

**HEALTH AND LIFESTYLES OF
PEOPLE AGED 50 AND OVER**

**ELSA LIFE HISTORY INTERVIEW
(P2596)**

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1. BACKGROUND AND INTRODUCTION TO THE LIFE HISTORY INTERVIEW

1.1 *Background and introduction to ELSA*

The English Longitudinal Study of Ageing (ELSA) is a study of people aged over 50 and their partners. The aim is to interview the same group of people every two years to explore **the health, lifestyles and financial situation** of people as they grow older. The field name of the study is 'health and lifestyles of people aged 50 and over'.

Originally we were funded for two waves of data collection for ELSA: the Wave 1 survey began in 2002 (interview only) and the Wave 2 survey began in 2004 (interview and nurse visit). We were awarded funding for two further waves: the one in progress now is Wave 3 which began in May 2006 (and involves an interview and a life history interview); and Wave 4 will begin in 2008 (and will involve an interview and nurse visit).

Half of the funding for ELSA has been provided by the US National Institute on Aging which also funds the Health and Retirement Study, which is a similar study to ELSA carried out in the US. A consortium of UK government departments has provided the other half of the funding for ELSA.

The study is a collaboration between the National Centre for Social Research, the Department of Epidemiology and Public Health at University College London (UCL), the Institute for Fiscal Studies (IFS) and academics from Cambridge University. The principal investigator in the research team is Professor Sir Michael Marmot, Head of the Department of Epidemiology and Public Health and Director of the International Centre for Health and Society, UCL.

1.2 *Background to the life history interview*

So far, most of the information we have collected for ELSA has been about the circumstances of respondents' lives from the time we first interviewed them for the Health Survey for England (HSE) until the present day. At HSE, all the ELSA respondents were over 46 years old and some of them were already in their nineties. As a result, we know little about what happened earlier on in their lives. Many aspects of early life have been shown to have a significant impact on people's health, economic circumstances and quality of life in later years. The life history interview will enable us to gather more detailed information about important events that have occurred in ELSA respondents' lives and what their childhood was like. This data will be used to enhance our understanding of how early life and events throughout life have influenced the circumstances of older people.

The life history interview will collect data in a number of different areas including relationships and fertility; housing and mobility; jobs and earnings; and health. Collecting accurate information about all these different types of events is a challenge. People do not remember events from the past perfectly. Therefore, we are trying to use a special method of gathering this information, called the 'Life History Calendar' (or 'lifegrid'), which has been designed to help people remember past

events more accurately. As its name suggests, this method is in the form of a calendar, which shows time across the top and multiple rows down its side which make it possible to record different kinds of events in respondents' lives (e.g. where they lived, family events). As respondents answer questions about key life events, these events are written on the Life History Calendar. This enables respondents to cross-reference certain life-events with others (e.g. "when I had my first child I was living in house B"). The calendar also shows important external events, for instance, when JFK was assassinated, which may help respondents recall the timing of personal life events. Using the life history calendar technique has been shown to improve the accuracy of the information people can remember.

We have spent some time developing the life history interview for ELSA. We have had two pre-tests, a pilot and a dress rehearsal. The main stage fieldwork period for the life history interview is between February and August 2007. Approval from the Multi-centre Research Ethics Committee has been received for the mainstage to take place.

2. WHO TO INTERVIEW

2.1 *Sample*

The sample is made up of three groups:

- (i) Respondents who answered that they were willing to take part in the life history interview when asked at the end of their main ELSA Wave 3 interview.
- (ii) Respondents who had a productive Wave 3 interview but said they were not willing to take part in the life history interview **AND** live in the same household as a respondent who was willing to take part in the life history interview.
- (iii) Respondents who refused to take part in the ELSA Wave 3 interview **AND** live in the same household as a respondent who was willing to take part in the life history interview.

The first group is by far the largest, making up over 90% of the sample. Respondents who were not willing to be approached for the life history interview or did not have a Wave 3 interview have only been included **if they live in the same household** as a respondent who has agreed to take part in the study.

