

(1) Race to the Bottom: Welfare to Work Programming in Saskatchewan and its Similarities to Programming in the United States and Britain

The research literature suggests that in refashioning welfare program delivery, states have moved from a needs-based eligibility, social entitlement and labour market exclusion programs to models that emphasize selective entitlements, active programming and maximum participation in wage labour. Active welfare programming suggests that national programs for welfare have been replaced by local experimentation in delivery. In the United States this model is viewed as the 'work-first approaches' to welfare programming and in Britain the model is viewed as 'Third Way' policy-making. This article argues that Canada has followed the United States in welfare programming, and has blended the United States model with ideology borrowed from British Prime Minister Tony Blair's Third Way welfare approach to produce its own hybrid welfare programming model. The paper examines the local experimentation of welfare programming in the province of Saskatchewan, and makes comparisons between welfare programming for the vulnerable population of the poor in Saskatchewan to the welfare programming for the poor in the United States and Britain.

Keywords: Welfare to work, Third Way policy-making, Canada, United States, Britain

(2) Low Income Cut-Offs (LICO) and Poverty Measurement

This article explores the methodology behind and some of the criticisms of Canada's Low Income Cut-Off (LICO) measure. The LICO has a fifty-year history of use in Canada, and serves as the country's unofficial de facto poverty line. The measure has come under recent scrutiny because of the debate surrounding child poverty in Canada. In tracking the initial development of the LICO measure, the authors describe the original intent of the measure and its method of calculation. Changes to LICO cut-off levels over time reflect the changing



upward movement in Canadian income patterns. Through use of simple calculations, the implications of using the before-tax income variable and Statistics Canada's recent change to publishing findings using the after-tax income variable are evaluated. The authors highlight the changes to the LICO measure over the past fifty years, and evaluate it as a measure of income inequality.

Keywords: Low Income Cut-Off measure, Poverty line, Canada

**Immervoll, H., Sutherland, H., de Vos, K. (2001). 'Reducing child poverty in European Union: the role of child benefits'. In Vleminckxx, K., Smeeding, T.M., *Child Well-being, child poverty and child policy in modern nations*, 407-433. Bristol, UK: The Policy Press.**

The chapter analysis the role of child benefits in protecting children in EU from poverty. The choice is to explore cash benefits which are not means-tested. The authors draw a single European poverty line to keep in view the absolute standards of income. Fifteen countries are studied to count the proportion of children living with income below EU poverty line. The observations are as follows: the proportion of household under poverty line is the highest in Portugal, Spain and Greece from 26 percent to 50 percent of EU poverty line and the lowest in Luxembourg, Denmark, Sweden, Netherlands and Luxembourg below 10 percent. To investigate the importance of child benefits for the poorest households in EU, the authors carried out a stimulation. The benefits were set to 0 and number of children in households below poverty line was recounted. The poverty line staying fixed. In this case, European rate of child poverty increased by 7 percent. The removal of benefits hits the most: UK, Belgium, Austria, France and The Netherlands were the benefits are relatively large and successful. Furthermore, static microsimulation model was used to see what kinds of child benefits would reduce child poverty and which policy instruments could be used to do so. To illustrate the potential effect of child benefits on child poverty the example of the Netherlands and UK was provided. For both countries the benefits play a significant role and protect children from poverty. The effects of 'swapping' child benefits system were examined. The Netherlands system was in transition from 'old' system depending on number and age of children, which was more generous and more effective in reducing poverty to the 'new' system depending on age only. In the UK the 'old' Netherlands system would be the most effective. The focus was on benefits that are not means-tested. It was shown that poverty reduction properties of those benefits may be improved. With and EU15 version of EUROMOD it is possible to compare countries with more diverse systems. Further work would be necessary to find out about the beneficial effects on child poverty in the UK by using child benefits that depend on age and number of children.

Keywords: Child benefits, Poverty, Norway, UK





**Jamet, S. (2007). 'Combating poverty and social exclusion in France', OECD Economics Department Working Paper 569. Paris, France: OECD Publishing. Available at: <http://oberon.sourceoecd.org/vl=4257720/cl=33/nw=1/rpsv/cgi-bin/wppdf?file=5l4jmm083mjk.pdf>**

The author overviews the current situation with regard to poverty in France, as well as the current policy approach to dealing with it. The current policy approach involves a large number of measures tailored to different circumstances. Some policies have unwanted side effects on labour market performance, and their cost-effectiveness could be improved to obtain better outcomes with the same resources. Concentrations of poverty and social exclusion in certain geographic areas and among certain groups of the population provide one of the most difficult challenges, for which contributions from education, labour market, housing, urban planning and anti-discrimination policies, as well as from the social services, are necessary. Overall the author recommend the increase job security for all throughout working life to harmonise the rights and obligations of the jobless and to increase the effectiveness of return-to-work schemes.

Keywords: Poverty, Policy approach, France

**Kalb, G., Lee, W. (2007). 'The effect of an alternative childcare subsidy on labour supply: a policy simulation'. MI Working Paper Series. Melbourne, Australia: Melbourne Institute. Available at: <http://melbourneinstitute.com/wp/wp2007n14.pdf>**

The paper examines through a microsimulation model how an extended childcare subsidy proposed by the Taskforce on Care Costs in October 2006 affects labour behaviour for single parents and families. The paper showed that replacing the 30 percent Child Tax Rebate (CCTR) with a 50 percent up to maximum \$20.000 of childcare costs per family per year will have a significant impact on labour supply. The reforms would return over 50 percent of the money invested by the government through increased income tax and reduced income subsidies. The increase would be particularly high for the lone parents (almost 100 percent). The authors mention the shortcoming of the paper in not addressing the issue of administering costs. Overall conclusion is that childcare subsidy reforms could have an important effect on the labour force participation.

Keywords: Childcare subsidy, Labour supply, Australia



**Kalb, G., Thoresen, T. (2007). 'The case for labour supply incentives: a comparison of family policies in Australia and Norway'. MI Working Paper Series. Melbourne, Australia: Melbourne Institute. Available at: <http://melbourneinstitute.com/wp/wp2007n27.pdf>**

The study examines the family support schemes in Australia and Norway. By using microsimulation models, the authors analyse the possibilities of transferring various policies to encourage changes in parents' participation in employment. In Norway parents are subsidised through non-parental care and universal family income support while in Australia the subsidies are means-tested or income-tested. The paper responds to the question of whether the two systems could be designed in a different way to provide improved employment incentives. In Norway the reduced child care fees encourage mother's labour supply; however it does not affect the income distribution. It is brought to attention that there is already a very high degree of income transfer to mothers in Norway and therefore this may not be the best option. In Australia the effects are similar and labour supply incentives are very costly and the gains are not substantial, the abolition of means-testing would be also very costly and would reduce support to low-income families. The lower childcare fees in Australia would have a similar effect as in Norway without important additional income being gained. The authors conclude that Nordic model would not bring expected gains. It is suggested that more targeted payments for low-income families in Australia would be more beneficial to encourage mothers' labour participation. Also, there is a chance that in-work benefits such as already existing in the US and UK would be more beneficial for the Australian system and would allow more equitable income distribution.

