How does UpTogether measure impact?

UpTogether employs surveys with a combination of close-ended and open-ended questions to understand how the UpTogether Approach impacts drivers of economic mobility over the lifecycle of a direct cash investment fund. We measure members' experiences and perspectives along three dimensions: **well-being, self-investment, and social capital.**

Well-Being | **Self-Investment** | **Social Capital**

Members are surveyed multiple times during a fund, which allows us to measure changes in their experiences with economic mobility. Depending on the length of the fund, members are surveyed at three points: baseline, midline, and endline. For example, during a 12-month fund, members receive surveys in their first, 6th, and 12th months of payment.

Our surveys are carefully crafted by UpTogether's Analytics team through a member-informed process. Unlike many current research efforts that study economic mobility through a deficit-based approach, UpTogether employs a strength-based approach in its impact measurement. We let our members tell us how cash investments have impacted their household economic mobility. Our surveys are designed to uplift the stories of impact that members most want to share with policymakers and philanthropy through a user-friendly experience.

Well-Being

Surveys at baseline, midline, and endline ask members about their financial well-being, housing stability, food security, mental health, and childcare situation.

INDICATORS OF MEMBER WELL-BEING

Category	Indicators
Income and affordability	• Household income • Difficulty affording household expenses • Methods of meeting spending needs (income, benefits, saving, borrowing) • Experience with benefits cliffs
Employment	• Paid employment (number of jobs, hours worked) • Unpaid caregiving responsibilities
Housing stability	• Housing situation (rent, own, temporary housing or homelessness) • Housing affordability (housing costs < 50% monthly income) • Caught up on rent/mortgage payments • Multiple moves and reasons for moving
Food security	• Food insufficiency
Mental health	• Symptoms of anxiety (mild, moderate, severe) • Symptoms of depression (mild, moderate, severe)
Childcare	• Challenges experienced with childcare • Changes in childcare situation (access, quality, coverage, reliability) • Enrollment in preschool, daycare or after-school care/extracurricular programs

Self-investment

Members are asked about their goals and progress while receiving cash investments.

INDICATORS OF SELF-INVESTMENT

Category	Indicators
Manage or improve their housing situation	• Changes in housing situation • Changes in ability to manage housing costs • Changes in status of rent/mortgage payments
Continue education, pursue training or certification	• Type of education, training or certificate pursued • Progress on education, successes and challenges
Change employment or business situation	• Changes experienced in employment situation (new employer, new business, or change in hours worked) • Reason for change in employment situation
Pay off debt or catch up on bills	• Level of debt • Type of debt or bills focused on • Changes in ability to budget or plan financially
Save for the future	• Purpose of savings • Frequency of saving contributions • Percentage of income contributed to saving
Improve transportation situation	• Primary source of transportation • Car purchase or repairs
Other goal	• Description of goal • Progress on goal

Social Capital

UpTogether defines social capital as the resources found in trusting networked relationships. It is the value of things we do together and for one another.

We measure how members support others in their communities and how their relationships with friends and neighbors change while receiving investments. We also measure members' involvement in community activities like organizing, volunteering, religious worship, and social/recreational activities.

We know that members build community both in person and online. We measure how members engage with the community as part of UpTogether's digital platform, *UpTogether Connect*, to understand their demand for our digital product and improve its features.

INDICATORS OF SOCIAL CAPITAL

Category	Indicators
Social capital exchange	• Impact of cash investment on others outside of household • Sharing information, resources, and support with community • Strength of relationships with neighbors and/or community members • Changes in frequency of social capital exchange
Community involvement	• Involvement in civic activities, community betterment, religious activities, recreational groups, education-related activities, cultural activities, health and wellbeing, neighborhood groups, and local business support • Changes in community involvement or frequency of involvement
Digital engagement	• Number of Groups joined on UpTogether Connect • Number of posts and comments on posts

Spending

Members are asked if they used their cash investment for the following spending categories: housing, daily living needs, family caregiving, transportation, leisure, education, debt and financial management, and supporting others.

In addition, members are asked about their spending decisions and how they prioritize spending needs across areas related to well-being, self-investment, and community. This allows UpTogether to measure changes in how members prioritize spending decisions over the course of a direct cash investment fund.

Survey Questions

UpTogether's surveys are designed to obtain high-quality data while minimizing respondent fatigue. Survey questions include a combination of validated scales, indicators, and open-ended survey questions. Validated scales for indicators of affordability, mental health, and food security allow for comparison with data collected by the US Census.

For example, the surveys ask four questions about mental health at baseline, midline, and endline. These questions are grouped together to look at trends in symptoms of anxiety and depression using a validated scale from the US Census. In the analysis of the midline and endline surveys, we are able to look at how the frequency of anxiety and depression symptoms has changed for members over the course of the fund.

Over the **last 2 weeks**, how often have you been bothered by... Feeling nervous, anxious, or on edge? *Select only one answer.*	Over the **last 2 weeks**, how often have you been bothered by not being able to stop or control worrying? *Select only one answer.*	**Indicator:**
Not at all	Not at all	→ No anxiety symptoms
Several days	Several days	→ Mild anxiety symptoms
More than half the days	More than half the days	→ Moderate anxiety symptoms
Nearly every day	Nearly every day	→ Severe anxiety symptoms

Over the **last 2 weeks**, how often have you been bothered by having little interest or pleasure in doing things? *Select only one answer.*	Over the **last 2 weeks**, how often have you been bothered by feeling down, depressed, or hopeless? *Select only one answer.*	
Not at all	Not at all	→ No depression symptoms
Several days	Several days	→ Mild depression symptoms
More than half the days	More than half the days	→ Moderate depression symptoms
Nearly every day	Nearly every day	→ Severe depression symptoms

Survey Questions

Open-ended survey questions surface information not explicitly asked about in categorical survey questions and allow us to understand the impact of direct cash investments on topics such as parenting, child development, and familial relationships.

Baseline survey question:

We understand that finding quality care for kids of all ages sometimes comes with its own set of challenges. Could you share some of the difficulties, if any, you encounter in ensuring quality care for the kids under 18 you are responsible for? Are there any care resources or forms of support that you find lacking or wish were more accessible?

Midline survey question:

We know that every person is different. Please describe what this money allowed you to do in your specific situation and how the funds impacted you (e.g., family caregiving, transportation, etc.)

UpTogether's baseline, midline, and endline survey instruments are technical documents programmed in Qualtrics. The full surveys can be made available to partners upon request. Our Analytics and Partnerships teams are available to answer questions on the survey methodology and work with partners to develop an approach to meet learning objectives for a cash investment fund.

Analysis & Reporting

UpTogether's Analytics and Partnerships teams work together to analyze data from surveys and prepare reports on findings. Reports include data visualizations and key impact metrics, grouped by category. See an example of the Housing stability section of a standard baseline report here: