

Workshop Report*

National Institute on Aging/Brookings Institution Joint Event: “Workshop on the Use of Well-being Measures in Policy Analysis”

The “Workshop on the Use of Well-being Measures for Policy Analysis”, referred to herein as the Workshop, was held November 2nd and 3rd, 2011, in the Kresge Room at the Brookings Institution in Washington, D.C. The event was co-sponsored by the National Institute on Aging (NIA) and the Brookings Institution, and was co-chaired by Lisbeth Nielsen of the NIA and Carol Graham of the Brookings Institution .

The purpose of the Workshop was to debate the advantages, challenges and pitfalls of utilizing subjective well-being metrics for policy analysis. Dialogues built on discussions at a prior NIA and ESRC-supported National Academy of Sciences workshop on the policy potential and implications of well-being metrics. At this meeting, consensus emerged that subjective wellbeing measures could be useful and appropriate for targeted populations and targeted policies. Yet considerable skepticism remained regarding their potential to capture meaningful information from societies at large. One goal of the current Workshop was to evaluate the potential of well-being metrics to evaluate targeted policies.

Participants included those well versed in subjective well-being research and policy, as well as those who brought alternative expertise to inform on the usefulness and limitations of the approach. Names and affiliations of Workshop participants can be found in Appendix I; the Workshop agenda is listed in Appendix II.

Co-chair Carol Graham opened the Workshop posing two objectives. First, she called on participants to assess the robustness of subjective well-being metrics currently in use. Second, she spoke about how the Workshop sought to debate whether subjective well-being should be an objective of policy and a measure of progress, and, if so, how the findings generated from this field can best be applied to policy. Consistent with the National Institute on Aging’s goals to advance life course policy-relevant research on subjective well-being, a focus on identifying areas for additional research pervaded all sessions of the Workshop.

The following presents a summary of the Workshop discussions.

* This report was prepared by **Julie Markowitz (Brookings Institution)** and edited by Carol Graham (Brookings Institution) and Lis Nielsen (National Institute on Aging).

Executive Summary of Findings

Workshop participants agreed that capitalizing on current political interest in subjective well-being (SWB) by facilitating introduction of SWB metrics into policy design and analysis was a priority, while also recognizing the need for additional research. The merits of public debate on subjective well-being concepts and their policy relevance, including how best to use subjective well-being metrics, were highlighted. Such dialogue could be facilitated by local level dissemination of data collected on well-being metrics. Key areas identified for future study include:

- Causal models that allow for the anticipation of policy impacts on well-being, especially how well-being influences behavior and how this process varies across cultures.
- Development of models for incorporating subjective well-being metrics into cost-benefit analyses.
- Understanding adaptation, its impacts on reported well-being over the short and long term, and how, from a policy perspective, to appropriately account for adaptation to objectively bad circumstances.
- Enhanced understanding of whether and how aggregated, national-level well-being metrics can be used constructively.
- Improved theories about which aspects of well-being (e.g. life evaluations or momentary affective experiences) matter most for which aspects of people's lives.
- Continued research on how individuals interpret survey questions on well-being, the role of framing effects, and the extent to which measures are comparable across time, geography and culture.
- More deliberate integration of theories of affect into models of experienced well-being, with an eye to improved measurement; similarly, work on the relation and distinctions between affect and self-evaluation.
- Capitalizing on natural experiments or local policy interventions to examine the usefulness of incorporation of well-being metrics in policy analysis.
- Research on what constitutes a meaningful change on a metric, to be policy relevant, as well as what constitutes an appropriate comparison (e.g. within person change vs. differences between groups).
- Incorporating issues of equity and sustainability into the well-being approach to policy analysis.
- Strategic thinking on how to present well-being data to the public and policy makers in a practical and meaningful manner.

Participants agreed that the field should take on the role of facilitating the best possible use of such measures based on available evidence. For this reason the Workshop was consequential in that it was a first step in determining how to facilitate that process.

