

**NATIONAL CHILD DEVELOPMENT STUDY
(NCDS)
2004 SURVEY**

**PROJECT INSTRUCTIONS
TELEPHONE SURVEY**

JUNE 2004

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1 SUMMARY OF THE STUDY

The National Child Development Study (NCDS) is a national survey of those in Great Britain who were born between 3rd and 9th March 1958 (Cohort Members). The study is the responsibility of the Centre for Longitudinal Studies (CLS) at the Institute of Education, University of London. Cohort Members have been interviewed at different times throughout their lives.

This round of this study, when the Cohort Members are 46, will be conducted by telephone. Many of the questions in the interview were asked in earlier waves of fieldwork. (The questions are also being put to Cohort Members from the 1970 British Cohort Study by NatCen interviewers in a parallel face-to-face survey). The new NCDS follow-up will enable us to monitor changes in the Cohort Member's circumstances and compare individuals in this cohort study to others. The interview is expected to last approximately 30 minutes.

The main aim of this research is to:

- Update the information about the Cohort Members
- Uncover the pathways to different occupation, family and health statuses and citizenship in the mid-forties in contemporary Britain and determine what has shaped them
- Analyse the impact of poor self-reported basic skills on an individual's economic, social and personal life
- Compare the experience of the NCDS cohort with that of the BCS70 Cohort Members

1.1 Sample

This is a named sample which consists of 12,768 Cohort Members – 6,425 male and 6,343 female. They are located across England, Scotland and Wales.

- 9,309 were last contacted in 2002-2004 as part of the NCDS medical follow-up study, which involved the Telephone Unit and our nurses, but did not include any of the topics covered by this survey.
- 11,419 took part in the 1999/2000 face-to-face survey conducted by NatCen, on which this survey is based.
- 1,118 were last interviewed in 1991, and 459 in 1981. None of these took part in the medical survey.

1.2 Fieldwork

The pilot fieldwork was carried out in May and lasted for approximately one week. Main stage fieldwork will begin on 28th June 2004, and will be carried out in four waves. Wave 1 = June, Wave 2 = August, Wave 3 = September, and Wave 4 = October. Fieldwork will be completed at the end of 2004. The advance letter will be sent out one week before the start of each wave, so Cohort Members should have received it by the time you start work.

1.3 Documents

For this study you will need:

- These project instructions
- A copy of the advance letter
- A copy of the calendar
- The education show card
- A copy of the telephone number codes and disability codes

1.4 Contact

1.4.1 Initial contact

The first stage is to speak to the Cohort Member directly wherever possible. Try not to reveal anything about the survey to other household members.

1.4.2 Contact with the Cohort Member

First, introduce yourself, the *National Centre for Social Research*, and the study. Explain that this is the latest stage of the National Child Development Study (NCDS). If necessary, explain that this latest stage does not involve any medical tests. Check that Cohort Members have their advance letter handy. This has a calendar on the back which is not essential for the interview but may be useful for gathering detail of some of the event histories. The first few survey questions are designed to check that you are interviewing the correct Cohort Member.

<p>Before you start interviewing please read the project instructions. Also, please keep the glossary handy as this will prove to be useful whilst interviewing.</p>
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2 ABOUT THE STUDY

2.1 Background and overview

The National Child Development Study (NCDS) is one of Britain's flagship birth cohort studies, directed by the Centre for Longitudinal Studies (CLS) at the Institute of Education, University of London. NatCen has been commissioned by CLS to carry out the latest wave of fieldwork in 2004, when the Cohort Members are 46 years old. The survey is funded by the Economic and Social Research Council (ESRC).

Britain has a unique tradition of carrying out national birth cohort studies, which follow the same group of people from birth into and through adulthood, providing a picture of whole generations. There are four such surveys:

- National Survey of Health and Development (started in 1946)
- National Child Development Study (started in 1958)
- 1970 British Cohort Study (started in 1970)
- Millennium Cohort Study (started in 2000)

The NCDS is the second birth cohort study and began in 1958, when data was collected about more than 17,000 babies born in England, Scotland and Wales between 3rd and 9th March 1958. Since then, the Cohort Members have been followed up at ages 7, 11, 16, 23, 33 and 40/41, with data collected about their health, education, social and economic circumstances. NatCen carried out the most recent face to face interview with the cohort members in 1999-2000 and this covered a very broad range of topics. Then, during 2002-2004, approximately 9, 400 NCDS Cohort Members took part in a medical survey carried out by NatCen nurses. Initial contact in this study was made by the Telephone Unit, who were responsible for setting up the nurses' appointments.

The NCDS medical follow-up has only recently come to an end and, as its name suggests, this survey focussed mainly on health matters. During the medical survey there was only very limited information collected about issues such as employment, family life or housing. This is why we are contacting the Cohort Members now – we need to update the personal information that we have.

When speaking to Cohort Members, it is important that you understand how important and influential this study has been. So far, the NCDS study has shown that, independent of other influences:

- The more interest parents show in their children's education, the better the children do in school.
- Education and training make a difference. Those with 'O' levels earn 7 per cent more than those with no qualifications. A degree can be worth 25 per cent more. Work related training boosts earnings by 12 per cent.
- Poor economic conditions at birth can disadvantage people in their subsequent employment and depress their adult incomes, but with the right support many do much better than expected.

- Truancy and poor school attendance are connected to problems in adult employment and marital breakdown.
- Stepfathers are just as involved with their step-children as other fathers.
- Mothers who smoke during pregnancy are more likely to have low birth weight babies and, by age 16, these children are smaller and do worse at reading and maths.
- Being breast fed as a baby can reduce the risk of heart disease in adult life.

2.2 The elements of the survey

The interview comprises a standard 30-minute CATI questionnaire. This includes a household grid, which is used to confirm and update the information that we currently hold about the Cohort Member and their household. The interview then updates information about the Cohort Member's education, housing, health, work and family life.