We appreciate that the latter two groups have not agreed to be approached for the life history interview and therefore we would not want you to approach them directly (there will be no advance letters for these respondents). However, we do not want to lose these respondents: their data is worthwhile (they have all at some point been interviewed for ELSA so we can link their life history data to this) and taking part in the life history interview may encourage them to return to or stay involved in the study. If a respondent from group (ii) or (iii) does wish to be interviewed, they will have a slot and feed forward data so you will be able to interview them.

Unlike the main ELSA interview, the life history interview is an individual interview. There are no concurrent interviews and each eligible respondent will have an individual ARF.

2.2 *Who not to interview*

All eligible respondents will have an ARF. Do not interview anyone who does not have an ARF. The following groups of people are not eligible for the life history interview:

- (i) New partners of eligible respondents (ie partners who we do not yet know about because they have begun a relationship with an eligible respondent since the Wave 3 interview). These partners will be invited to join the study at Wave 4 but not for the life history interview.
- (ii) Respondents who have moved into a care/nursing home (institution) since the Wave 3 interview. We have not included respondents who we know have moved into an institution but there may be some cases where the individual has moved into a care/nursing home since being interviewed at Wave 3.

Please record outcome code **781** in the ARF and record the address of the institution if possible. For definition of an institution please see Appendix A.

- (iii) Respondents who have died. If an eligible respondent has passed away, please use outcome code **791** and record the details of the person who informed you of this if possible. We may want to contact this person in the future to carry out an end of life interview.
- (iv) Respondents who are physically or mentally unable to do the life history interview. If a respondent is physically or mentally unable to do the interview, we **do not** want a proxy interview. Please use outcome code **530** and return this case to the office.

2.3 Contacting respondents

Personalised advance letters have been provided for all respondents who answered that they would be willing to take part in the life history interview. You will need to send out your own advance letters.

Like in the mainstage of ELSA, you have the option of telephoning the respondent to make an appointment rather than visiting in person. We would ask you not to do this if the respondent is aged over 80. The coversheet tells you whether you should contact the respondent by telephone or face-to-face.

When making appointments it may be useful to:

- acknowledge that the respondent said they were willing to be involved in the life history study at the end of their Wave 3 interview
- explain to the respondent that they will be asked very different questions from the main ELSA interview
- mention the topics covered and explain that the focus of the interview is on their life history
- tell them that the life history interview will probably be shorter than their main ELSA interview
- explain that the life history interview is an individual interview and that they will need to be interviewed alone

2.4 Preparation before the interview

The appointment card asks respondents to note down the addresses of the places where they have lived and the jobs they have had. These are often the most difficult events to remember and encouraging respondents to do some preparation before the interview gives the respondent the opportunity to consult relevant documents. This may also reduce interview length and will hopefully make the interview easier.

The appointment card does not specify that we are only interested in residences and jobs (or series of similar short term jobs) that lasted for 6 months or more. So it would be helpful to tell the respondent this.

When making an appointment, it may also be useful if you give more detail about the other areas covered by the life history interview. The most important events for the

respondents to write down before the interview are the work and accommodation modules as these are the hardest to remember in many cases. However, if you believe that a respondent would not be put off or feel overburdened, it would be useful to use the checklist below. Note that this is not a complete list of all the dates asked for during the interview; we have excluded some of the more sensitive questions.

Accommodation (asked for on appointment card)

- Year started and stopped living in each residence throughout life (only residences lived at for 6 months or more)
- Full address of each residence

Work (asked for on appointment card)

- Year started and stopped doing each job throughout life (only jobs or series of similar short term jobs had for 6 months or more)
- *IF YOU THINK RESPONDENT IS WILLING TO ANSWER:* Starting salary in each job

Children

- All dates of birth of any children (natural or adopted)
- If have adopted children, year they were adopted

Partners

- Year started living with each spouse or cohabiting partner
- Year of marriages (and divorces)

2.5 Individual (private) interviews

Unlike the main ELSA study, the life history interview is an individual interview. Some ELSA respondents will be used to being interviewed concurrently, but as far as possible we would like respondents to be interviewed in private as some of the questions are sensitive.