Background

Workshop participant Norman Bradburn recalled how he was the first psychologist he knew of to include the word “happiness” in the title of a book, for which he received much criticism at the time. Jumping forward five decades to the present, research on happiness, and, more broadly, subjective well-being, has become a burgeoning field. The United Nations called for happiness to potentially be introduced as the 9th Millennium Development Goal. There is discussion of incorporating measures of subjective well-being in the Human Development Index. The British government’s Office of National Statistics adopted a measure of well-being (assessed with four survey questions) into its national surveys and will present the information from its initial survey to the public shortly. Bhutan adopted the policy objective of optimizing Gross National Happiness, using national well-being surveys to set development priorities.

These are just a few examples of the growing global support for the use of subjective well-being as a policy tool. Nevertheless, significant research is required to refine well-being metrics, increase understanding of causal models, and develop effective means for applying this knowledge to policy.

Most Workshop participants agreed that the current political opportunity, wherein there is significant international interest in subjective well-being, should be capitalized on despite this need for additional research. As participant Henry Aaron explained, “There will always be uncertainty,” and it may only be through the formal induction of well-being into the policy debates, that the metrics can be refined and the substantial answers flushed out.

Value of Subjective Well-Being Measures as Identified by Workshop Discussion

Workshop participants identified the value added by implementation of subjective well-being metrics in order to justify the measure as a focus of research and policy.

Foremost, subjective well-being metrics provide new insight into individual preferences and sources of joy and misery above and beyond what can be inferred through “willingness to pay” calculations. In particular, subjective well-being measures shed light on conditions that are difficult to monetize, such as trust and social cohesion. For example, as David Halpern noted, the costs associated with running a rural post office do not take into account the pleasure individuals derive from the social interactions facilitated by a visit to this local meeting site.

Many policymakers already implicitly weigh the public’s preferences and their impacts on well-being when designing policies; the intent of well-being research is to enable policymakers to assess these preferences explicitly. Importantly, subjective well-being measures may be most successful when they enable researchers, policymakers and the public to understand how people assess the effects of events or policies without explicitly asking people to focus their attention on

those events. Well-known focusing errors and framing effects that can otherwise bias judgments when people are asked about policies directly can thus be avoided. Often the results are counterintuitive, as several workshop examples revealed. For example, as John Helliwell noted, an objectively tragic event, such as a natural disaster, can sometimes lead to increases in reported well-being in a community, presumably through increased community cohesion and a recalibrating of values associated with surviving a catastrophe. Yet the same event can result in well-being declines in other areas, perhaps due to differences in pre-existing conditions in the societies. Such examples challenge our notions of what factors count most for happiness or life satisfaction. They also challenge researchers to develop richer causal models that incorporate information on circumstances against which events have their impact. Alternatively, lack of change in national well-being after a major national tragedy raises concerns that metrics are insensitive to the things that really matter to people. For example, such measures can never fully account for the disutility of lives and property lost. However, there was general consensus that when measures are appropriately administered, they offer the potential to come closer to discerning the actual impact of particular policies on particular aspects of well-being, rather than the impact individuals may feel they are expected to report.

Subjective well-being measures also provide insight into why individuals, communities and even entire countries remain in objectively bad equilibriums. Such insight may be particularly relevant in a developing-country context where the keys to improving well-being, like quality healthcare, proper governance and equal access to employment, are already apparent, yet reasons why these obvious changes are not being undertaken is not as clear. Well-being surveys may be able to provide some explanation for such unknown determinants.

For example, research reveals an adaptation to crime in high-crime regions, wherein crime victims in high-crime areas see smaller or no changes to their subjective well-being levels compared to crime victims in lower-crime areas. The result may explain the apparent paradox: residents in high-crime regions perceive crime as a low policy priority and are less thus demanding that crime be reduced.

Workshop participants generally agreed that subjective well-being measures are not meant to replace current metrics in use, such as measures for income and health outcomes, but to complement them. Subjective well-being metrics can play a critical role at differentiating between policies at the margin. For instance, if two different policy interventions each increase income, do they both have the same anticipated impact on subjective well-being?