3 FIELDWORK

3.1 Documents

For this study you will need:

- These project instructions
- A copy of the advance letter
- A copy of the calendar
- The education show card
- A copy of the telephone number codes and disability codes

3.2 The Sample

The issued sample consists of 12,768 Cohort Members who meet the following criteria:

- living in Great Britain and outlying islands
- interviewed in 1981 or later (i.e. since they were 23)
- contact details confirmed since 2002.

As noted above, 9,309 were last contacted in 2002-2004 as part of the NCDS medical follow-up study, which involved the Telephone Unit and our nurses, but did not include the topics covered by this survey. 11,191 took part in the 1999/2000 face-to-face survey conducted by NatCen, on which this survey is based. 1,118 were last interviewed in 1991, and 459 in 1981 but none of these took part in the medical survey last year.

Cohort Members who have withdrawn permanently from the study have been excluded, as have the very few who were particularly challenging or unhappy with taking part in the study when last interviewed.

3.3 Initial contact

The first contact with Cohort Members will be made by letter. This will be sent out by Operations about one week before you begin interviewing.

The letter will come from the Centre for Longitudinal Studies, on NCDS headed paper, and is signed by Professors John Bynner and Neville Butler, familiar names to the Cohort Members. It will include the Cohort Member's NCDS reference number (found at the top of the letter). This is the serial number that CLS always use. In addition, the letter will carry a NatCen serial number (found in the bottom left corner. Also, see Section 3.3. below). The letter introduces the survey, explains NatCen's role and draws attention to the fact that there are no medical tests in this latest stage of the survey. It goes on to remind Cohort Members of the importance of the survey and their continued participation; and to promise that the data they provide will be treated in the strictest confidence.

Also included is the CLS Freephone number, which Cohort Members can call if they have any questions about the survey. This number can also be used by Cohort Members to pass on helpful information, for example about changes of address, phone number or their availability. If necessary, relatives can inform the office of a

Cohort Member's serious illness or death. Relevant information reported to CLS using the Freephone number will be passed to your supervisor as soon as possible. The letter also invites Cohort Members to call the Telephone Unit if e.g. they would like to arrange their interview at a particular time.

3.4 NatCen survey serial numbers

Each Cohort Member will have a unique NatCen serial number, specific to this survey. This serial number can be found on the bottom left corner of the advance letter. It is **not** the same as the NCDS Serial number issued by CLS, which is a combination of seven letters and numbers.

The NatCen survey serial number consists of six digits, plus a check letter (e.g. 219999 C). The first digit is always 2. The next digit will be 1, 2, 3 or 4 and this indicates the wave. The last four digits identify the Cohort Member.

If a Cohort Member moves during the fieldwork period, their address and telephone number will be updated. Their serial number will not change.

3.5 The Dial Screen

The dial screen includes information that may be helpful when contacting the Cohort Member and planning the interview. It is based on data held by CLS, but people's circumstances change and the information may not always be reliable. The dial screen information is for your own use only, and should not be discussed with the Cohort Member or anyone else.

The dial screen includes the following:

- Three telephone numbers provided by CLS (CLSPHONE1 - CLSPHONE3). Many of the numbers in CLSPHONE1 - CLSPHONE3 were confirmed in March 2004 or more recently. Where available, extension numbers are also provided.
- The 'best' telephone number obtained from the NCDS medical follow-up ARFs (ARFPHONE1). Please try the telephone numbers in the order that they are displayed.
- The telephone number status codes (PHONECODE 1 - 3 where available) - how CLS classifies the phone number information (see below)
- The date when the telephone number was updated, where available
- The NatCen serial number
- Whether the Cohort Member took part in the medical survey and the outcome
- The Cohort Member's name, address and gender
- Disability codes:
 - DEAF = Deaf
 - HEARING = Hard of hearing
 - LEARNDIS = Learning Difficulties
 - SPEECHDIS = Speech difficulties

Please record information on the dial screen as clearly as possible. It may be used by others in NatCen and CLS (indeed the comments recorded on the dial screen may ultimately be given to CLS as part of the data) so your entries should always be

understandable. Record as much relevant detail as possible, but do not include personal information about the Cohort Member that could contravene data protection guidelines¹. For example, you could record that the Cohort Member was too ill to be interviewed, but not that they had cancer. Similarly, you could note that the interview was difficult and you had to abandon it because of the Cohort Member's attitude, but not that the Cohort Member was an unpleasant individual.

Explanations of the telephone number status codes are provided below.

Key to telephone codes:

Type of telephone/time of day to contact

Code		Code	
AFT	<i>After 3pm</i>		
DAY	<i>Day time</i>	MOB	<i>Mobile</i>
EVE	<i>After 6pm</i>	MORN	<i>Mornings only</i>
FAX	<i>Fax number</i>	NOON	<i>After 12 noon</i>
H	<i>Home</i>	PAG	<i>Pager</i>
H-FAX	<i>Home and fax</i>	W	<i>Work</i>
H-XD	<i>Home, ex-directory</i>	XD	<i>Ex-directory</i>

Contacts other than Cohort Member

Code		Code	
B	<i>Brother</i>	P-XD	<i>Parents' number, ex- directory</i>
CARER	<i>Carer</i>	PF	<i>Parents' fax</i>
D	<i>Daughter</i>	R	<i>Relative (undefined)</i>
DAD	<i>Father</i>	S	<i>Sister</i>
F	<i>Friend</i>	SON	<i>Son</i>
GP	<i>Grandparent</i>	WIFE	<i>Wife</i>
HUS	<i>Husband</i>	WIFE-M	<i>Wife's mobile</i>
HUS-M	<i>Husband's mobile</i>	WIFE-W	<i>Wife's work number</i>
HUS-W	<i>Husband's work</i>	X-HUS	<i>Ex-husband</i>
IN-LAW	<i>In-laws</i>	X-INLAW	<i>Ex in-laws</i>
MUM	<i>Mother</i>	X-WIFE	<i>Ex-wife</i>
P	<i>Parents</i>		

Other info:

Code		Code	
N	<i>No code</i>	N/A	<i>Dead line or wrong number</i>

¹ For further information about data protection, please refer to NatCen's *Guide To Data Protection And Confidentiality: Interviewer and Nurse Responsibilities* which was published in November 2002. All panel members were sent a copy and interviewers and nurses who have joined us since that date have been supplied with a copy at Basic Training. If you have specific concerns or queries about data protection issues please let your supervisor know, or Brentwood.