Keywords: Labour supply policies, Mothers' participation, Income distribution, Norway, Australia

**Kammerman, S.B., Kahn, A.J (2001). 'Child and family policies in an era of social policy retrenchment and restructuring'. In Vleminckx, K., Smeeding, T.M., *Child Well-being, child poverty and child policy in modern nations*, 501-527. Bristol, UK: The Policy Press.**

The study focuses on an overview of government investment in children and families. The question about public investment in children and families was analysed through case studies. For the Scandinavian countries the example of Denmark and Sweden was outlined. In Denmark the child and family benefits were sustained during the 90's decade, support for universalism has continued and even increased. The Danish poverty rate was only about 4 percent. Danish expenditure continued to increase as percentage of GDP. The authors stress the importance of training, education and 'active' labour market policy. In Sweden the government was slightly less generous, but child related benefits were protected. The Scandinavian model remained extremely generous to children and families. In the continental Europe France was also faced with lower economic growth in the 90's. Even though some



cuts were imposed on family benefits in 1996, still France remained committed to family and child benefits. In Germany although the child benefits were preserved, those living in East Germany experienced some cuts. In Austria family allowances remained among the most generous in the EU/OECD countries. In the Anglo-American countries the case of US and UK were analysed. In the UK with the high child poverty rate under the New Labour the child benefit levels were raised and government created unit to coordinate policies on social exclusion. Lone parent families presented a major problem. In the US the public investment in the child care increased in the first half of decade. However, no action had been implemented and no clear movement to protect public investment in children. Overall data suggests that some countries have raised benefits in first half on 90's especially for low-income families. Many countries increased their attention to lone-parent families in particular often deciding to limit receipt of benefits and encourage participation by mothers in the labour force. Parental leaves were extended and childcare services continued to increase. The major function of family benefits continued to supplement wages to ensure adequate standard of living for families. Child benefits were increased slightly as a portion of social expenditure for the whole EU between 90 and 96. The favouring of child benefits in many of OECD countries came from a strong moral argument to support child policies. Child and family cash and in-kind benefits were in focus based on assumption that public investment in children gave better outcomes.

Keywords: Government investments, Children and families, EU/OECD countries

**Kamerman, S.B., Neuman, M., Waldfogel, J., Brooks-Gunn, J. (2003). 'Social policies, family types and child outcomes in selected OECD countries'. OECD Social, Employment and Migration Working Paper 6. Paris, France: OECD Publications. Available at: [http://www.childpolicyintl.org/publications/SOCIAL\\_percent20POLICIES\\_percent20FAMILY\\_percent20TYPES\\_percent20AND\\_percent20CHILD\\_percent20OUTCOMES\\_percent20IN\\_percent20SELECTED\\_percent20OECD\\_percent20COUNTRIES.pdf](http://www.childpolicyintl.org/publications/SOCIAL_percent20POLICIES_percent20FAMILY_percent20TYPES_percent20AND_percent20CHILD_percent20OUTCOMES_percent20IN_percent20SELECTED_percent20OECD_percent20COUNTRIES.pdf)**

The research examines the literature on child poverty and state policies to eradicate the child poverty in OECD countries. The authors stress the fact of lacking information on child poverty and policies on the cross-national level and within the countries; the existing research is very fragmentary and specialised. In general the English-speaking countries undertook the major research on child poverty and policies outcome. Overall, from the existing research literature, the authors conclude that the main reasons for child poverty are living in low-income families, in lone parent households or having teenage parents. A second important finding is that there is no one policy responsible to decrease child poverty. Only a combination of different policies can achieve the decrease in child poverty. The authors recognize the importance of policies guided towards maternal employment and leave, as well as income transfers and higher wages. Also the value of pre-school is pointed out and it's positive impact on child's development. The researchers recognize big gaps in the research



such as in maternal employment – lack of analysis of differences between full-time, part-time and flexible work schedules. There is also a need to focus on maternal employment for children younger than three years old. The further research on the situation of children in ethnic groups, child neglect and abuse, prevention of teenage pregnancy and the impact of minimum child benefits on child well-being is also necessary. According to the authors the existing research focuses heavily on the negative outcome and not on the positive indicators of child well-being. The need to focus more on policies to decrease child poverty is also underlined.

Keywords: Child poverty, Policies to eradicate poverty, OECD countries

**Kingwell, P., Dowie, M., Holler, B., Vincent, C., Gyarmati, D., Cao, H. (2005). ‘Design and implementation of a program to help the poor save: The Learn\$ave Project’. Ottawa, Canada: Social Research and Demonstration Corporation. Available at: [http://www.srdc.org/uploads/learnsave\\_implementation.pdf](http://www.srdc.org/uploads/learnsave_implementation.pdf)**

The report analyses the implementation of learn\$ave project in Vancouver, Toronto and Halifax in Canada and was inspired by the Individual Accounts (IDAs) introduced in the 1990s in the United States. The project was designed to test the potential for improvement of the financial situation of low income families and build their savings for the future purchases, investments and education. The project dates back to June 2000 and should end in 2009. As of mid-2005 all of the most important operational phases were completed. Overall the project met the recruitment target with 4,827 participants (which was set to 4,875). Most likely to apply were recent immigrants, or individuals who were younger, single, employed or with formal education. The report mentions few difficulties which aroused during the various stages of implementation. One of the difficulties concerned the recruitment of the participants, and the recruitment period had to be extended because of the low participation. The participants of the learn\$ave project did not represent the whole eligible group and an array of different methods need to be designed to reach this group. Some of the participants were not satisfied with the training that comprised financial management and self-assessment of the prior learning. However, overall most of the participants were satisfied with the programme and felt that it was well implemented.

Keywords: Learn\$ave project, Saving, Low-income, Canada



**Knight, B., Waslander, B., Wortsman, A. (2008). 'Review of registered education savings plan'. Ottawa, Canada: Informetrica Limited. Available at:**  
[http://www.hrsdc.gc.ca/en/publications\\_resources/evaluation/2008/industry\\_practices/industry\\_practices.pdf](http://www.hrsdc.gc.ca/en/publications_resources/evaluation/2008/industry_practices/industry_practices.pdf)

The report analyses the industry practice concerning Registered Education Savings Plans (RESPs) taking into consideration government policies and experience of subscribers. The purpose of this report is to find out whether there are policies or practices which prevent the ability to access those educational funds. The review shows that for the most part the RESPs are implemented in accordance with objectives and are encouraging Canadians to save for the education of their children. However, there are still a few problems encountered by the subscribers. Financial institutions such as banks, credit unions, investment and securities dealers are not promoting RESPs. Additionally, the subscribers do not get simple information about the potential negative results of their investment and other options of investments such as RRSPs or tax-free saving accounts. Another problem lies in the fact that directors of foundations who are working for RESPs distributors or own their shares are in the conflict of interest because they sit on the boards of the groups scholarship funds. The reports also shows that group scholarship plans produce some unwanted outcomes in the case when plans are closed prematurely or when beneficiaries do not qualify for Educational Assistance Payments (EAPs) and furthermore they are discouraged from post-secondary education.

Keywords: Registered Education Savings Plan, Post-secondary education, Canada

**Kornberger, R. (2001). 'Welfare or work: which is better for Canadian children?' *Canadian Public Policy - Analyse de Politiques*, 27 (4). Available at:**  
<http://economics.ca/cgi/jab?journal=cpp&view=v27n4/CPpv27n4p407.pdf>

The study analyses the impact of employment status of parents in low-income families on child development by comparing the verbal development of preschool children in working poor and welfare dependent families. The report stresses the fact that for both groups the verbal development score was below the norm. However, the children in welfare dependent families are slightly behind to children in working poor families. It is pointed out the difference being small it may be due to some variables that have not been examined in the study. The study also suggests that parents' education has a positive impact on the child's verbal development. The authors point out that measures of welfare-to-work are not sufficient to improve the children's situation, there is a need for additional education and training. It is recognised that some potentially important data is missing from the study; it includes child-care arrangements, role of parental health on child's development and family dynamics. Also there is a need for more in depth study on the kinds of welfare-to-work programmes and along with implications for child development.