Although there may be some overlap between respondents in certain areas (e.g. having lived in same residences since relationship started), it is worth noting that only part of a respondent's life is spent with their partner. Furthermore, there will be some questions which a respondent may not wish to answer in the presence of their spouse or partner.

Where there is overlap, we are happy for couples to confer before they are interviewed and have encouraged this by asking respondents to prepare before the interview. However, during the interview, we would prefer to have two different accounts of an event, rather than having couples constantly conferring. We do not want you to use the first respondent's answers to check the second respondent's answers. If you notice that there is a discrepancy then do not mention this to the respondent but do use the information on the lifegrid to check the answer the respondent you are currently interviewing has given you.

To ensure that, as far as possible, interviews are undertaken in private, you can:

- make two separate appointments (trips) to the household
- ask one respondent to fill in the self-completion in a separate room (if possible) whilst you interview the other respondent and then swap over.

Because the interview is an individual interview this has some implications for the CAPI menu system. If you are interviewing two respondents in the same household in the same trip, you need to make sure that there is a gap of at least 3 minutes between the end of the first interview and the start of the second one.

Exit the questionnaire of the first respondent promptly and wait in the 'Main Menu' screen for at least 3 minutes before starting live interviewing for the second respondent in the household. This will ensure that the first call can be signed off and the two respondents will be treated as two separate calls.

There is an instruction in the CAPI to prompt you to do this if necessary after each interview.

3. FIELDWORK MATERIALS

Sample documents:

- ◆ Pink ARF – individual level, for respondents who were willing to take part in the life history interview
- ◆ Green ARF – individual level, for respondents who did not have a Wave 3 interview or were not willing to take part in the life history interview
- ◆ Coversheet

Field documents:

- ◆ Appointment card
- ◆ Advance letter
- ◆ Showcards
- ◆ Self-completion

Other:

- ◆ Key card – which gives brief instructions for the short cut keys of the life history CAPI program

3.1 *Sample documents*

ARF AND LABELS

ARFs are at an individual level so each eligible respondent will have their own ARF. There is only one label on each ARF.

Address label (see below)

This has the individual serial number, point number, name, address and telephone number. It also tells you the colour of the ARF.

S: (serial)	P: (Point)	FA: (Field area)
		C: (colour of ARF)
Name		
Add1		
Add2		
Add3		
Add4		
Add5		
Pcode		
T: (Tele)		

ARF

The ARF is based on the standard ARF.

Page 1 and 2 - On page 1 there is a box for you to write in changes of address or other additional information. There is the standard calls record on pages 1 and 2.

Section A - If the respondent has moved or the address needs to be amended then code it here and make the changes on Page 1.

Section B - If the respondent has moved, then please record your attempts to find the respondent at this section. If you do find a mover, write the new address on Page 1.

Section C & D - Outcome codes. Because this is an individual ARF, there is just one set of outcome codes for the eligible respondent. If the respondent is productive then code the self-completion status in Section C.

Section E - If the respondent has moved into an institution (i.e. nursing or care home) then they are not eligible to do the life history interview. However, we would like you to record information about the respondent so that we can attempt to interview them at Wave 4. Please record how you established they were in an institution, and the name and address of the institution if possible.

Section F - If the respondent has died the please complete Section E. If possible, we would like you to find someone who may be able to do an End of Life interview at some point in the future. If you do, please record their details in this section.

Section G - There is a refusal section as in the main ELSA ARF, which asks you to code why the respondent refused. It would be very useful for Wave 4 if completed this if the respondent refuses.

Section H - We are collecting address observation information again as the standard observation information NatCen collects has changed recently.