4 CONTACTING COHORT MEMBERS

4.1 Arranging Appointments

All Cohort Members have been sent an advance letter and NCDS leaflet and should know about the forthcoming study.

Cohort Members have been told to contact the Telephone Unit freephone number if they want you to contact them at an agreed time that is convenient to them (although some cohort members may phone CLS with their preferred time).

You should be prepared to make a particular effort to persuade the Cohort Member to take part in the study – as you know, it is far easier to say ‘no’ by telephone than face-to-face.

If you have to make an appointment for an interview, try to arrange it for the earliest possible date, as there is only a limited amount of time for each wave. If the Cohort Member cannot be interviewed in this time, explain that we will be in touch again at a later date.

If Cohort Members have any queries that you are unable to answer with confidence, ask them to call the Centre for Longitudinal Studies on Freephone number . However, calls to this number from mobile phones will incur a charge. This number is staffed 08:30-17:30 Monday to Friday. Outside these hours an answer phone service operates.

4.2 Cohort Members who have Moved

You are expected to make reasonable attempts to contact the Cohort Member. This will require at least 12 attempts to call the Cohort Member.

If you find that the Cohort Member has moved, you should attempt to find out their new telephone number and, if possible, their new address. Ask the person you speak to, but if they are unwilling to pass on information, don't press them. If you believe they know where the Cohort Member lives please make a note of this on the dial screen. If you are unable to discover the Cohort Member's new telephone number after making reasonable efforts to do so, the case will be returned to CLS who will carry out further tracing.

4.3 Some Important Things to Remember

Getting a high response rate

This survey aims to collect information about the same person over a number of years. If they are lost from the survey in one year, it is much harder to gain their co-operation in future years. So gaining their co-operation is a high priority. If a high response rate is not achieved then we run a greater risk that the findings will be biased and unrepresentative of the British population. This is because people who do not take part are likely to have different characteristics to those who do.

Being persuasive

It is essential to persuade reluctant Cohort Members to take part, if at all possible. Please remember that these are very special people who cannot be replaced in the sample if they drop out. CLS have data on each Cohort Member dating back to 1958 and wish to return to these people in the future. You will need to tailor your arguments to the particular Cohort Member, meeting their objections or worries with reassuring and convincing points. If the Cohort Member is unhappy about some parts of the study, try to carry out as much of the interview as possible. Some of the research findings in Section 2 may be interesting to you and, if carefully used, could increase interest in the study among Cohort Members. Accentuate the positive findings, and please ensure that you discuss this information in a tactful manner, in case the Cohort Member feels that it reflects their own experiences in a negative light.

Broken appointments

If someone is out when you call for an appointment, it may be a way of telling you they have changed their mind about helping you. On the other hand, they may have simply forgotten all about it or had to go out on an urgent errand. You should leave a message that the National Centre for Social Research (NatCen) called if any appointments are broken. Try not to reveal anything about the survey to other household members. In any case, make every effort to re-contact the person and fix another appointment.

Interviewing in One or More Sessions

The interview is quite short and it may help to tell the Cohort Member that the average interview lasts about 30 minutes. On rare occasions you may need to split the interview into two separate sessions but please try to avoid this. This is because stopping the interview in this way may disrupt the flow. If you do have to split an interview, please make a note of this in the comments section and record the times that you start and stop interviewing on each occasion.

4.4 Whom to Interview and Where

As the cohort is a nationally representative sample, Cohort Members will be living in a variety of circumstances. Not all will live in a house or flat; for example, some will live in residential hostels like the YMCA, others will work in places like hotels where they are provided with a room of their own. You will also be expected to carry out interviews with people who live in institutions such as hospitals, prisons or Army Camps. See the special instructions below. The CATI program caters for these different situations.

4.5 Interviewing Alone

If possible ask the Cohort Member to sit on their own in a quiet room. The interview is about almost all aspects of the Cohort Member's life and there may be parts of the interview that they would be uncomfortable answering if others are present. We realise that this may not always be possible or that you may be unaware of people entering the room. However, if you can hear a lot of background noise, consider suggesting that the Cohort Member finds a quieter place or that the interview is completed at a different time.

4.6 Institutions

Obtaining an interview with someone in an institution may sometimes be difficult. If the Cohort Member is in a hostel (e.g. YMCA), a nurses' home or hospital, it may be possible to make direct contact with them by telephone. Sometimes you may need to speak to the warden (or equivalent) or make an appointment before you can make direct contact. If the warden requests a letter, you need to fill in a letter request form, record details of the person you spoke to and send the request form to Northampton Square. You should also contact your supervisor who will help to arrange this via the Centre for Longitudinal Studies. It is vital that you make such arrangements as early as possible.

If the Cohort Member is in

- a prison
- a secure hospital
- an Army or RAF camp or Navy base

always contact your supervisor before you begin the interview or as soon as you realise that you have made contact with one of these institutions.

4.7 Cohort Members Who Are Known To You

We do not want you to interview anyone you know personally, such as a friend, a neighbour or the son or daughter of a friend. In addition, you should not interview anyone you know in a professional capacity such as a colleague at work or your tutor at college. Refer such Cohort Members back to your supervisor immediately.