Finally, the Workshop discussion emphasized that while subjective well-being measures are able to provide insight into many areas, they are still limited in their ability to capture levels of equity and sustainability.

Improving Subjective well-being Metrics

Much of the Workshop discussion focused on improving metrics to make them more robust and policy relevant. There was consensus that the methodology used in assessing well-being, including the questions posed, should be tailored to a given purpose.

This conclusion, while consistent with micro-level assessments and applications of well-being metrics, may be inconsistent with macro-level applications that aggregate well-being to measure progress at the national level. Targeting questions and controlling for the characteristics of heterogeneous populations at the national level makes interpretations of these results much less straightforward.

Thus, consistent with 2010 NIA/ESRC National Academy of Sciences meeting on similar well-being issues, the Workshop was unable to endorse macro-level subjective well-being applications as particularly informative and worthwhile policy tools.

A possible solution to bridge this gap, endorsed by many at the Workshop, would be to collect well-being data at the national level (that is, by the federal government, as being done in the U.K.), and then share it locally in community meetings and the like.

The Workshop continued the debate on what type of subjective well-being, experienced affect or life evaluation, was most important to capture and use for policy analysis. Most agreed that these measures are simply different with each one providing valuable information. This lack of conclusive preference for one type over the other is, in part, derived from the need for further research to identify which definition is more closely associated with behaviors, health, physiology and other outcomes, and whether these associations hold across cultures.

Specific recommendations related to data collection methodology were also generated. First among the recommendations, when attempting to measure affect, questions should be included to measure both positive and negative affect and the development of measures should be more closely guided by extant theory on emotion.

Public debate is necessary to properly weigh which elements of affect are most valued or undesired by a given society or population subgroup. Arthur Stone reported on research showing that although different positive affect questions tend to trend together, questions related to diverse elements of negative affect do not; thus additional research is required to better understand the lack of convergence in negative affect responses.

A concern was also raised that fixed-scale questions were not flexible enough to detect changes in well-being following extremely traumatic events, while others responded that ladder-scale questions were adequate to account for major changes.

Several participants, including Jacqui Smith and Arthur Stone, discuss the need for appropriate methodology involving reconstruction aimed at capturing experienced well-being, arguing surveys should not ask respondents to recall memories from more than one day prior, as this has the potential to evoke a more evaluative response mode. Surveyors should be cognizant of the day of the week when the survey is administered to avoid biased results (people tend to be happier on the weekends), as well as be specific on whether a question appears to ask respondents to analyze a particular day or their life generally. Additionally, Smith emphasized, surveys, especially those measuring affect, should attempt to capture these emotions alongside information on the context of the activities and rhythm of the respondent's day.

Because subjective well-being questions are subject to framing, it is critical that they always be posed at the beginning of a survey in order to avoid priming of the questions that follow, or that some form of buffering questions intervene to reduce the potential of framing biases. Also, the mere fact of who is collecting the survey may matter. People may give different responses if the survey is conducted by a government statistical agency, a health organization, or a private survey firm.

The Workshop discussion did not focus at length on independent variables that should be included in surveys measuring well-being, although it was emphasized that this is an important issue for consideration in the future. To achieve better causal frameworks on well-being, increased information on respondents and their communities is required. This will facilitate analysis regarding the causal role different aspects of well-being play in various domains of behavior and health, as well as the impact of circumstances on subjective well-being. Several participants also expressed belief that it is important to include a subjective well-being question specifically related to relationships, as this emerges prominently in public discussions about what matters most in their lives. Assessments of social connectedness, community cohesion, loneliness and trust are relevant indicators in this context.

Finally, participant Paul Dolan, whilst recognizing the multi-dimensionality of well-being, also advocated a single index to report well-being in order to make the research more accessible to policymakers. Dolan suggested that, although some information will be lost, the convenience gained in easier interpretation of the findings will facilitate greater usage of these measures.