COVERSHEET

The coversheet is at a household level and gives you a history of the household. This should help you tailor your initial contact. They show **all** ELSA respondents in the household (this may include some respondents who are not eligible for the ELSA interview, in addition to refusers who are eligible if they wish to be interviewed, and respondents who agreed to the life history interview). The coversheet will be attached to each individual ARF. If there is more than 1 respondent who is eligible to do the life history interview in a household then they will have the same coversheet attached to both their ARFs.

The coversheet contains the following information:

Field information

- Household serial number (9 digits)
- Life history batch number
- Life history point number
- Sample – original sample member or refreshment sample (this will be familiar to you from ELSA the main interview). This is for your information only and does not affect anything in terms of the life history interview.

Respondent information

- Life history serial number (11 digits – household serial number plus the person number)

- Title, name, surname of each respondent in the household
- Sex, age
- Phone number and contact method. We have followed the same procedure used during fieldwork for the main ELSA interview. Respondents aged under 80 can be contacted by telephone initially. This will be left blank for refusers as you will not need to approach them directly. **Please note:** if you feel telephone contact would not be appropriate for a particular case then please contact them face to face. Please also check the notes section at the bottom of the coversheet – use your judgement but try to stick to the suggested approach.

Other information

- Agreed to Life History interview: **Yes**
No – interview if respondent requests*
Not eligible**

*Refused/did not have an interview at Wave 3 **or** had a Wave 3 interview but did not agree to the life history interview

**Some respondents are not eligible to take part. These respondents:

- (i) have language difficulties
 - (ii) needed a proxy interview at Wave 3
 - (iii) are in an institution
 - (iv) moved at Wave 3 and could not be located
- Wave 3 outcome:
 - This list of outcomes should be familiar to you (same as those used on the main ELSA coversheet).
 - Full int: per** = full interview was conducted in person
 - Full int: prx** = full interview was conducted with proxy respondent
 - Partial int: per** = partial interview was conducted in person
 - Partial int: prx** = partial interview was conducted with proxy respondent
 - In institution** = person was in institution at time of interview
 - Office ref** = office refusal
 - Phys/men incap** = physically or mentally unable/incompetent
 - Ref b4 int** = refusal before interview
 - Ref during int** = refusal during interview
 - Broken appnt** = broken appointment – no re-contact
 - Lang difficulties** = language difficulties
 - Untraced** = person moved and could not be traced

All respondents who agreed to the life history interview have **Full int: per**. This enables you to see why some respondents have been coded “No – interview if respondent requests”.

- Date of last interview: this date will refer to the Wave 3 interview if the respondent had a Wave 3 interview, or the Wave 2 interview if the respondent refused at Wave 3.
- Best time to call/Best day to call
- Email address – please do not use this to contact the respondent. Only use this if you cannot find the respondent - please check with the yellow team first.

Stable contact and proxy nomination details

- Note that we have included these for the purposes of finding movers only.
- There will be **no** proxy life history interviews.
- We have checked this information as much as possible however there may be some errors or some details missing. If you need to find a respondent who has moved and the information provided about their stable address contact or proxy nomination on the coversheet is insufficient, please contact the Yellow Team so

they can ask the researchers if there is any other information about the respondent which may help.

Notes

- We have included notes from Wave 2 (which were on the Wave 3 coversheet), and those collected at Wave 3.
- Please note that this information is at a household level, whilst the ARF is at an individual level. At times interviewers have entered information relating to a particular respondent but have not always entered which respondent within the household they are referring to. Please use this information with caution and do not always assume that the note refers to the respondent you wish to interview.

3.2 Incentives

There is no separate incentive for the life history interview. If a respondent does have a difficult or very long interview, we are happy for you to purchase a small gift up to £10. Please contact the Yellow Team before you do so.

4. SELF-COMPLETION QUESTIONNAIRE

The self-completion questionnaire has two sets of closed questions: relationship with parents and difficult life events, and an open question at the end. The questionnaire should take about 10-20 minutes to complete. If possible we would like the respondent to fill it in while you are in the household so that you can collect it. However, we have provided you with envelopes in case the respondent needs to return it themselves. Some respondents may not want to fill it in straight after their interview as they may want more time to think about their answer to the open question at the end.