4.8 Cohort Members Who Are Not Capable Of A Standard Interview

For this study, there are no proxy interviews. If the Cohort Member is unable to take part due to physical, mental or psychological illness or disability, explain that the interview can only be done in person over the phone and code as unproductive. If the Cohort Member / carer is unhappy about this and wishes to participate in the survey, ask them to contact CLS

- On the CLS Freephone number
- By e-mail at cohort@cls.ioe.ac.uk
- By post at National Child Development Study, FREEPOST KE7770, London, WC1H 0BR

5 INTRODUCING THE SURVEY

5.1 Introducing the study

Most of the Cohort Members are aware of the importance of the study, and the unique role each one of them plays in it. This means they are usually very keen to be involved in the study. Once you have made contact with a Cohort Member, you will almost certainly get an interview. Remember, the Cohort Members are irreplaceable, and you should maintain and contribute to this accumulated goodwill.

Some Cohort Members may say that they have recently completed or refused to take part in the NCDS medical survey. They may be reluctant to take part because they believe they have already completed the latest stage of the NCDS. You should say that we only need to update the information that we gathered in the 1991 or 1999/2000 follow-up, which the medical survey did not gather. The medical survey focussed primarily on health and did not cover other areas in any detail, and it is extremely important that the cohort study continues to understand how all aspects of people's lives develop and change.

Even though the Cohort Members are aware of the survey, they may have questions and need further explanation before arranging the interview. Answer all the questions you can. If necessary refer the Cohort Member to the CLS Freephone number. Please do not feel this is an admission of failure – Cohort Members know the CLS team well and may feel most comfortable 'checking in' with someone on the CLS Freephone .

Please explain the content of the interview. Remind the Cohort Member that the interview may include sensitive topics, and that it should be completed with a minimal amount of distraction. Many of the questions are the same as or similar to questions asked in earlier surveys. They are being asked again in order to update the record of their lives maintained by the Study. If the Cohort Member wants to be interviewed somewhere other than their home, this is acceptable, as long as the location is suitable. A Cohort Member may ask if you can interview them in their workplace. If so, they need to be able to guarantee a quiet and private place for a minimum of half an hour, and to have the permission of their employer.

When you introduce the survey to the Cohort Member you should explain:

a) Who you are and who the survey is for

"I work for the National Centre for Social Research and am carrying out this latest NCDS survey on behalf of the Centre for Longitudinal Studies at the Institute of Education in London."

If the Cohort Member took part in the medical survey, you should also add

"You may have recently taken part in our health survey. There are no medical tests in this latest stage of the survey. We would just like to update the information that we currently have".

b) What the survey is about

Start by explaining the purpose of the survey. Say something like:

"As you may remember, you have helped over the years with the National Child Development Study (NCDS) – an important study which has been following the lives of people who, like yourself, were born between the 3rd and 9th of March 1958.

The purpose of this interview is to collect information about changes in your life circumstances. We want to get a picture of all the things you have done since we last spoke to you – for example, the relationships you've had, details of any children you may have had, your economic activity status such as work or looking after the home, and some questions to find out about your attitudes and opinions."

5.2 Answering Questions About The Survey

Cohort Members may have a number of questions and the following suggestions should provide some guidance. However, if you do not know the answer, ask the Cohort Member to contact CLS on the Freephone number. You may also want to speak to your supervisor for more information.

"What is the purpose of the survey?"

In most cases it will not be necessary to give any more information than that suggested above though it may also help to remember that

‘The survey aims to build up a picture of life in Britain today and is used for the planning of public services and policies’.

If Cohort Members still have outstanding queries ask them to contact the Centre for Longitudinal Studies on 0500 600 616.

"Will there be a medical examination?"

No, there is no medical examination as part of this survey. Some Cohort Members will have recently taken part in the medical survey while others refused to take part. These Cohort Members may be concerned that there will be medical tests if they take part in this latest stage. If the Cohort Member is concerned you should say:

"You may have recently taken part in our health survey. There are no medical tests in this latest stage of the survey. We would just like to update the information that we currently have".

"What questions will you be asking?"

The interviewer covers several topics including:

- Housing
- Partnerships
- Children and the wider family
- Social Participation
- Education
- Employment

"How long will the survey take?"

On average the survey will take 30 minutes. However the time will vary for each Cohort Member depending on the kind of things that have they have done over the last few years and whether they were interviewed in 1999/2000. So, if the Cohort Member was not interviewed in 1999/2000 or has experienced a lot of change in recent years, the interview may take longer.

"Who is paying for the survey?"

This project is funded by the Economic and Social Research Council (ESRC).

"Will these funders see my replies?"

No, they will not know who said what. The names and addresses of Cohort Members interviewed in this survey are known only to the National Centre for Social Research and researchers at the Centre for Longitudinal Studies. Your name and address will be kept quite separate from the questionnaire, and will never be revealed without your permission. No one's replies can be personally identified without these.

"How can I be sure you are a genuine interviewer?"

If the Cohort Member has concerns they can telephone the CLS Freephone number which is provided on the advance letter and leaflet or, if they prefer, the NatCen Operations Department.

"Why do you want to know where the Cohort Member has moved to?"

Ask to speak to the Cohort Member. If the Cohort Member has moved you will be asking the current occupants to let you know where the Cohort Member has moved to. You could be asked why they should give you this information. You should explain that you want them to take part in a survey used to plan public services and policies. You should not provide any more detail or information about the survey. Say that it is important that you contact them, so that they can decide whether to take part. However you should not mention the NCDS by name or say that the person you are looking for is part of the NCDS cohort.

6 THE QUESTIONNAIRE

To recap, the survey consists of a personal interview for all Cohort Members – covering topics such as their education, housing, health, work and family life.