Participant Charles Kenny was among the strongest opponents to this approach, arguing that, “it is a disservice to subjective well-being” to reduce it to a single number. Kenny made the argument that complexity is inherent in well-being and, in order for policy applications to effectively utilize well-being metrics, this complexity must be incorporated properly. While the need for brief measures in surveys was widely appreciated, most participants agreed that the multi-dimensionality of subjective well-being requires metrics that tap a range of relevant dimensions.

What We Have Learned From the Metrics on Subjective Well-being and Adaptation?

Well-being measures have revealed some consistent trends. First, uncertainty is bad for well-being; people generally prefer certain displeasure to uncertainty. These results have been shown to be broadly applicable, from feelings related to the economy to decisions on methods of transportation. For instance, according to participant Gary Burtless, people would rather spend a definite 40 minutes commuting in their car than wait for a bus that may take 20 to 60 minutes. There is also broad consensus that positive social relationships contribute positively to well-being. Finally, there is consensus that the causal model of independent variables related to subjective well-being runs in both directions. Also, as Carol Graham highlighted, change is typically experienced as negative. This may explain the fact that during periods of transition and

development in societies, well-being may suffer, as many individuals see their everyday assumptions challenged, and circumstances are changing in ways that increase uncertainty for many.

Many other conclusions related to associations between subjective well-being and other variables remain under debate. For instance, there is disagreement on the impact of inequality on well-being. Angus Deaton raised a number of concerns about how to distinguish income inequality in a society from inequality in a person's own income relative to him- or herself over time. The policy implications of the two comparisons are like to be quite different. Moreover, it is unclear how a policy analysis should weight the well-being of individuals in different sectors of society or at different levels of the social hierarchy. Importantly, none of the extant data pick up on the growing inequality of the very top of society. This, among other points of disagreement, requires additional research to be conducted as well as better-defined causal models.

A major complication in interpreting well-being metrics is the influence of adaptation on well-being, a point which was discussed at length throughout the Workshop. This discussion made clear that a comprehensive and agreed-upon theory relating to the process of adaptation is missing.

For example, the problem of how to weigh the well-being of those who have adapted to positive or negative events against those who have not adapted was brought up and ended without any consensus reached.

Another discussion centered on the argument that adaptation causes people to value aspects of their lives differently, thus causing the many contributors to well-being to vary from person to person. Participant Carol Graham explained, "People with agency and means value work and health, and weight their overall well-being accordingly, versus people with less agency who focus more on family, friends and religion." Several psychologists present then argued that adaptation is functional for survival and can be beneficial to individuals.

Participant Richard Lucas highlighted the inconsistency in discussions of the evidence for adaptation and offered clarifying distinctions. In the first case, which one may consider to be "strong adaptation," is the process whereby people react to an event but then return to a pre-event set-point after an event occurs. The second type identified by Lucas, possibly deemed "weak adaptation," is defined as a situation where people are not as miserable "as would be expected" following a traumatic event -- they may, in fact, be reasonably happy -- but they have not returned to an original set-point. Finally, a third sort of evidence for adaptation may in fact represent something quite different, and not be relevant to theories of adaptation at all. These are affective forecasting errors, in which people anticipate events to have more impact on their emotional experience than they in fact turn out to have. Such errors may derive more from processes people engage in to justify their behaviors when seeking to explain why they are acting as they do.

The Workshop highlighted the need for greater understanding of and precision in defining adaptation, as well as the relationships between well-being, variously measured, and other variables.

Areas for Research

A key accomplishment of the Workshop was taking stock of areas in need of research related to well-being and its application to policy analysis. Research is required in the areas of data collection (described above), on predicting and interpreting the substance of results, on effective means of sharing the data with the public, and on applying the data to policy.

Workshop attendees endorsed the critical need for the development of causal models that allow for the anticipation of results and account for the characteristics of subjective well-being metrics, including nonlinearity, heterogeneity, adaptation and its costs, etc., as policymakers rely on causal models to justify specific policy interventions. Ross Hammond presented his experience with complex systems modeling as one possible tool to developing causal models.

