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Thematic studies conducted by the SFLP

Livelihood systems' profiling

Mixed methods for the analysis of poverty and vulnerability

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Abstract

This document presents a set of methods for the characterization of livelihood systems experiencing situations of poverty and vulnerability. Such concepts are fluid and vary according to different epistemologies of reality. The methodological work that informs this document respects the plurality of voices that can emerge in the process of understanding the complexity of livelihood systems. It does so by utilizing contextualities and contingencies as the production ground from which definitions of poverty, vulnerability and food security emerge. These ideas materialize in the application of "fuzzy sets" statistical analysis as well as in the utilization of "Likert scale" modules to determine relative poverty levels in a given population. Both methods permit the treatment of poverty and vulnerability in their multiple dimensions, showing how the levels of poverty and vulnerability experienced by an individual or a household in the same sample vary according to the variables considered.

The approach uses the Sustainable Livelihood Approach as its underpinning conceptual framework. The SLA model proved very useful for the analysis of the multiple dimensions of poverty and vulnerability. It provided the foundations for demonstrating the linkages between different aspects of poverty and vulnerability both in horizontal terms (between various domains of poverty) as well as vertically (between the micro, meso and macro levels). The "zero-in" approach proposed in this document follows a similar logic in organizing the modalities of data collection, ensuring that those sets of linkages are fully explored. The methodological work developed in this paper is based on the adoption of the livelihood system as the conceptual tool for clustering individuals into meaningful groups, and the collection of information to construct profiles.

The profiling work proposed here is also based on the conviction that opinions of poor and vulnerable people are important and crucial in the analysis of the dynamics that affect their lives. Particular emphasis is placed on the collection of people's perceptions of reality either through qualitative and mixed methods. Furthermore, the methodology illustrated in this document attempts to go beyond the use of households as units of analysis, and advocates for the use of individual voices as the raw material for capturing differential perceptions of how the world and its categories are constructed.

Profiling livelihood systems attempts to go beyond a search for consensual views of poverty and vulnerability, attempting to evidence how these co-vary with instances of ethnicity, gender, and age among others. The combination of qualitative and quantitative methods for the analysis of livelihood systems permits a search for inconsistencies, differential epistemologies, and contrasting views that constitute an integral part of how reality is constructed and negotiated by groups of people in unequal power positions in society.

Introduction

This document presents a set of methods for the characterization of livelihood systems experiencing situations of poverty, vulnerability or food insecurity. Such concepts are fluid and vary according to different epistemologies of reality. The methodological work that informs this document respects the plurality of voices that can emerge in the process of understanding the complexity of livelihood systems. It does so by utilizing contextualities and contingencies as the production ground from which definitions of poverty, vulnerability and food security emerge (Narayan et al. 2000). These ideas materialize in the application of fuzzy sets statistical analysis as well as in the utilization of Likert scale modules to determine relative poverty levels in a given population. Both methods permit the treatment of poverty and vulnerability in their multiple dimensions, showing how the levels of poverty and vulnerability experienced by an individual or a household in the same sample vary according to the variables considered. These are not simple subtleties. Actions targeting the reduction of poverty need to be based on more than a simple classification of an individual or a household below or above a poverty line. The methodological pathways explored in this paper permit the identification of what exactly accounts for an individual or a household's poverty or vulnerability (e.g. health issues, educational issues, social exclusion, etc.). The way this is achieved is presented in chapters 2 and 3.

The methodological work developed in this paper is based on the adoption of the livelihood system as the conceptual tool for clustering individuals into meaningful groups, and the collection of information to construct profiles. Methodological work to operationalize this line of thinking led to the realization of Livelihood Systems Profiles (LSP).

Identifying and characterizing the poor or vulnerable is crucial for designing and implementing actions to improve their situation and reduce their number. Because policies and programs do not commonly target single individuals, it is necessary to identify meaningful groups for policy and program action. By choosing the livelihood system as a classifying tool, it is possible to cluster individuals with similar characteristics into groups that are subject to similar factors and processes affecting their poverty and vulnerability. Within a livelihood system, however, the analysis can be focused on either households or individuals depending on the scope and nature of actions envisioned.

The profiling work proposed here is also based on the conviction that opinions of poor and vulnerable people are important and crucial in the analysis of the dynamics that affect their lives. Particular emphasis is placed on the collection of people's perceptions of reality either through qualitative methods such as focus group discussions and individual semi-structured interviews, or through the use of semi-quantitative methods such as scaleable attribute modules. The combination of qualitative and quantitative data in the process of analyzing livelihood systems, however, is more than a cross-check for validity testing. It represents the search for inconsistencies, differential epistemologies, and contrasting views that constitute an integral part of how reality is constructed and negotiated by groups of people in unequal power positions in society. Thus, profiling livelihood systems attempts to go beyond a search for consensual views of poverty and vulnerability, attempting to evidence how these co-vary with instances of ethnicity, gender, and age among others.

While this paper is methodological in nature, it refrains from being prescriptive in the ways in which a profiling exercise can be conducted. The information required and the nature of decision-making differs according to whether the process involves policy formulation, project development, monitoring and evaluation, among others. Information requirements also differ according to the institutional affiliation and responsibilities of the user, and the administrative level - whether international, national, provincial or local - at which decisions are being made¹. Consequently LSPs need to maintain a high level of flexibility at all stages of their realization (data collection, elaboration, and presentation). To that avail, chapter 1 addresses some of the key issues underpinning the compilation of a LSP. Chapter 2 introduces the reader to a set of possible tools and pathways that can be followed to compile a livelihood system's profile. Finally, chapter 3 looks at forms for presenting the information contained in a LSP in effective manners. LSP may take the form of policy briefs, analytical reports, or awareness-raising pamphlets, using textual analysis as well as visual aids such as graphs, maps, charts. In an age where the amount of information produced greatly outdoes the capacity of the reader to absorb it, Chapter 3 illustrates a set of possibilities for packaging information to characterize livelihood systems in ways that reduce the amount of time required of its potential readership.

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