Many of the questions in the interview were asked in earlier waves of fieldwork. This allows us to monitor changes in the Cohort Member's circumstances. However, the time period which the questions relate to will differ depending on when they were last interviewed.

If they were interviewed in 1999/2000 many questions refer to the time period "when we last interviewed you in 1999" (or where appropriate 2000). This ensures Cohort Members do not have to repeat details already given during the previous wave. You will need to bear this in mind when the Cohort Member is answering. Often the CATI program will not accept dates before the date of their previous interview.

If the Cohort Member was not interviewed in 1999/2000, the time period of interest will often be from 1991 (when they were 33).

6.1 Beginning the Interview with the Household Grid

In all cases you will want to interview the Cohort Member named on the dial screen. The Cohort Member is the only adult you should interview. You should confirm the Cohort Member's identity in the first few questions: the Cohort Member's first name, sex and age. Information is then collected about other members of the household, including first name, sex, age and relationship to the Cohort Member.

If the Cohort Member was interviewed in 1999/2000, the content of the household grid has been fed-forward for you. You will need to confirm whether these people still live with the Cohort Member, and check their details. When this is complete the CATI will present an amended grid, showing only those people you have confirmed as still living there. You will then need to add the details of any additional household members.

6.2 Content

The interview will cover the following topics, though Cohort Members will filter through the questionnaire very quickly.

- Housing
- Partnerships – current and ex partners
- Births and other pregnancies
- Periods of lone parenthood
- Children and the wider family
- Family income
- Employment status/employment history
- Education and training
- Access to and use of computers
- Basic skills (numeracy and literacy)
- General health
- Smoking, drinking and exercise
- Experience of crime
- Social participation
- Identity and Self-Esteem

More detail about the questionnaire is included in Section 7.

6.3 Length

The pilot study suggested that the interview will take approximately 30 minutes. However, for Cohort Members who were last interviewed in 1991 or 1981, you should expect the interview to take longer. As a result, you should warn Cohort Members to allow longer than this, particularly until you are confident about the amount of time likely to be taken.

6.4 The Calendar

During the course of the personal interview, the Cohort Member will be asked to recall the dates for events relating to housing, relationships, children and jobs, and ages for events relating to health. You will find that in each of these areas you are asked to record details of the current, or most recent event and subsequently **work backwards** to record details for earlier events in sequence.

The *NCDS Calendar* covers the years 1991 to 2004 (the start of the recall period depends on when they were last interviewed - 1999/2000 or 1991). You have a copy of this and the Cohort Member will find it printed on the back of the advance letter.

For Cohort Members, recalling events (backwards or forwards) may not always be straightforward. The calendar should help them and you. Many recent surveys have demonstrated that showing a calendar to Cohort Members can help them map out their time more quickly and accurately, before you actually enter the information into the CATI program.

You and/or the Cohort Member can use the calendar as you wish. You might want to encourage Cohort Members to note down key events or landmark dates such as

birthdays and marriages on the paper calendar to act as milestones. Indeed they can write on the calendar as much as they like. You may find the Cohort Member can remember recent events by working backward with the aid of the calendar, and more distant events by working forward with the calendar; or they may work backward or forward for everything.

The age of the Cohort Member is noted by the birth month (March) for each year on the Calendar. This may be a 'landmark date' which helps with recall of other dates/events. Other 'landmark dates' might be Christmas or Easter, and the Cohort Member may have other, personal 'landmark dates' (e.g. leaving the parental home, marriage, divorce, birth of a child, death of a relative/friend, leaving school, graduation, winning the national lottery, an accident/illness). Writing down any or all such dates might help trigger a more accurate recall of the date of another event.

There is no right or wrong way to use the calendar. It is there as an aid to be picked up and used by the Cohort Member as and when seems best, and to be put down when it doesn't help.

7 INTERVIEW – SECTION BY SECTION INFORMATION

This section covers the CATI questionnaire in detail. For each section of the questionnaire there is:

1. Information on the general terms and definitions used in each questionnaire module
2. A table containing question by question instructions and notes.

7.1 Introduction & Household Grid

The following terms and definitions are applicable throughout the questionnaire.

Marital Status: Throughout the questionnaire 'married' means that a **legal** marriage must have taken place.

- **'Cohabiting'** means living together as a couple, though not married. The Cohort Member and partner should be or have been sharing accommodation and living in all respects as a married couple. (Exclude situations in which one partner maintained separate accommodation in which they stayed regularly e.g. during the week, at weekends). This includes couples of the same sex.
- **'Separated'** always means legally separated (with the one exception at EXPARTL – see section 7.4).
- **'Legally separated'** means that a court hearing must have taken place. Permanent separations not involving a court hearing should be coded as 'married'. A temporary separation (for example, being in the armed services, in prison, on an education course) should be coded as married and normally living with spouse.

Partner: The word 'Partner' is used throughout the questionnaire to refer to someone with whom the Cohort Member is living, or has lived, with as married. This may include someone of the same sex as the Cohort Member. N.B. See entry under 'Marital Status' (above), for definition of 'Living as Married'.

7.1.1 Introduction and Household Grid Glossary

7.1.1.1 Normal address (Variable NORMAL)

If the Cohort Member is ...

- ... temporarily working away from home, their Normal Address is their permanent home address.
- ... in hospital or prison for **under 6 months**, their Normal Address is their home address.
- ... in hospital or prison for **6 months or more**, their Normal Address is hospital or prison.
- ... in the armed forces or the merchant navy, and stationed away from home for **under 6 months**, their Normal Address is their home address.
- ... in the armed forces or the merchant navy, and stationed away from home for **6 months or more**, their Normal Address is their current armed forces or merchant navy address.

If the Cohort Member has more than one address, take the address the Cohort Member considers to be their main address.