Keywords: Child development, Working poor, Welfare dependent, Canada



**Kuhnle, S., Hort, S. E. O. (2004). 'The developmental Welfare State in Scandinavia: Lessons for the Developing World'. Social Policy and Development Programme Paper Number 17. Geneva, Switzerland: UNRISD. Available at:**  
[http://www.cep.ci/UNRISD/References/Ref\\_UNRISD/kuhnle\\_hort.pdf](http://www.cep.ci/UNRISD/References/Ref_UNRISD/kuhnle_hort.pdf)

Is there a Scandinavian route from the era of semi-feudal societies and absolutist states to contemporary societies with democratic regimes, affluent economies and comprehensive welfare states? The paper traces crucial steps in the history of the Scandinavian welfare state from its early beginnings in the late 19th century until the modern day. Particular attention is drawn to the general adherence to the principle of universalism. It shows that the development was piecemeal towards the post-World War II comprehensive welfare state characterised by the principle of universalism and a strong role of the state and local government. A strong social role of the state has not been incommensurate with economic development: Economic growth and the institutionalisation of comprehensive social security and welfare services programmes could develop hand in hand. The construction of the welfare state was gradual and a continuous balancing act between stimulating economic development and promoting social justice. During periods of economic downturns and setbacks in the most recent decades, modifications of programmes and benefit structures were made, but some programmes were also expanded. The Scandinavian welfare state has remained comprehensive and on the whole rather generous, and although criticism of the scope of the welfare state has been put forward, the welfare state remains popular among the population and most politicians from various political parties will defend it on moral, political and economic grounds. The Scandinavian historical experience cannot be copied, and the characteristics and goals of the Scandinavian welfare state may not be a universal desire, but the Scandinavian route to a modern democratic welfare state may still offer some general lessons as to interrelationships between political, economic and social development.

Keywords: Welfare state, Social development, Scandinavian state

**Kunz, J., Villeneuve, P., Garfinkel, I. (2001). 'Child support among selected OECD countries: a comparative analysis'. In Vleminckx, K., Smeeding, T.M., *Child Well-being, child poverty and child policy in modern nations*, 485-501. Bristol, UK: The Policy Press.**

The chapter analysis the level and trends of child support payments in OECD countries and their evolution between late 70's and mid 90's using data from Luxembourg Income Study (LIS) The trends in child support collections were analysed in seven OECD countries – Australia, Belgium, Denmark, Finland, Netherlands, US, UK. Three out of them: Australia, UK and US undertook major effort to improve child support collections. In each of those three countries during the analysed period the government changed from non-involvement in private child support collection to the establishment of agencies participating in this process. Outcomes from those countries were examined. The limitations in the study comes from the





fact that the data on some variable is lacking as for example the income of non-resident parent, the level of education of the parents, non-resident marital status or widowhood status. The results are mixed for the above countries. In Australia there is a steady increase in child support receipt among the eligible households. The collection efforts in the US and UK do not seem to have paid off – possibly because of the weakness of policy. In the UK the number of households eligible for child support and the level of payments have fallen relative to poverty line. In the US the reform efforts do not seem to have succeeded in raising the percentage receiving child support or the payment levels relative to poverty line. In Belgium and the Netherlands there was increase in the percentage receiving child support, however it was not clear whether this changes was due to policy or demographic shifts or due to small sample size. The results for Denmark and Finland were more stable.

Keywords: Child support payments, Poverty, OECD countries

**Lee, W., Oguzoglu, W. (2007). 'Well-being and ill-being: a bivariate panel data analysis', Melbourne Institute Working Paper Series. Melbourne, Australia: Melbourne Institute. Available at: <http://melbourneinstitute.com/wp/wp2007n28.pdf>**

The aim of this paper is to estimate in a multivariate context the factors associated with well-being and ill-being without making the assumptions that they are opposite ends of the same continuum, and that the factors uniformly affect both well-being and ill-being. Using the first five waves of panel data from the Household, Income and Labour Dynamics in Australia (HILDA) survey, we jointly model positive and negative wellbeing in a two-equation dynamic panel data model. We found that while past ill-being had a significant effect on current well-being there was no support for a reverse relationship (i.e. lagged effect of well-being on current ill-being). In addition, we also found support for asymmetry in how certain factors affect well-being and ill-being. The implication of the findings in this paper for the happiness literature is that for future empirical work, it would perhaps more prudent to begin with the notion that well-being and ill-being are distinct dimensions, that the unobservables that affect well-being and ill-being are correlated, and to specify econometric models that allow for these concepts to be reflected.

Keywords: Well-being, Ill-being, Australia



**Leviten-Reid, E., Makhoul, A. (2005). 'Quality of life CHALLENGE: fostering engagement, collaboration and inclusion'. Ottawa, Canada: The Caledon Institute of Social Policy. Available at:**

<http://www.caledoninst.org/Publications/PDF/555ENG.pdf>

The article examines the Quality of Life CHALLENGE which is a joint initiative in the province of British Columbia of Community Social Planning Council of Greater Victoria and various individuals, organisations and businesses. The CHALLENGE addresses critical community challenges and focuses on housing, sustainable incomes and connections in community. The initiative has seven levers through which to bring the better quality of life. The levers are shared leadership, awareness-raising of quality of life issues, recognition and sharing of successful stories in the community, community ownership, relationship among people of all sectors, inclusion of diverse groups and finally monitoring and measuring of the results. The CHALLENGE has brought various participants to address the housing inadequacies, income and unemployment through initiatives such as business to business support and many others community based actions.

Keywords: Quality of life CHALLENGE, Community participation, British Columbia, Canada

**Makhoul, A. (2005). 'The living wage learning initiative'. Ottawa, Canada: The Caledon Institute of Social Policy. Available at:**

[http://www.caledoninst.org/Publications/PDF/535ENG\\_percent2Epdf](http://www.caledoninst.org/Publications/PDF/535ENG_percent2Epdf)

The article examines different living wage learning initiative in various provinces of Canada. The living wage movement in the USA is also present in Canada and the city-by-city effort to introduce wages above minimum wage. The author gives examples of Vibrant Communities in Niagara Region, Waterloo, BC's Capital Region, Surrey, Edmonton and Calgary. The Vibrant communities established Living Wage Learning Initiative – a series of tele-learning seminars in 2004-05 which analysed the lessons from the movement in the US and potential application in Canada. The article describes the approaches used by Canadian living wage proponents as regulatory and voluntary (as in the US), a third approach used in the US targeted wage subsidy programmes through tax code have not been a part of discussion in Canada. Campaign experience from six communities in Canada and in the US provides an insight into community based approach to sees living wages as a good way to reduce poverty. The author points out those campaigns in the US built coalitions among various partners such as labour unions, faith groups, non-profit organisations and community groups. Furthermore the experience of Vibrant Communities living wage is described in six Canadian communities. The author underlines the importance of sharing information and experience of the communities for the successful continuation of the living wage campaigns.

Keywords: Living wage campaign, Minimum wage, US, Canada



**Manandhar, M., Share, M., Friel, S., Walsh, O., Hardy, F. (2006). 'Food, nutrition and poverty among asylum-seekers in North-West Ireland'. Research Working Paper Series. Dublin, Ireland: Combat Poverty Agency Poverty Research Initiative. Available at: [http://www.cpa.ie/publications/workingpapers/2006-01\\_WP\\_FoodNutritionAndPovertyAmongAsylumSeekersInNWIREland.pdf](http://www.cpa.ie/publications/workingpapers/2006-01_WP_FoodNutritionAndPovertyAmongAsylumSeekersInNWIREland.pdf)**

The study examines different nutritional experiences among refugees and asylum seekers in the counties of North West of Ireland, in counties Sligo, Leitrim and Donegal. The research was conducted to respond to refugees concerns regarding their nutrition situation and poverty. The findings are obtained through qualitative and quantitative research undertaken among refugees and asylum seekers in two types of accommodation – living on their own in communities and in Direct Provision services. Overall, refugees have adequate food intake, however they experience food poverty and express concern with quality of food especially in Direct Provision. In the communities they are often in areas with difficult access to shopping centres and have no transportation or means to purchase their food choices related to cultural background and culinary customs. In Direct Provision, they often feel depressed and the social context of eating is non-existent, on the other hand in the communities they are excluded. To improve the nutritional situation of refugees the authors recommend providing higher financial support for the refugees, pro-poor socially inclusive policies and provision of more affordable ethnic food in the markets. Also the time spend in Direct provision should be shortened and there ought to be more variety of food options taking into consideration ethnic and cultural differences. At the community level authors prescribe more activity toward building supportive environment for refugees, stimulate interest around ethnic differences and acknowledge the importance of food in the refugee's lives.