Additionally, research is needed in the realm of presenting this information to and incorporating feedback from the public, particularly focusing on the American context. There was a call for public debate on well-being, specifically to discuss what types are most valued, their potential relevance in particular policy domains, and the key expected contributors in America, similar to the public discussions held in the U.K. prior to the collection of well-being data there.

Workshop participant Aileen Simpkins from the UK Office of National Statistics argued that it is critical to gain buy-in on the value of well-being metrics from the public and policymakers prior to the collection of data, in order for the ultimate findings to carry weight. Most Workshop participants supported the local level distribution of data. This process allows people to contextualize and act on the findings as they relate it to their lives and communities. Gallup researchers Shane Lopez and Jim Harter emphasized that this approach has been a cornerstone of Gallup's efforts to engage communities around well-being metrics.

More research is also needed on specifically presenting the data in a practical and easy-to-understand format to the general public. For instance, researchers and policymakers may want to educate the public and present metrics so that a growth in well-being from 7.2 to 7.4 provides as much meaning as would a 2 percent growth in GDP. Small-scale experiments may also be necessary to better understand how access to information related to well-being will directly affect people's behaviors, if at all.

Finally, several research questions arose related to application of well-being measures to policy. Researchers and skeptics want to know if and when subjective well-being measures would ever be decisive in policy decisions over other measures, such as income indicators. There was considerable discussion of the potential for small scale natural experiments to play a role in policy evaluation, and the challenges of extending the results of local experiments to the population at large. David Halpern and Paul Dolan argued that it is entirely possible to design experimentation into early stages of policy interventions by imposing systematic structure such as as varying the dosage and putting well-being metrics into place to facilitate evaluation.

Researchers also called for greater understanding of the ways governments could facilitate positive adaptation and how much policy should emphasize reducing misery versus increasing life fulfillment.

Significant debate persisted throughout the Workshop on the usefulness of macro-level aggregate well-being metrics, as discussed above. If policymakers do decide to utilize this approach, additional research will be necessary to increase the robustness of the measures and to develop causal models to understand and anticipate changes in national well-being.

Challenges Identified

The challenges identified at the Workshop can be characterized as measurement, philosophical and policy challenges.

One potential measurement challenge that was highlighted is the notion that the general public may not be answering life evaluation questions correctly. Workshop attendees speculated that people may not be familiar with the topic of life evaluation and therefore do not fully understand the questions that are being asked. Potentially, this issue could be overcome with the introduction of public debate on the issue of subjective well-being.

Additionally, when answering life evaluation questions, respondents may not be considering happiness or life satisfaction as the single objective they maximize in their life, while researchers may be interpreting the responses in this manner or using the results to this end. This creates a chasm between the intentions of the respondents and the interpretations of these responses by the researchers.

There are several obstacles related to the substance of what is captured by subjective well-being measures. First is the ability for these measures to capture losses, especially when taking adaptation into account. For example, following a natural disaster, well-being may decline only slightly as people impacted feel negative about the loss of life and property but feel positive about the growth of community solidarity. In related cases, GDP may be necessary to fully account for the loss of life and property.

Additionally, researchers face obstacles when addressing what psychologists referred to as differential item functioning (DIF), wherein a variable is defined differently from person to person and across cohorts. Researchers also face hurdles in predicting and measuring counterfactuals, such as how happy married people would be if they had never married.

Those researching well-being face significant challenges in incorporating sustainability into their models. This is both a measurement dilemma as well as a philosophical one. If a population is made happier by increased income at the expense of sustainable growth, can and should this discount be formally incorporated into the well-being models?

In regards to the U.S. context specifically, researchers, policymakers and the public face the question of what type of subjective well-being, experienced affect or life evaluation, should be a

policy goal. In a country that promotes the pursuit of happiness but does not equip its citizens with the same opportunities to participate in this pursuit, raising the importance of happiness through its measurement may result in some Americans feeling an overall decrease in life satisfaction.