7.1.1.2 Type of address (Variable RESIDENC)

- **Private residence:** Include
 - armed forces married quarters
 - accommodation rented by National Health Service and Local Government workers
 - separate flats provided by the University for students
 - all other non hostel accommodation tied to employment or training;

Exclude hostel type accommodation eg. a room in a Nurses' Home, Students' Hall of residence or other place of work.

- **Sheltered housing:** Residents must have self-contained flats with their own kitchen and bathroom (regardless of any facilities such as a lounge). If the Cohort Member's accommodation is not self-contained then they live in an institution and this should be coded under one of the categories below.
- **Hotel / Boarding House / Residential hostel / Bed & Breakfast:** Hostels open to all regardless of need and occupation.
- **Hostel for homeless / Women's Refuge / Night shelter / YMCA / YWCA, etc.:** Any accommodation provided for single or married people with particular social or family problems (including homelessness). Placement is on a **temporary** basis.
- **Barracks / Room in Nurses' hall of residence / student hall of residence etc. (or other accommodation provided by employer):** Accommodation is of the hostel type but is tied to education, training or employment and is not open to all.
- **Room (only) at workplace:** e.g. if working in a hostel, in a Children's Home, special school or some other residential institution.
- **Hospital / Nursing home etc.:** Include all those who are in-patients in any form of hospital. See note at normal address rules (above) for details of length of stay for inclusion.

N.B. If no 'normal' address, take current address.

7.1.1.3 Household definition (Variable INTRO)

Members of the Cohort Member's household are those people who normally live with the Cohort Member at their normal address AND who 'share a living room with Cohort Member' AND/OR 'share a meal a day with Cohort Member'. (N.B. See entry under 'Normally living with Cohort Member' below.)

- Lodgers are people who rent a room in the accommodation but whose meals are not provided. Lodgers are single person households.
- Boarders are people who pay rent for a room in the accommodation and for whom meal(s) are provided. Boarders are included as members of the household, unless four or more boarders are living in the same household. In this case, treat each boarder as a single person household.

7.1.1.4 People who normally live with the Cohort Member (Variable INTRO)

- **Children (under 16)**

Include children aged 15 and under if they

- are attending boarding school but return home during school holidays;
- are away from home temporarily on holiday or in hospital (less than 6 months);
- live part of the time with the Cohort Member and part of the time with their other parent, if their **custody** or **residence** is split between the two parents.

Exclude children who are

- in the care of local authority, in residential home or with foster parents;
- in long-stay institutions for the handicapped or disabled;
- being brought up by friends, relatives or an ex-spouse or partner (except if custody is shared with the Cohort Member);
- away from home on holiday or in hospital for 6 months or more.

- **Adults (16 or over)**

Include adults away from home temporarily (less than 6 months continuously) for work reasons, on holiday, in hospital, in prison, in armed forces/Merchant Navy.

Exclude

- children aged 16 or older attending boarding school;
- students living away from home during term-time;
- adults away from home for 6 months continuously or more on holiday, in hospital, in prison, in armed forces/Merchant Navy.

7.1.2 Introduction and Household Grid Questions

Variable name	Instruction
Cmsex, Bdat1	<p>Checks on CM feed forward data. If a soft check is activated, check the serial number. If name and address correct, check date of birth and enter correction:</p> <ul style="list-style-type: none"> • If born in right week i.e. 3rd – 9th March, include detail in memo and continue with interview • If not born in right week, include detail in memo, thank respondent and end interview <p>DO NOT ATTEMPT TO INTERVIEW IN THE WRONG SLOT AS FEED</p>

Variable name	Instruction
	FORWARD AND OTHER DATA WILL BE WRONG
RESIDENC	<p>Cohort Member's current normal address - <i>see glossary</i>.</p> <p>Institutions usually have 'gatekeepers'. In most cases you will need to contact the gatekeeper before making direct contact with the Cohort Member. You may need to ask your supervisor to contact the gatekeeper on your behalf (see section 4.6).</p>
SECOND HOUSEHOLD GRID	<p>There are two household grids. The first will come up only if the Cohort Member was interviewed in the last survey (1999/2000). It includes details of everyone living with the Cohort Member at that time. You should confirm or update this information.</p> <p>Take care when you do this; if you make mistakes here (for example confirm marital status as unchanged when there has been a change), you will be unable to enter correct information later in the interview.</p> <p>The second household grid shows members of the household still living with the Cohort Member. Press 'End' to add details of new household members.</p> <p>The Cohort Member (CM) should always be the first person entered in the household grid.</p>
MS	<p>This question does not deal solely with legal marital status at this point but partnership status within the household. Therefore, cohabiting would supersede other statuses for this question, for example, if a Cohort Member is divorced but living with someone they would be coded as cohabiting for this question.</p> <p>If the Cohort Member's relationship has broken down, but their former partner is still living in the household (possibly because they cannot afford to move out), code the Cohort Member and the ex-partner as appropriate (but not as cohabiting). Make sure that elsewhere in the questionnaire you continue to code the relationship as having finished.</p> <p>MS must be the same in both household grids.</p>

Variable name	Instruction
RELTOKEY	<p>This question asks for the relationship of other household members to the Cohort Member. It is VERY IMPORTANT that you code this correctly, as it is used to route the Cohort Member through the rest of the questionnaire. In particular make sure that you code</p> <ul style="list-style-type: none"> • <i>Spouse</i> if the person is the husband or wife of the CM or • <i>Partner</i> if the person is the common-law husband or wife of the CM. <p>If the Cohort Member's relationship has broken down, but their former partner is still living in the household (possibly because they cannot afford to move out), code 97 (other) and make sure that elsewhere in the questionnaire you code the relationship as having finished.</p> <p>Ensure that you establish whether each child is the CM's</p> <ul style="list-style-type: none"> • <i>Own child</i> [code 3] – that is the CM's natural child. • <i>Adopted child</i> [code 4] – that is the CM has legally adopted this child. • <i>Child of current spouse/partner</i> [code 5] - that is the natural child of the CM's <i>spouse/partner</i>, from a previous marriage or relationship. This code would be used where the CM has not legally adopted this child (e.g. stepchild). <i>You should include children of the current spouse / partner who are 16 or older.</i> • <i>Child of previous spouse/partner</i> [code 6] - that is the natural child of a previous spouse or partner, who the CM no longer lives with. The child still lives with the CM but they have not legally adopted this child. <i>You should include children of a previous spouse / partner who are 16 or older.</i> • <i>Foster child</i> [code 7] – the child is being fostered by the CM. • <i>Child of an unrelated adult</i> [code 27] – A child of a current or a previous partner should <i>not</i> be coded in this category.