The self-completion questionnaire can be used as a tool to provide privacy in a two person household as you can ask one respondent to fill in the self-completion questionnaire in another room (if possible) while you interview the other respondent.

The final open question in the self completion questionnaire asks the respondent to write about 3 important events in their lives using their own words. This question is based on a study of nuns which found that *how* people write about their lives can be linked to what happens to them at a later date. The way that we talk about ourselves and our lives - for example whether we use positive or negative descriptions and whether the language used is grammatically or conceptually complex – can predict well-being in later life, and even how long people live for. Please point this question out to respondents and tell them that we are really interested in what they have to say at this question.

5. COMPLETING THE CALENDAR

The program is like a normal Blaise program that you are used to working with, but, it does have some key differences:

- ◆ the respondent should, if possible, look at the screen and interact with the life grid
- ◆ your role as an interviewer is different – you will need to help the respondent remember when events happened.

5.1 *Situation in which to complete the calendar in*

It is important that the life history interview is carried out with the respondent **in private**, with no one else in the room. One reason for this is that some of the questions you will ask are of a personal nature and having someone else in the room may make the respondent feel uncomfortable, and they may also be less likely to answer the questions honestly.

That said, the interview is NOT a test of the respondent's memory. If some respondents are keen to consult their partner, for example, about the dates of birth of children or grandchildren, or the address of a past accommodation, allow them to request this information specifically and make a note so that we understand the extent to which this is happening. However do not allow the remaining part of the interview to become a 'shared' recollection.

If there are two eligible respondents in the household, you may want to give one of them self-completion to fill in while you interview the other respondent and then swap.

5.2 *Length of the interview*

We anticipate that it should take 50 minutes per respondent, however the length will vary greatly depending on the respondent. Interviews with older respondents are likely to be longer as they have more years to remember and may have more difficulty recalling events. It may also take longer for females because they are asked some extra health and fertility questions.

5.3 *Prompting using information from the life grid*

As mentioned previously, many respondents will find it difficult to remember events accurately from their past. The life grid can be a very useful tool both for helping respondents remember and checking that the answers they give are accurate. This means that you should not only rely on the CAPI script. Instead, you have an important role in trying to help respondents remember events from the past and to check for inconsistencies.

There are some key ways that you can help the respondent:

- (i) Show the respondent the lifegrid at the beginning of the interview and point things out as you go through (i.e. when events appear on the life grid) so that

they can follow the lifegrid as the interview goes on. They may be able to spot things that don't match up. This makes it important to properly explain it both at the start and as you go through.

- (ii) Proactive prompting: when the respondent gives an answer, you can immediately check it against other bits of information you have on the life grid – ie the age of the respondent, other personal events and external events.
- (iii) Reactive prompting: if the respondent cannot remember the year something happened, you can use the information on the calendar to try to prompt a response. For example, you could ask:
 - ◆ How old were you when ...?
 - ◆ Were you still at school when...?
 - ◆ Was this before or after your first child was born?
 - ◆ Where were you living when this happened?
 - ◆ Do you remember where you were working/living when JFK was shot?
- (iv) Estimating: if, after using reactive prompting, the respondent still does not know when an event happened, we would still like an answer if possible:
 - ◆ ask the respondent if they can remember their age when it happened – look at the life grid to work out the year
 - ◆ ask them to narrow down – e.g. between 1952 and 1958 – then enter the average (i.e. 1954), or ask them which decade and give the mid point.
 - ◆ Only put in DK when you have exhausted all possibilities – we would rather have a rough date than nothing (although the more accurate the better).

5.4 Instructions for CAPI program

The short cut keys that you can use in the life grid are on your pink printed key card and also appear in a helpscreen when you press **<Alt><K>**.