Keywords: Nutrition, Refugees, Food poverty, North West Ireland

**McDonald, C. (2008). 'Pulling the threads together: consultations, conversations and contemplations on child poverty in Australia'. Australian Research Alliance for Children and Youth. Available at: <http://www.aracy.org.au/AM/Common/pdf/1-06-02-1percent20Paperpercent20-percent20percent20McDonaldpercent20-percent20Pullingpercent20thepercent20threadspercent20together.pdf>**

The paper presents the summary of project undertaken in 2006 to explore Australian's children's understanding of poverty. The author stresses the importance of this kind of study especially because most of the perspectives on child's poverty focus mostly on children as member's of family and do not undertake individual approach to children's needs. Not recognising children's agency in their own lives fails to acknowledge the potential of children and young people to inform policy which will impact on their lives. The authors argue that using economic models to conceptualise the experience of poverty provides little insight into the social, emotional and cultural implications of being poor, and reveals very little about the nature of children's experience of poverty. The review of the literature and consultations with



national experts and children and young people, all indicate the importance and need for a greater understanding of children's experience of poverty. Children play an active and critical role in helping manage theirs' and their families' experience. Issues about poverty raised by children in their discussions which need to be addressed in research include: the adequacy of children's immediate living environments, children's participation in activities, including informal peer group and family activities, organised out-of-school activities, and constraints on participation, the role of social resources, including family, friends and others, in supporting children and young people recognition of children's active engagement in seeking to manage or change their circumstances through education and work. The increased understanding of children's experience will inform both further research and policy. In this way policies developed to address the needs of children in poverty are more likely to meet children's needs.

Keywords: Child poverty, Children's perspective, Australia

**Mendelson, M. (2003). 'Formative evaluation of the Canada education savings grant program: Final Report'. Ottawa, Canada: Caledon Institute of Social Policy.**  
**Available at** <http://www.hrsdc.gc.ca/en/cs/sp/hrsdcc/edd/reports/2003-002509/page00.shtml>

The report evaluates The Formative Evaluation of Canada Education Savings Grant Program (CESG). It assesses CESG's relevance, design and delivery, and early impacts. The evaluation process was undertaken January to October of 2002, three years after the program began operating. According to the authors the literature review indicated that factors impeding Post-Secondary Education (PSE) include the costs of PSE, parents having low levels of education, and a child having poor school performance. The analysis of Canadian parents' survey questions reveals that they are interested in their children education. However, often they are uncertain of the involved costs and necessary savings. The CESG program is designed to encourage parents to save for the future PSE education of their children through a combination of tax-sheltered income-earning savings and grant. The further report analysis indicates that factors affecting the undertaking of CESG by the parents include parent's education, age and school aspirations for their children, the child's performance in school, and province of residence. Registered Education Savings Plan (RESP) contributions rise with income and awareness of the CESG and its rules is low in lower income groups. Government promotion materials are seen as not effective in reaching subscribers and potential subscribers. Factors identified as affecting program delivery included the potential for the grant to be seen as insignificant, insufficient human resources to manage the program, confusion in the public's mind over the respective roles of Human Resources Development Canada (HRDC) and Canada Customs and Revenue Agency (CCRA), and the fees financial institutions charge subscribers. According to the authors the available evidence indicates that the number of individuals contributing to RESPs increased



significantly when the CESG was introduced. There is a need for more targeting at lower-income families and for more effective promotional materials to reach targeted audiences.

Keywords: Education Saving Grant Program, Post-Secondary Education, Canada

**Müller, K-U., Steiner, V. (2008). 'Would a legal minimum wage reduce poverty? A microsimulation study for Germany'. IZA Discussion Paper 3491, Bonn: Institute for the Study of Labour (IZA). Available at:**

[http://www.politiquessociales.net/spjp.php?action=dw2\\_out&id=2028](http://www.politiquessociales.net/spjp.php?action=dw2_out&id=2028)

Germany is one of the few OECD countries where no general legal minimum wage currently exists. In view of rising wage inequality and increasing poverty, its introduction has recently become an important policy issue in Germany. Proponents argue that 'unfair' competition exists as result of wage subsidies aimed at increasing employment in the low-wage sector. A minimum wage could address this and prevent poverty among the working poor. The authors analyse the distributional effects of the introduction of a nationwide legal minimum wage of €7.50 per hour on the basis of a microsimulation model which accounts for the complex interactions between individual wages, the tax-benefit system and net household incomes. Research on the extent to which minimum wages can affect income distribution and reduce poverty is mainly focused on the U.S. Simulation results here show that the minimum wage would be rather ineffective in reducing poverty in Germany, even if it led to a substantial increase in hourly wages at the bottom of the wage distribution and had no negative employment effects. The ineffectiveness of a minimum wage in Germany is mainly due to the existing system of means-tested income support with a high social minimum relative to net in-work income and high benefit withdrawal rates.

Keywords: Minimum wage, Working poor, Poverty reduction, Germany

**Oxley, H., Dang, T-T., Förster, M., Pellizzari, M. (2001). 'Child and family policies: Income inequalities and poverty among children and households with children in selected OECD countries: trends and determinants'. In Vleminckx, K., Smeeding, T.M., *Child well-being, child poverty and child policy in modern nations*, 371-407. Bristol, UK: The Policy Press.**

The chapter reviews changes in average incomes of OECD countries, the distribution of incomes and poverty of children. According to the authors the changes in poverty levels among children are due to the tax/transfer system allocation and the falling of average size of household for the decade (besides Germany, Sweden, UK, US). Overall there is more children in lone-parent household and the highest number is in non-worker households; the increased share of children in lower income households has led to faster fall in the relative incomes of children. When analysing cross-country child poverty statistics there are considerable differences from less than 4 percent in Nordic countries to 20 percent in Anglo-



Saxon and Southern Europe. Further analysis shows that non working households have the highest risk of child poverty. The lowest shares in Nordic and Belgium the highest in Anglo-Saxon and Southern countries. Overall, there is absence of general worsening of the situation for children. When analysing the data from 12 countries the authors found that on average the poverty rate has been reduced by about half. Over time tax and transfers have become more effective with dealing with poverty. While reviewing different child poverty reducing policies the countries which have higher efficiency due to targeting have traded a good part of it by reducing effort. Countries with high targeting may need to spend more on the child poverty to reduce it (US, Australia) and those with high effort and low levels of poverty may need to do more targeting to deal with 'hard-core' poverty. In conclusion authors stress the fact that Nordic countries and Belgium do better than others. No significant deterioration in child well-being was found. The cross country- differences reflect in the poverty risks for each family/working groups. The problem is not only within non-working households, but there is also a 'working poor' phenomenon that need to be dealt with two-adult, one earner families tended to show the most widespread increase in poverty rates across countries. The authors prescribe the measures to fight poverty through increased employment and also the level of effort and targeting must be increased to make a sufficient progress in lowering poverty.