7.2 Housing

7.2.1 Housing Glossary

Equity share / Shared ownership: Shared or equity ownership means paying partly for a mortgage and partly rent for a property. The property is usually provided by a council or Housing Association (HA), and is owned jointly by the equity sharer and the council or Housing Association. Equity sharers take out a mortgage or loan in order to buy their share (usually 25%, 50%, or 75%) of the property. They continue to pay rent to the council or HA for the share of the property which the council or HA still owns. After a period of time, equity sharers have the option of buying a greater share of the property. If they buy 100%, the equity sharer becomes an owner-occupier in the normal way and no longer pays any rent.

7.2.2. Housing Questions

These will not be asked if the Cohort Member is living without other family members in institutional accommodation.

Variable Name	Instruction
Tenure	Shared Ownership / Equity share - <i>see glossary</i>
Housing history	We are interested in knowing where the Cohort Member has lived, going back to the date of the last interview if in 1999/2000, otherwise to 1991. You will not go into the housing history if the Cohort Member has been living at their current address for the whole period.
EVERMOVE etc.	<p>Please record the town and COUNTY where the CM was living, not just the town name. This is important as many place names are not unique, for example there is a Richmond in Surrey and in Yorkshire. If the Cohort Member has been working or living abroad, record the town and country, e.g. Melbourne Australia.</p> <p>Holidays lasting more than one month should not be counted as a change of address. For example if the CM goes on holiday for 6 weeks, this is a holiday and should not count as a move. Likewise if the CM is on business visiting a factory etc for 5-6 weeks, this is a business trip not a change of address.</p> <p>Please note the instructions for dealing with periods when the Cohort Member was abroad (outside the UK): If a Cohort Member spent periods abroad working and had made their home there for that period, please record each move as a separate address. For example: If the CM worked in Australia for 12 months and lived in Sydney for all of that time, this counts as one address (even if they moved from one part of Sydney to another in this period). However if they lived in Sydney for 6 months and then moved to Melbourne for 6 months these should be counted as two addresses. Likewise if they lived in Australia for 6 months in one town or city and then moved to New Zealand for 6 months, and lived in one town or city, these count as two separate addresses.</p> <p>If a Cohort Member was travelling, e.g. in a gap year between School and higher education, count the whole period of travel as one address. We are not interested in each of the places they visited. However if they travelled for 6 months, then worked in one place for 6 months, these should be counted as two separate addresses. The first is travelling, the second is the name of the town or city and country where they were living for 6 months.</p> <p>If the Cohort Member has been travelling record '<i>travelling</i>'.</p>

7.3 Relationships

7.3.1 Relationship Glossary

See general points about partner and marital status (section 7.1).

7.3.2 Relationship Questions

Variable Name	Instruction
CURPART & EXPART	Note that gay and lesbian couples should be included.
EXPART	If a Cohort Member lived with a partner for a while, split up but then got back together with the same person, this should be treated as two separate relationships.
EXPARTI	This is the only question where separated does not mean legal separation – in this case it refers to the emotional end of the relationship. You will have to be very tactful about asking this question in case the partner died. Code 3 indicates if the Cohort Member still considers the relationship to be active, even though the couple no longer live together.

7.4 Children (pregnancies / miscarriages / lone parenthood)

7.4.1 Children Glossary

- **Natural Children:** those to whom the Cohort Member has actually given birth (or fathered), i.e. does not include fostered or adopted children.
- **Adopted children:** must be legally adopted by the Cohort Member. If Cohort Member has a partner who has children of their own from a first marriage, these are step-children, unless the Cohort Member has legally adopted them.
- **Foster children:** may include children related to the Cohort Member (e.g. nephews, nieces etc) if fostered.

7.4.2 Children Questions

Variable Name	Instruction
EVERPREG	Does not feed forward from household grid, so remember to prompt for children added to the household grid.
PREGA	<ul style="list-style-type: none">▪ <i>Stillbirth</i> is a delivery of a dead child at or after the 24th week of pregnancy.▪ <i>Miscarriage</i> is the loss of a foetus or dead child earlier than the 24th week of pregnancy.
LONEPARA	Lone parenthood means bringing up a child on your own, without a resident spouse or partner.

Variable Name	Instruction
	<p><i>Note: a separation in this case includes any cases where the parents are no longer living together, not just legal separations.</i></p> <p><i>Include:</i></p> <ul style="list-style-type: none"> • periods living with others (e.g. parents, friends, etc) but without a spouse/partner; • periods when the spouse/partner is in prison or borstal, even if the relationship has not broken down; • cases in which the relationship has broken down and the couple are not living together, even if the spouse/partner shares in bringing up the children. <p><i>Exclude:</i> periods of living apart temporarily when the relationship has <i>not</i> broken down except in cases where the partner is in prison/borstal (see above).</p> <p>Do not include periods of lone parenthood that started before the date of last interview.</p>
LivHH	If the child has died since birth, code 'child no longer alive'. This is obviously a very sensitive situation and should be treated with tact. The CATI will route you to further appropriate questions.