1. To change questions just answered use **<Ctrl> + ** to go back to the last question and delete/edit as normal. Information shown on the lifegrid will correspond with changes you make. For example, if the name of a child is changed from “Gemma” to “Jemma”, the corrected name (“Jemma”) will be shown in the personal events box of the lifegrid.
2. You can use parallel blocks to switch between modules. The key commands are as follows:

<Ctrl><1>	Children's module
<Ctrl><2>	Partners module
<Ctrl><3>	Accommodation module
<Ctrl><4>	Work module
<Ctrl><5>	Health module (<i>not shown on lifegrid</i>)
<Ctrl><6>	Other life events module

These commands take you to the start of each module.

3. If there is a lot of information in the personal events you may not be able to see all of it on the screen. You can see this information by pressing **<tab>** a number of times until the cursor flashes in the personal events box. Then you can press **<page down>** to see the information at the bottom.
4. To go to the questions about a specific event that you have entered, you can use **<Ctrl> + <E>**, as follows:

Children or Other Life Events

1. If a respondent wants to change the details entered about a child or an event in the Other Life Events module at a later point in the interview, the easiest way to edit data is to :
 - (i) For children, place the cursor (i.e. the blue outline) on the blue square of the child you wish to edit the details of. For Other Life Events, put the cursor on the lilac/pink square of the event you want to change.
 - (ii) Press **<Ctrl>+ <E>**. This will take you to the first question in the loop of questions asked about this child.
 - (iii) Scroll through the questions to find the incorrect data and change.
2. To return to the point where you had previously been in the questionnaire, press **<End>**. If you have left any blanks in the questionnaire or entered any don't knows or refusals then pressing **<End>** will take you to these questions. You can get past these by pressing **<Enter>** and then pressing **<End>** again. Alternatively, it may be quicker to use the parallel blocks to take you to the module you had previously been in and then press **<End>**.

Partners, Work and Accommodation

The principle is exactly the same as above. The Partners, Work and Accommodation modules are all continuous events and are shown by a full yellow (Partners), brown (Work) or red (Accommodation) square, and then half filled yellow, brown or red square(s). To change an event, place the cursor on any yellow/brown/red square of the partner/job/accommodation you wish to change. **This can be either on the full square or the half filled square.** Follow the same steps (ii and iii and 2) as above.

5.5 What counts as a partial and full interview

In order for an interview to be considered to be full, you need to have finished all the modules. In order for an interview to be considered to be partially completed, you need to have completed at least 3 of the 6 modules - it does not matter which 3 you have completed.

6 CAPI INTERVIEW CONTENT

There are six modules in the CAPI interview:

- ◆ Children
- ◆ Partners
- ◆ Accommodation
- ◆ Work
- ◆ Health
- ◆ Other events

This is the order in which the modules come up in the CAPI. However, you can choose to do the modules in a different order or swap between them by using the parallel blocks (see Section 4.4).

The following information will appear on the lifegrid when entered:

Module	Events that appear on the lifegrid
Children	<ul style="list-style-type: none"> ◆ Children that we knew about before the interview that the respondent confirms: Date of birth and death ◆ Additional natural children added: Date of birth and death ◆ Additional adopted children added: Date of birth and death
Partners	<ul style="list-style-type: none"> ◆ Cohabiting partners: Date started living together to date stopped living together ◆ Non-cohabiting partners: Date relationship started to date relationship ended
Accommodation	<ul style="list-style-type: none"> ◆ Residences lived at for 6 months or more: Date started living in residence to date stopped living in residence
Work	<ul style="list-style-type: none"> ◆ Job worked at for 6 months or more: Date job started to date job ended
Health	<i>Nothing appears on lifegrid</i>
Other life events	<ul style="list-style-type: none"> ◆ Date of thing that has happened in their lives that they want to tell us about - can enter up to 3 events. If this is an ongoing event or an event which happened more than once then the date entered is when the event first occurred

6.1 Children module

For this module you will need to check the details of the children we already know about (which have been fed forward from the Wave 3 dress rehearsal) and enter any additional adopted or natural children onto the calendar. Respondents will also be asked about whether they have fostered children. Women will be asked about any stillbirths, miscarriages and abortions.