Keywords: Average incomes, Poverty level, Children, OECD countries

**Robson-Haddow, J. (2004). 'The key to tackling child poverty: income support for immediate needs and assets for their future'. Ottawa, Canada: The Caledon Institute of Social Policy. Available at:**

[http://epe.lacbac.gc.ca/100/200/300/caledon\\_institute/caledon\\_commentary/key\\_to\\_tackling/key.pdf](http://epe.lacbac.gc.ca/100/200/300/caledon_institute/caledon_commentary/key_to_tackling/key.pdf)

The article shortly summarizes the difficult situation of poor families in Canada and the necessity to ease their poverty and provide them with more opportunities to save money and assets for themselves and their children. The author mentions various savings plans for the children's education already existing for the wealthier part of the Canadian society in contrast with only a few opportunities for the poorer. It is suggested that only more comprehensive social policies including access to assets and savings could ease the difficult situation of the poor families. Among already existing programmes encouraging savings for the low-income families are federally funded programmes learn \$ave project through creation of Individual Development Accounts (IDAs) and multi-year asset building policy research agenda introduced by Social and Enterprise Development Innovations. The project to start education savings for the low-income families through Canada learning Bond is also mentioned as very important. Authors recommendations for the 'right' policies to improve the situation of poor families and their abilities to save and gain assets are as follows: to introduce more income-base programs rather than universal ones; the adequate support for the parents who will decide to participate in long term saving schemes for the future education of their children;





community agencies to deliver asset-building programmes; coordination on the governmental and provincial level and finally adequate income to allow low-income families to save without compromising most essential present needs.

Keywords: Asset - building policies, Low-income families, Education, Canada

**Tanaka S. (2005). 'Parental leave and child health across OECD countries'. *The Economic Journal*, 115, 7-28. Available at:**

<http://paa2004.princeton.edu/download.asp?submissionId=41254>

The study examines the effects of parental leave on child health in OECD countries. It builds on the Rhum's (2000) research findings. The report finds significant effects of the extension of job-protected paid leave in decreasing mortality rates, especially post-neonatal mortality rates. The authors compare the effect of paid and non-paid leave and in the non-paid leave does not have a significant effect on decreasing infant mortality. It is found that 10-week extension in paid leave would decrease post-neonatal mortality by 4.06 percent. The results of the study show a significant positive relationship between paid leave and birth weight. It is also shown that public expenditures of maternity and parental leave have positive effect on decreasing post-neonatal mortality rates. The author stresses the importance of examining other factors such as breast-feeding, prenatal leave and length of leave to establish the causality in further detail.

Keywords: Parental leave, Child health, OECD countries

**Teelucksingh, C., Galabuzi, G-E. (2005). 'Working precariously: the impact of race and immigrants status on employment opportunities and outcomes in Canada'.**

**Toronto, Canada: Canadian Foundation for Race Relations. Available at:**

<http://www.crr.ca/diversfiles/en/publications/reports/publWorkingPrecariously.pdf>

The research draws attention to racial discrimination in employment in Canada, and discusses the impact on the status of racialised groups in the Canadian labour market. Racial discrimination occurs in Canada in at least two forms, economic discrimination, (when employers make generalised assumptions about the worth of racialised employees), and exclusionary discrimination (when members of a racialised group are not hired, paid equally or promoted regardless of their skills and experience). Recognizing the growth of the racialised population of Canada, the report argues that this growth in the racialised population makes the issue of racial discrimination one of great importance. The research seeks to answer the question whether the position of individuals within the Canadian labour market are determined partly by their racial group affiliation and if racialised men and women in Canada, and immigrants are denied full access to the Canadian labour market because of it. The report uses data largely from the 1996 and 2001. It compares the workforce participation of racialised groups in different occupational groups. The report also includes



findings from interviews with settlement sector officials working with internationally educated professionals in five major Canadian urban centres. Based on an analysis of these data, the report finds that during this census period (1996 to 2001), even though the racialised population of Canada was growing faster than the national average, racialised groups did not advance proportionately in the labour market and continued to have higher rates of unemployment, and experience a double digit income gap. The gap occurred regardless of educational attainment, and was identifiable among those who are university educated as well as those with high school education. The report also finds that the labor market is largely segregated by race. Racialised groups are over-represented in low paying occupations such as textile, light manufacturing and service sector jobs, and under-represented in better paying, more secure jobs, such as legislators, supervisors and senior management positions. The report also concluded that the inability for internationally trained professionals and tradespeople to utilize their skills in the Canadian labour market contributes to the income and employment status gap between educated Canadians and similarly educated recent immigrants.

Keywords: Racial discrimination, Employment opportunities, Canada

**Varga-Toth, J., Amaratunga, C., Neumann, B., Clow, B. (2005). 'A healthy balance: A summary report on a national roundtable on caregiving policy in Canada'. Research Report F|53. Ottawa, Canada: Canadian Policy Research Network. Available at:**  
[http://www.coag.uvic.ca/eolcare/documents/SummaryReportCGinCanada\\_000.pdf](http://www.coag.uvic.ca/eolcare/documents/SummaryReportCGinCanada_000.pdf)

The paper summarizes the National Roundtable on caregiving policies in Canada. During the session participants raised a number of important issues. The social conditions in Canada were viewed as difficult for families and especially women because of increased expectations to care for the elderly. Also the health care system diminished and employment was seen as not supporting balance between work and life. The roundtable participants provided various solutions such as coordinated and adequate funding from the government along with guidelines for the provision of sufficient caregiving services. Corporate social responsibility was also seen as crucial. It was suggested that government enacts policies so that employers improve conditions for caregivers and that there is flexibility of employment, funding for community-based services and programmes and a system of financial support for the caregivers.

Keywords: Caregiving services, Social policies, Canada



**Vleminckx, K., Smeeding, T.M. (2001). 'General conclusions: what have we learned and where do we go from here?' In Vleminckx, K., Smeeding, T.M (2001) *Child Well-being, child poverty and child policy in modern nations*, 527-547. Bristol, UK: The Policy Press.**

Most contributions in the book discuss the policy implications and formulate policy suggestions. The thorough examination of cross-country poverty among children proved that the Nordic countries had a very low level of child poverty and the highest poverty was found in Germany, Spain, Italy and the UK. In the second half of 90's many European government committed themselves to reduce child poverty – Ireland, UK, Belgium. The idea to introduce poverty benchmarks within EU would facilitate the formulation of multi-agency strategies against poverty. Some contributions argue that income poverty lines are not completely capturing the dimension of poverty. The use of non-monetary indicators of deprivation could correct the partial picture of poverty. It has also been brought to attention that studies should be undertaken on the length of poverty. Monitoring process should be based on a range of poverty measures. The next step would be to identify the right policy tools to reduce child poverty. Measurements aimed at increasing the employment and earning capacity of parents are key ingredients. Especially the labour position of mothers should be improved. Increasing job demand for low-skilled workers is also an important condition. State need to facilitate parental leave and childcare support – a great example of application given by Scandinavian countries. In the case were the minimum-wages are not sufficient, countries should think of increasing them or giving other opportunities to working poor. There is evidence for an increasing role of reduced taxes and refundable tax credits in the support given to low-income families. Many contributors underline the importance of child related cash benefits. Enforcement measures are important if the non-resident parent is reluctant to provide child benefits. Also promotion of socially oriented education policy is judged very important. Overall the policy makers will have to base their efforts on a variety of direct and indirect policy measures. More work is needed on the consequences of child poverty in the long term. Some problems faced by researchers include the lack of data.

Keywords: Poverty, Social policy implications, Child benefits, OECD countries

**Vleminckx, K., Smeeding, T.M. (2001). 'Introduction: ending child poverty in industrialised nations'. In Vleminckx, K., Smeeding, T.M., *Child Well-being, child poverty and child policy in modern nations*, 1-7. Bristol, UK: The Policy Press.**

The book examines through various case studies the impact and trends of tax transfer programmes for children and families and policy reform regarding children's well being in the 90's. The volume contains articles which present a comparative analysis of child poverty in OECD countries as well as a group of countries in 'transition'. According to research analysis child poverty remains stable in most countries through the decade. The highest poverty is observed for non-working households. Overall, income transfer and tax policies appear to be



more effective at the end of the decade. The case studies prove that increased spending on children has a major impact on the reduction of poverty. It is prescribed for the governments which spend little on child related benefits to spend more and those which already do so to increase targeting. Through various articles different authors bring our attention to the following causes judged of high importance to the measurement and reduction of child poverty. The need to utilize a simulation model which operates on the European level to explore the effects of the benefits in a comparable manner in different EU countries. The book also includes discussion on different level of policy intervention and the variation in policies supporting children within states in the US. Another chapter provides comparative study of anti-poverty effectiveness of three states: Italy, Sweden and the UK by focusing on income transfers and policies supporting maternal care. The book includes also the cross-national analysis of child support provisions and investigation of the trends in public investment in child and family benefits in the 90's.