In the policy realm, the foremost challenge will be addressing accusations of paternalism that often surface among critics of well-being research. Additionally, there is a need to take into account the costs to income, to well-being, and to other outcomes that will be endured by those individuals who may not experience an intervention but must pay for it. There will also be a need to address the charge that this additional measure has little value-added and is instead gumming up an already complex regulatory system, particularly in the U.S.

Finally, even if the measurement of well-being and its application to policy is found to be effective and well-received by the public, there is the challenge of preventing abuse of the tool. This was succinctly projected by participant Henry Aaron who stated that, “As with any measure that is politically significant, it can be subject to abuse.”

Overcoming this and other challenges, including ensuring that the results and interpretations remain unbiased, will all be necessary to maintain the credibility of this field.

Next Steps

Looking forward, the Workshop closed amid overall agreement that much research was required to improve the metrics, causal models, and policy applications of subjective well-being. Research initiatives recommended by the Workshop’s experts are summarized above.

Many agreed that the present movement to incorporate subjective well-being measures into policy should be embraced by experts across the field, despite a lack of conclusive theory and numerous calls for additional research. The current interest in subjective well-being as a policy objective should be viewed as a political opportunity that can be built upon through the providing of opportunities for new research.

Efforts to move forward with well-being metrics as a policy objective specifically in an American context may benefit from a public debate on the matter. Such a bottom-up and community focused method may help ensure that the subjective well-being measures are designed to address specific goals, which all Workshop participants agree is critical to making the measures robust, relevant and insightful.

Appendix I

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Workshop on the Use of Well-being Measures for Policy Analysis

November 2 – 3, 2011

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Appendix II

WORKSHOP AGENDA

November 2 Brookings, the Kresge Room

12:00 Participants arrive, buffet lunch available

12:30-1:30 Introduction

Introduction to the workshop: Carol Graham (Brookings), Lis Nielsen (NIA)

A Word about the NAS panel: Chris Mackie (NAS)

Participants introduce themselves

1:30 – 3:30 Session 1 - Well-Being Metrics: Experience to date and Unanswered Questions

Chair: Lis Nielsen

Discussion openers: Arthur Stone (Stonybrook), Jacqui Smith (Univ of Michigan) and Jim Harter (Gallup)
Review of currently available short measures of SWB, including various approaches (i.e. experienced vs. evaluative) and content domains (emotional well-being, eudaimonic well-being, life satisfaction, physical symptoms), in terms of their applicability as policy-relevant metrics.

Norman Bradburn (NORC)– reactions to the measures to date

Open Discussion

4:00- 6:00 Session 2 – Applications of Metrics to Policy: What are the Metrics Currently Being Used For?

Chair: Carol Graham

Discussion openers: Paul Dolan (LSE); David Halpern (UK Prime Minister's office); Richard Lucas (Michigan State); Aileen Simkins (ONS)

Discussion of experiences in getting measures into national statistics, public reactions to the measures, and concrete applications of measures to policy analyses.

Open Discussion

Reflections on Sessions 1 and 2 : Gary Burtless (Brookings)

6:45 Reception followed by dinner, Tabard Inn

November 3 Brookings, the Kresge Room

9:00 Continental Breakfast

9:30-11:30 Session 3 – From Metrics to Policy: Well-Being as an Objective of Policy and a Marker of Progress?

Chair: Paul Dolan

Discussion openers: Angus Deaton (Princeton); Carol Graham (Brookings), Ross Hammond (Brookings)
Considerations of research needs to enhance policy applications of well-being metrics, including policy goals, measurement challenges, challenges with cross-national comparisons, and appropriate policy domains.

Open Discussion

11:45-1:00 Wrap-Up Session

Chairs: Lis Nielsen and Carol Graham

Discussion openers: Henry Aaron (Brookings); John Helliwell (UBC); Richard Suzman (NIA)

Reactions to our two days of discussion and visions for the future, with a focus on research needs and policy applications.

Open Discussion

Closing Remarks and Next Steps: Lis Nielsen & Carol Graham