The reason why we are collecting all this information is because fertility history is a very important determinant of people's health and economic circumstances later on in life. For women, the age of their first pregnancy is a predictor of health outcomes. This information also tells us about respondents' social networks, and about life crises (i.e. if children have died).

We are only asking about children's names so that they can be plotted on the lifegrid. If respondents do not want to tell us the name of any children then that is fine - you could just use an initial or the number of the child.

6.2 Partners module

For this module you will need to enter details of the respondents' spouses or cohabiting partners onto the calendar. Respondents will also be asked about any non-cohabiting relationships they have had which they consider to be important.

Information about partners is useful for us as it tells us about respondents' social networks, whether they brought up children alone and whether their relationships were stable.

As with children's names, we are only asking about partners' names so that they can be plotted on the lifegrid.

6.3 Accommodation module

For this module you will need to enter into the CAPI the start and end date for each accommodation that the respondent lived at for 6 months or more. For each of these accommodations you will be prompted to ask the respondent for more details including the address and whether it was owned or rented. Please record as much of the address as the respondent can remember, so if they cannot recall the street, record town or county if possible.

If a respondent lived at one (or more) residence(s) for less than 6 months you can enter this by:

1. Coding no at **Rastt** ("Did you move straight into your next residence and stay there for 6 months or more?").
2. Then code what year they started living at their next residence which lasted for 6 months or more at the next question (**Rastb** - "In what year did you start living in your next residence that you lived in for six months or more?").
3. Then at the next question (**Ragap** - Where were you living between Year 1 and Year 2?) code that the respondent was living in short-term residences in the gap.

Similarly, if a respondent cannot remember where they were living in a particularly period then go through steps 1 and 2 above and code 'Cannot remember' at **Ragap**.

You are only able to code that the respondent was living at one place at a time. So if a respondent was living in two places in the same period (e.g. home and boarding school) you should code whether they were living most of the time.

One reason why we are collecting the address of each residence respondents have lived in is so we can see whether people have stayed in the same place or moved around a lot. We are also hoping to use the information to link to historical databases so that we can see the types of areas people have lived in - e.g. whether they were deprived/prosperous, rural/urban, and whether there was a high level of pollution or not. In order to do this, we need as much detail of the address as possible.

There is also a set of questions about where the respondent was living when they were 10 years old, whether their parents' divorced when the respondent was a child and whether the respondent was ever separated from their mother for 6 months or more before they were 16.

6.4 Work module

In this module you will need to enter the start and end date of each job which lasted for 6 months or more (see section on what constitutes a new job below). For each of these jobs you will be prompted to ask the respondent follow up questions such as whether they were an employee or self-employed, worked full time or part time, and their starting salary/income. As some of these jobs will have occurred a long time ago you will have the option to enter details of salary/income in old or new money. If you need to enter an amount in old money you will be prompted to enter the amount of pounds, shillings and pence at three different questions. When entering the period of time the payment covered, please note the following codes:

- (55) "Hour"
- (66) "Day"
- (90) "Less than one week"
- (95) "One off/lump sum"

At the end of the module the respondent will be asked what their salary was at the end of their last ever job and whether they ever left a job because of ill health or disability or because the company went out of business.

Unlike the accommodation module, you can enter overlaps between jobs.

We are collecting information about respondents' working history so that we can find out about their pension entitlements and salaries, whether they have had periods of not working and how stable their working life has been.

We collected information about starting salaries in the pilot and dress rehearsal. The feedback we received showed that some respondents struggled to remember what they earned. However, our collaborators at the Institute for Fiscal Studies (IFS) have analysed the information respondents gave us at the dress rehearsal about their salaries and found that 80% were able to estimate their starting salary at each job. Analysis of this data showed that their answers matched very well with existing income information from other data sources. Therefore, it seems that even though people may need to guess what their salary was, they do so fairly accurately. Although this information is not 100% accurate, it can still show us the differences between low and high incomes and we can still use it to plot a rough salary history for our respondents.