Keywords: Tax transfer programmes, Child poverty, EU countries

**Waldegrave, C., Stephens, R., King, P. (2003). 'Gauging New Zealand's success at poverty reduction in the new millennium'. *Australian Journal of Social Issues*, 38 (4), 433-464.**

The authors examine the anti-poverty policies initiated in New Zealand from 1999. The income-related rents on state houses and promotion of employment-rich economy are judged to be particularly successful. There was also introduced a Primary Health Care Strategy which aims to reach all of the New Zealanders, however it can not be yet fully assessed. The commitment to address the rates, thresholds and indexing of the key monetary transfers for children in 2004 is the most important future antipoverty initiative. Some challenges are being described as providing housing for low-income families and a multi-sector approach to development of education and training to lift economic and social capacities taking into consideration the Maori minority. Author claims that the Labour-led coalitions addressed the critical areas of poverty in New Zealand. Their approach is seen as broad-based, involving a mix of financial assistance, active labour market initiatives and in-kind housing and health transfers. The government developed an integrated redistributive programme that is delivered in measured way. The public in New Zealand is supportive of government's policies and therefore the government can continue with the chosen social policy changes.

Keywords: Poverty reduction, Government policies, New Zealand



**Whealan, C.T., Maitre, B. (2008). ‘New’ and ‘old’ social risks: life cycle and social class perspectives on social exclusion in Ireland’. ESRI Working Paper 226. Dublin, Ireland: Economic and Social Research Institute. Available at: <http://www.esri.ie/UserFiles/publications/20080219090652/WP226.pdf>**

The life cycle concept has come to have considerable prominence in Irish social policy debate. However, this has occurred without any systematic effort to link its usage to the broader literature relating to a concept. Nor has there been any detailed consideration of how we should set about operationalising the concept. In this paper we make use of Irish EU-SILC 2005 data in developing a life cycle schema and considering its relationship to a range of indicators of social exclusion. At the European level renewed interest in the life cycle concept is associated with the increasing emphasis on the distinction between ‘new’ and ‘old’ social risks and the notion that the former are more ‘individualised’. An important variant of the individualisation argument considers globalisation to be associated with increased but much more widely diffused levels of risk. Inequality and poverty rather than being differentially distributed between social classes are thought to vary between phases in the average work life. This position contrasts sharply with the emphasis on cumulative disadvantage over the life course. Our findings suggest that both the ‘death of social class’ and cumulative disadvantage over the life cycle theses are greatly over blown. A more accurate appreciation of the importance of new and old social risks and the manner in which they are both shaped by and influenced by welfare state strategies requires that we systematically investigate the manner in which factors such as the social class and the life cycle interact. Our evidence suggests that such an approach rather than leading us to jettison our concern with social class is likely, as Atkinson (2007) argues, to leave us more impressed by the degree to which the ‘slayers’ of class are themselves ‘riddled with class processes’.

Keywords: Life cycle, Social exclusion, Ireland

**Williams, C. (2008). ‘Asset-building approaches and the search for a new social policy architecture in Canada’. Ottawa, Canada: Canadian Policy Research Network. Available at [http://www.cprn.org/documents/49582\\_EN.pdf](http://www.cprn.org/documents/49582_EN.pdf)**

The study summarizes briefly the post-war challenges for social security in Canada and follows with describing six challenges faced by the Canadian government in the present times. Those challenges are childhood development, low-paid work, childcare, persistent poverty and at-risk groups, retirement and finally skills and learning. The author examines the already existing asset-building approaches and provides additional ideas for their application. First approach focuses on shifting from consumption programmes to investment programmes; the asset-building enables people to improve their productivity. Secondly the asset-building approach combines the focus on point-in-time income support with assisting



individuals to save for the future and reduce the risk of continuing poverty. Finally, it also empowers individuals and provides a chance to exit poverty trap.

Keywords: Asset-building, Social policies, Canada

**Williamson, D.L., Salkie, F.J., Letourneau N. (2005). 'Welfare reforms and the cognitive development of children'. *Canadian Journal of Public Health. Revue de Sante Publique*, 96 (1), 13–17. Available at:**

<http://journal.cpha.ca/index.php/cjph/article/view/581/581>

The article investigates whether the cognitive development of young children in poverty is affected by activities of their primary caregiver and by household income source, which are two components of family poverty experience affected by recent welfare reforms. Bivariate and multivariate analyses were used to examine the relationships that caregiver activity, household income source, and family characteristics (family income adequacy, caregiver depressive symptoms, caregiver education) have with the cognitive development of 59 impoverished children under three. Of the three poverty experience variables included in the multivariate analysis, only employment as the exclusive source of household income had an independent relationship (positive) with children's cognitive development. Two of the family characteristics, income adequacy and caregiver education, also were associated with the children's cognitive score, and they were both better relative predictors than the employment-only income source variable. Income adequacy was positively associated and caregiver education was negatively associated with children's cognitive development. Although recent welfare reforms, in combination with economic growth and declining unemployment, have changed the poverty experience of young families by increasing the proportion that secure at least part of their income from employment, our study provides preliminary evidence that these reforms have made little difference for most young impoverished children. Instead, our findings suggest that the cognitive development of young children is influenced as much by the actual amount of household income as by their parents' activity and source of income.

Keywords: Social welfare, Poverty, Pre-school children, Development





## 4 Policy Transfer

**Evans, M. (2004). 'Introduction: is policy transfer rational policy-making'. In Evans, M. *Policy Transfer in Global Perspective*, 1-8. Ashgate Publishing Company.**

The author introduces the idea of policy transfer as practice dating back to Aristotle times. It has been rational choice for most of the developed countries to engage in policy transfer and look outside for the expertise. Developing countries are in a more difficult situation and often can't engage in policy transfer because they are compelled by supra-national institutions and various donors to introduce policy change in accordance with provided 'guidance'. The author argues that even in this situation they can improve their situation if they engage in evidence-based discourse. The book provides the understanding of policy transfer as a process of organisational learning, how and why such processes are studied and an evaluation of its use by policy-makers. The first argument points to the fact that policy transfer can be rational only if the policy is transferred in compatible way with value system, culture and builds on existing organisational strengths. Additionally, in most cases local solutions must be found. The second argument focuses on the study of policy transfer in distinction to normal policy-making through movement of ideas between systems of governance through policy transfer networks and intermediation of agents of policy transfer. The aim of the study is to provide an interdisciplinary framework for studying processes of policy transfer. Second aim is to provide an explanatory model of policy transfer and finally to present a broad range of empirical case studies of policy transfer. The book provides the first account of policy transfer in the global sphere. The discussion is around review of policy transfer literature and includes 10 empirical chapters and a concluding chapter. The chapters analyse the transfer of policies between developed countries, from developed to developing and southern perspective – transfer between developing countries and from developing to developed.

Keywords: Policy transfer, Developing , Developed countries

**Evans, M. (2004). 'Understanding policy transfer'. In Evans, M., *Policy Transfer in Global Perspective*, 10-41. Ashgate Publishing Company.**

The understanding of policy transfer in this chapter is analysed using five central questions:

- How is policy transfer studied?
- Why do public organisations engage in it?
- What form of policy oriented learning emerges in process of transfer?
- Does the policy transfer framework provide useful insights into contemporary policy development?



- In what ways can the policy transfer be improved?

Furthermore according to author policy transfers analysts refer to three different processes of transfer:

- Voluntary transfer of lesson-drawing,
- Negotiated transfer, and
- Direct coercive transfer.

Much of the study undertaken so far focuses on voluntary policy transfer between developed countries. The study of policy transfer from developed to developing countries and from developing to developing and developed has largely been ignored. Policy transfer analysis focuses on three areas of study:

- Description – how policy transfer is made,
- Explanation – why policy transfer occurs, and
- Prescription – how policy transfer should be made.

Furthermore author recognizes four main approaches employed in policy transfer analysis:

- Process-centred approaches – transfer based on personal interaction in decision settings where there exists ‘common kinship’ and agreed culture,
- Ideational approaches – systems of ideas influence how politicians learn how to learn,
- Comparative approaches – case study analysis and cross-national aggregate comparison, and
- Multi-level approaches- – understanding outcomes of policy transfer through combining different levels of enquiry (macro, meso, micro).

The author suggests that policy transfer analysis has been criticised in the following ways:

- It can not be distinguished from normal forms of policy-making;
- It fails to advance an explanatory theory of policy development
- It fails to provide rigorous tools of whether policy transfer has occurred or not.
- There is too much attention on developed countries transfers and too little for the on those of developing countries.

Much policy transfer analysis can not define precisely what it is describing. The increase in policy transfer activities is argued to be due to: global, international or transnational forces,



state-centred forces, the role of policy transfer networks in mediating policy change and micro-level processes of policy oriented learning.

Keywords: Policy transfer, Processes of transfer, Global level

**Evans, M. (2004). 'Conclusion – Policy Transfer in Global Perspective'. In Evans, M., *Policy Transfer in Global Perspective*, 212-226. Ashgate Publishing Company.**

The author concludes that policy transfer analysis can be a separate domain if it focuses on movement of ideas between systems of governance through policy transfer networks. This should involve the study of voluntary and coercive completed transfers, failed transfers and 'in process' transfers. Policy transfer analysis is the most comprehensive if undertaken through multi-level model analysis. The policy transfer network approach helps to simplify a complex process of policy development to comprehend the policy-making processes. It is prescribed to identify the following processes to understand policy transfers: the scope of search activity and the way in which they undermine successful policy change, agenda setting with the focus on the types of actors and their possibilities, the density of the policy transfer and the relationship between the actors. Through the case studies is provided the content of what is transferred including policy design and content, policy instruments and programmes, institutions, policy style, ideology, negative lessons, rhetoric and ideas. The transfer takes place through four methods – copying, emulation, hybridisation and inspiration. The author identifies the following obstacles to policy transfer: limited search activity,; the receptivity of existing environmental structures and institutional cultures,; lack of political, economic, human, technological resources,; complexity,; lack of regard for indigenous practices; and the existing policy system. The case studies provided insight on how to develop the type of learning organisation conducive to the facilitation of successful policy transfer. Some difficulties in policy transfers include the answers to 'why' the policy transfer takes place, as well as the demonstration that it happened. Finally, the processes analysed in the book do not provide a general theorisation of policy change that accounts for all processes of policy transfer.

Keywords: Policy transfer, Obstacles in policy transfer, Analytical tools

**Lana, X., Evans, M. (2004). 'Political transfer between developing countries: The transfer of the Bolsa Escola Programme to Ecuador'. In Evans, M., *Policy Transfer in Global Perspective*, 190-207. Ashgate Publishing Company.**

The main empirical contribution of this chapter is the development of an original case study of the voluntary transfer of the Bolsa-escola from Brazil to Ecuador. Section one develops a multi-level framework that combines Dolowitz and Marsh's (1996, 2000) policy transfer network approach with the consideration of macro and meso-level context of policy transfer drawn from Evans and Davies (1999) along with methodological tools to evaluate the role of



knowledge institutions as transfer mediators– in this case Brazilian Missao Crianca (NGO established by Cristovam Buarque to implement Bolsa-Escola). The chapter also reviews political transfer and its structural context as well as impact of policy transfer on policy outcome and policy environment. The problem to adequately analyse policy transfer lies in the lack of sufficient access to policy participants especially because policy transfer networks are ad-hoc and cease to exist once the transfer completed (or fails). In section two, the author analyses the Missao Crianca and the role played by Brazilian policy entrepreneur – Cristovam Buarque. Section three describes the transfer of Bolsa-Escola to Ecuador where the need to provide the help to poorest households was reinforced by the World Bank (WB). The pilot programme was in 2001 sponsored by UNICEF. The Inter-American Development Bank and WB project reports suggest that Ecuadorian government had little flexibility into where to look for lessons, however because of the complex situation and governmental changes in Ecuador, the financial support of international donors was withdrawn and the government decided to continue the policy transfer within its own budget. Therefore in the end it was ‘negotiated transfer’. Certain features of the Brazilian programme are missing in Ecuador, however overall goals, instruments and implementation strategies remain very similar. The chapter provides multi- level approach for the study of policy transfer in developing countries. It provides the focus not only on formal actors but also on knowledge institutions in advocating, disseminating and implementing policy change. The constraints in the policy transfer between developing countries are on the levels of economic, structural and social differences.

Keywords: Policy transfer, Developing countries, Ecuador, Brazil

**Lowe, S. Hudson, J. (2004). ‘Policy transfer’. In Lowe, S. Hudson, J., *Understanding the Policy Process: Analysing Welfare Policy and Practice*, 165-183. Bristol, UK: Policy Press.**

In this chapter the policy transfer is presented through the analysis of works by Dolowitz and Marsh (1996, 2000) and completed with Evans and Davies’ (1999) model. According to Marsh and Dolowitz policy transfer is a loose term that refers to a range of complex phenomena and it includes: lesson drawing, policy ‘bandwagoning’, policy emulation, policy harmonisation, ideas, policy diffusion and coercive transfer. They view them all as different dimensions of policy transfer. The analytical framework includes six questions:

- First question is why to engage in policy transfer. According to Marsh and Dolowitz it happens as lesson -drawing from programmes that worked elsewhere. Authors define three categories of transfers: voluntary transfer, coercive transfer or a mixture of two.
- Next question is: who is involved? The authors mention ‘insiders’ such as politicians, civil servants, party officials; ‘outsiders’ – think tanks, pressure groups, corporations



(pressure groups and corporations may be sponsoring think tanks) and global players – NGO's, experts, entrepreneurs, consultants, IMF or WHO among others.

- Third question is about what is being transferred. It is suggested to distinguish between policies and programmes being transferred and within those two policy instruments, programmes and institutions may be transferred also negative lessons can be transferred.
- Degree of policy transfer depends on the method through which transfer is happening: copying, emulation, combinations, inspiration.
- Another question is asking where the policies originate from – between countries, however may be also lessons from the past within the country.
- The barriers to transfer and its completion (the final question) depend on policy complexity, past policies interfering in transfer, institutional and structural settings, language failure also due to: uninformed transfer, incomplete transfer, inappropriate transfer.

Critiques of Marsh and Dolowitz model argues that in trying to offer a very comprehensive framework the credibility of concept is stretched a little too far,; the boundaries of where policies begin and end needs to be more clearly drawn; also proving that transfer has occurred may be problematic. To cope with this criticism author suggest to use Evans and Davies model (1999) which gives a multi-level approach to the analysis of policy transfer and explore the links macro-level changes and micro-level policies. According to Evans and Davies caution needs to be taken when analysing instances of policy transfer where the term ought to be used to refer to purposive, deliberative action which lead to instances of lesson drawing or coercive transfer.