What constitutes a new job?

In general we would like individuals to count something as a change of job if they regard it as such. However, where queries arise, below is further guidance.

1. All changes of employer should be counted as new jobs, except in the following cases:
 - a) The employer's name simply changed.

- b) The employer merged with or was taken over by another company (which may or may not have then resulted in a change in the name of the employer).
 - c) The respondent had a succession of short term jobs for different employers doing essentially the same role. Examples might include:
 - ◆ Agency nurses
 - ◆ Supply teachers
 - ◆ Cleaners
 - ◆ Actors/musicians
 - ◆ Labourers (e.g. on farms, building sites or dockyards)
 - ◆ Temporary workers employed through an agency (count the agency as the employer)
2. In general, do not count role changes within the same employer as different jobs. However, if the respondent wishes to classify these as different jobs, allow them to do so (for example, if the respondent started as a post-boy and eventually became managing director for the same company, he/she may consider these to be different jobs).

6.5 Health module

In this module respondents are asked if they have ever received an injury which had a permanent effect on their daily life, about their childhood health (i.e. before 16), periods of ill health or disability as an adult, and smoking. Women will also be asked about menstruation, menopause, HRT and whether they have had a hysterectomy or had both ovaries removed.

We are interested in finding out about respondents' health as a child as we want to look at how this relates to their health now.

6.6 Other life events module

In this final module you will ask respondents whether there is anything else that has happened in their lives that they want to tell us about. This gives respondents the opportunity to put in other events that have not been covered in the interview but that they consider are important. You can enter details of up to 3 things that they want to tell us about, and the year that they happened (if relevant). Note that you are able to enter these at any point in the interview. At the end of this module you will be prompted to give the respondent the self-completion questionnaire if you have not already done so.

7 SUMMARY OF LIFE HISTORY INTERVIEW PROTOCOL

BEFORE THE INTERVIEW

1. When you make the appointment, tell the respondent what the interview will cover and ask them to jot down the dates of their jobs and residences (which lasted for 6 months or more) on the appointment card if possible.
2. Give the respondent the appointment card in person or send in the post.

AT THE INTERVIEW

3. If there are two eligible respondents in the household, ask one respondent to complete the self-completion while you interview the other one and then swap.
4. Go into the CAPI and check/enter respondent's details (i.e. name, sex and date of birth).
5. Go through the modules in the CAPI. You can do this in a different order than suggested by using the parallel blocks. Use the information on the life grid to check that the respondents' answers are accurate and to help the respondent remember when events were if they are having difficulties.
6. Ask respondent to fill in the self-completion questionnaire if not already done so. Collect the questionnaire when possible.
7. If you are interviewing two respondents in the same trip, you need to make sure that you wait in the 'Main Menu' screen for at least 3 minutes between the end of the first interview and the start of the second one. This will ensure that the first call can be signed off and the two respondents will be treated as two separate calls.

APPENDIX A – Definition of an Institution Address

We are using a standard definition of **an institutional address**. This is one at which:

- the establishment is run or managed by the owner or by someone who is employed to run it.
- four or more people, not all related to each other, live and are catered for **communally** (i.e. by someone else who is paid to provide them with board and lodging).

Small communal establishments with fewer than ten rooms are treated as **private households** if:

- there are fewer than four unrelated people staying there
- there are no resident staff other than the warden, proprietor etc (and his family).

In small communal establishments such as these (e.g. boarding houses and guest houses), the usual rules for deciding who is a household member apply.

One point to note: sometimes there are private households within institutions; for example, a warden of an old people's home or a school caretaker may have a flat within the home or school, with its own living room and catering facilities. These people are living in private households and are still eligible for interview when those living in the institution themselves are ineligible.

Some establishments are borderline cases because the people living there have their own **separate accommodation with facilities for cooking** (e.g. some sheltered housing for the elderly). If less than half the people living there have these facilities, count it as an institution. If at least half have these facilities, **whether or not they use them**, count them as a collection of private households.