Keywords: Policy transfer, Dolowitz and Marsh model, Evans and Davies model

**Nedley, A. (2004). 'Policy transfer and the developing country experience gap: taking a southern perspective'. In Evans, M., *Policy Transfer in Global Perspective*, 165-187. Ashgate Publishing Company.**

The author stresses that literature lacks the reference for the South-North movement of policies. The case studies are preceded with introduction to the Lesson-Drawing Approach. The lessons are drawn by several types of agents. In most cases they are responsible for 'pushing' the ideas from the developed to developing countries. The chapter continues with the description of Health Action Zones - HAZ in the UK and the Tanzanian Community Based Health Care model of health care. The Tanzanian model shares many of the community participation and partnership elements exhibited in HAZ. For many years Tanzania has followed the UK model of NHS in health delivery services. It is only in the 90's that country opted for health sector reform and for community-based initiatives in collaboration with the



recognised financial power, ideological purpose and development skills of non-governmental organisations. The learning opportunities for UK are identified as: policy-making process, the focus on primary care, the political shift from competitive to collaborative delivery strategies and priority-setting within NHS. The chapter emphasizes the need to broaden the search and incorporate a wider range of policy informants. Less formal ideas, interests, behaviours, perceptions and cultures, which change as much as policies should be taken into consideration. Practical lessons are identified as: more in depth review of developing countries experience, gaining novel perspectives from the south, periodic exchange of personnel and learning not only from positive but also from negative lessons.

Keywords: South-North dynamics, Policy transfer, Lesson- drawing

**Pal, K., Behrendt, C., Léger, F., Cichon, M., Hagemeyer, K. (2008). 'Can low income countries afford basic social security?' Social Security Policy Briefing, International Labour Office. Geneva, Switzerland: Social Security Department. Available at: [http://papers.ssrn.com/sol3/papers.cfm?abstract\\_id=807366](http://papers.ssrn.com/sol3/papers.cfm?abstract_id=807366)**

The ILO paper examines whether low-income countries can afford social security and the ways in which they could finance it. The introduction emphasises the necessity of social security for the poorest and its importance for the reduction of poverty. The second part of ILO paper reviews the affordability of social security in low-income countries through two costing studies in Africa and Asia (total of 12 countries). The study examines four components of basic social security floor including: basic old-age and disabled pensions, child benefits, access to essential health care and social assistance/100 days employment scheme. The analysis of the current spending on basic social protection in the 12 countries reveals that at the moment the countries spend less than 4 percent of their annual GDP on those services. The implementation of the above mentioned services would cost them between 3.7 percent and 10.6 percent (depending on the country). The calculations include the increase in percentage GDP spending for each sector and the final increase in expenditure for all four sectors. If the countries decide not to increase their spending on the social services they would need to draw heavily on the external resources. In case of increasing the spending by 20 percent of government expenditure then by 2010 countries such as Guinea, India and Vietnam could finance 100 percent of universal basic social protection, Senegal in 2030. In the third part the ILO micro-simulation results for Tanzania and Senegal by Gassman and Behrendt (2006) show that a set of basic cash benefits would have an immense effect on poverty reduction with the result of 35 percent reduction in Tanzania and 40 percent in Senegal. The conclusion points out that the social protection package is affordable for most of the low-income countries but only on the condition of joint effort and help from the international donor community.

Keywords: Low-income countries, Social security, Asia, Africa





**Peck, J., Theodore, N. (2001). 'Exporting workfare/importing welfare-to-work: exploring the politics of Third Way policy transfer'. *Political Geography*, 20 (4), 427-467.**

(see UK section)

**Townsend, P. (2007). 'Social security in developing countries' in *The right to Social Security and National Development: Lessons from OECD experience for low-income countries, Part 8, 32-38, Issues in Social Protection. Discussion Paper 18. London, UK: International Labour Organization. Available at: [http://papers.ssrn.com/sol3/papers.cfm?abstract\\_id=958252](http://papers.ssrn.com/sol3/papers.cfm?abstract_id=958252)***

The chapter examines existing social security systems in a number of developing countries and their shortcomings. The major problem in developing social security in India comes from the fact that India collects only 8-9 percent of GDP in taxes, compared to 22 percent in China and 14 percent generally in low-income countries. In Latin America Brazil gives a good example of means-tested benefits for children – ex. Bolsa Escola Programme, Bolsa Familia that reaches 11 million households, Continuous Cash Benefits Programme for people aged over 65 and with severe disabilities. In Africa there have been some measures of social insurance scheme. The paper claims that some challenges in establishing social security schemes include difficulty in reaching agreements on trade and the exact needs and rights to income of people employed directly and indirectly by Trans National Corporations (TNCs). Difficulty lies in rebuilding and strengthening tax administration. The author stresses the need for joint funding of social security between countries and new forms of international taxation. According to the author, the current and historical practices in OECD countries prove that social security and not only safety nets and means-tested measures are successfully preventing poverty in most of the countries, and the best results are found in the countries with the highest contributions towards social security. Furthermore the paper argues that the path of low-income countries to social security should be different than in OECD countries because of existence of global economy, including powerful TNCs. For this to happen: contribution based social insurance needs to be provided from wages by employers and employees to earn entitlements to benefits. Employers of huge numbers TNCs will be required to make contributions, and contract individuals legally with benefits. Tax base can no longer be applied only to one country. Selective social assistance will depend on revenue from companies employing relevant labour and making cross- national product.

Keywords: social security system, developing countries, OECD countries



**Weyland, K (2006). 'The puzzle of Policy Diffusion'. In Weyland, K., *Bounded Rationality and policy diffusion*, 1-30. Princeton, NJ: Princeton University Press.**

The book's main argument focuses on the question of rationality within decision-making process regarding the adaptation of policies from outside sources. The author asks whether structural pressures determine decisions and suppress choice. Politicians are being seen as agents who rather than evaluate models which are systematic, balanced cost/benefit tend to assess the promise of foreign innovations more haphazardly. They tend to draw conclusion from a limited set of data and from a small sample of population. The short cuts are usually because of the flood of information and inability or willingness to process it. While making their decisions, politicians are judged to be influenced by utilitarian goals rather than normative and symbolic goals, especially in the area of social security. Diffusion is defined as horizontal and vertical patterns of propagation, focusing on adopting institutional or policy innovation influenced by the outside units' decision making taking into account the influence of inside and outside agents. Author differentiates between 'model diffusion' which entails largely replicating the original model and 'principle diffusion' with a looser form and decision-making units adapting a principle but with specific design features and institutional characteristics. In this book the focus is on pension reform seen as 'model diffusion' and health care system reform in Latin America seen as 'principle diffusion'.

Keywords: Decision-making rationality, Policies diffusion, Latin America

**Weyland, K. (2006). 'Bounded rationality in the era of globalization'. In Weyland, K., *Bounded Rationality and policy diffusion*, 215-239. Princeton, NJ: Princeton University Press.**

The book focuses on how foreign models and principles become relevant for the experts, how they are assessed and evaluated and how the decisions on adoption are being made. Despite differences between countries and issue areas, similar casual mechanisms have driven the spread of social policy innovations in Latin America. Author emphasises that external pressure from institutions has not been decisive in policy making decisions and domestic politicians have retained considerable autonomy. Concern for international legitimacy was judged to have limited impact on the decision making policy-makers and they have rather responded to the pre-existing problems. They have applied bounded not full rationality in pursuing these interests. The research disconfirms arguments that attribute pension privatisation and health reform to central coordination and vertical imposition.

Decision-making process and adaptation of outside policies depends on political, institutional and economic differences. The depth and urgency of the problem conditions openness to reform and affect socio-political forces participating in its design and might even turn into authoritative decision making. The argument continues with assumption that in places where social programmes achieve satisfactory performance, sector specialists demand participation



in reform design and it also involves broader range of actors. The author suggests that scholars need to investigate how individuals perceive their context, what stimuli they pay attention to, what inferences they derive, and how they design their responses. The policy diffusion mostly happens in geographic clusters because neighbours are linked by networks of experts, government officials, and civil society organisations. Globalisation does not advance in a uniform wave, but as a much more differentiated, fragmented process. Author concludes by stressing the importance of lessons to be learned from third world countries where the meagre social protection systems are easier to dismantle and may undergo radical transformation and therefore have a greater ease of reform. Further this can be reimported to the first world nations.

Keywords: Decision-making processes, Policies diffusion, Latin America

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