7.5 Family Relationships and Support

7.5.1 Family relationships and Support Glossary

No entries

7.5.2 Family relationships and Support Questions

Variable Name	Instruction
MALIVE & PALIVE	These questions refer to the Cohort Member's natural (biological) or adoptive parents. If the Cohort Member has both adoptive and biological parents, then they should decide for which they are going to answer.

7.6 Family Income

7.6.1 Family Income Glossary

Whereas the rest of the interview focuses on the Cohort Member, in this section we are interested in collecting information about **family** income, by which we mean income received by **the Cohort Member and their spouse or partner**. Do not include income from independent children (children over the age of 16 in work) or other family or household members living with the CM as part of their household.

7.6.2 Family Income Questions

Variable Name	Instruction
IncS	This question refers to the Cohort Member and their partner / spouse. Read out the names of all possible sources of income payments and pause after each option.
IncAmt, EstInc	Accept estimates. Remember, if both Cohort Member and spouse/partner receive this separately, combine amounts .
Save SaveReg	These questions are for the Cohort Member and their partner / spouse.
FinNow	This question applies to the Cohort Member only, not to the Cohort Member and the partner / spouse

7.7 Employment

Please remember that the definitions used for this study may be very different from those you are used to using on other studies. Always check these instructions if you are unsure.

Where you have a long or complicated employment history (either because the Cohort Member has done many different things since the last interview or because they were not interviewed in 1999/2000), you should ask if they have a recent CV (curriculum vitae). If so, this will help you fill in their history quickly and accurately.

7.7.1 Employment Glossary

7.7.1.1 Main Activity

Many of the terms you need to refer to in the employment section are covered under **main activity**. This term is referred to at 'EconAct', 'Activity1-Activityn' and 'PeconAct' when we ask you to code the main activity of the Cohort Member and partner or spouse respectively.

Where there are competing claims for main activity and changes in jobs or main activity status please follow the guidance given in the following sections, to help you decide which activity or job takes priority:

(a) JOBS

The definition of a job may be different to that used in other surveys, but is standard for NCDS surveys. A Job is:

- a period of time working for one employer, including any changes in the actual work done - promotions
- a period working as self-employed, doing the same line of work throughout the period.
- a period of time employed by one or more agencies to work temporarily for other organisations (i.e. as an agency temp²), irrespective of how many of these organisations were worked for.

A JOB MUST LAST AT LEAST A MONTH TO BE COUNTED AS A JOB, UNLESS IT IS THE CURRENT JOB. For previous jobs, if the Cohort Member (or partner) has had a number of jobs in one month, for example as a casual labourer, record details of the type of work done.

Include:

- Part-time jobs (29 hours work or less) *when these are the individual's main activity.*
- Paid work done at home: baby minding, dressmaking, etc., *if main activity.*
- Unpaid work for a family business, *if main activity.* A family business is a business that is owned by an immediate family member.
- Work in Sheltered Workshops³.
- Jobs held abroad so long as they satisfy the other conditions of inclusion.
- Periods in Armed Forces.
- Time spent on paid or unpaid maternity leave, *if still employed and intending to return.* If the Cohort Member did not return to work after maternity leave, the job ended at the point when this was agreed between her and her employer.
- Time spent away from work for one of the following reasons, *if the Cohort Member has (or had) a job to return to:*
 - on holiday
 - on strike or temporarily laid off
 - sick leave of between one and six months' duration
- Time spent on any course of full or part-time education, *provided the individual was in paid employment throughout the period.*

Exclude:

- Jobs lasting under a month, *unless current job.*
- Second jobs done at the same time as a main job.
- Work-experience or sandwich jobs *whilst in full-time education.*

² An **agency temp** is someone who is directly employed by an agency, which in turn sends them to workplaces for short periods of time. This is different from a temporary job.

³ **Sheltered Employment:** Many disabled people work in factories or offices that have not been adapted in any way to their circumstances. Those that cannot work in unadapted premises because of the severity or nature of their condition, often find work in sheltered workshops where their special needs can be catered for. The workshops, which normally operate as a commercial concern, are run by Local Authorities, Voluntary Organisations or by Remploy Limited - a special company set up by the government. A Cohort Member working in sheltered employment will count as employed.

- Part-time or vacation jobs *whilst in full-time education*.
- Periods on government work or training schemes unless the job provides, or is expected to provide, income independently of the scheme allowance. Thus, a period of self-employment would count as a job even if the individual was on the Enterprise Allowance Scheme (EAS), because the person would expect to receive an income from their self-employment activities. On the other hand, a period on Employment Training (ET) where the sole income was the ET allowance would not count as a job. (Some individuals may want to describe periods on government schemes as jobs even though we are excluding them from our definition of a job. This is most likely to occur when Cohort Members who were not interviewed in 1999/2000 mention time on the Community Programme (CP), Youth Training Scheme (YTS), ET, Youth Training or Modern Apprenticeships.

Full-time jobs: A full-time job is 30 hours or more per week.

If the individual has two or more full-time jobs at any time (and no other main activity), take the full-time job with the most hours per week. If the individual works the same number of hours in both jobs, take whichever they consider to be their *main job*.

Part-time Jobs: A part-time job is less than 30 hours per week.

As long as the part-time job is regular, and done for at least a month, it does not matter how few hours were worked per week.

Temporary Jobs / Fixed Term Contracts: Temporary jobs must be defined from the start of employment as lasting for less than two years (for example cover for an employee's maternity leave). Someone working in a temporary job works for an employer directly (i.e. is not employed by an agency).

Self-employment: A period of self-employment includes continuous self-employment, freelancing or consultancy in the same line of work, irrespective of how many contracts were worked on.

Count as a single Job:

- A period of self-employment, free-lancing or consultancy in the same line of work, irrespective of how many contracts were worked on.
- A period of agency temping irrespective of how many individual placements this covered, or how many agencies worked for.
- A period with a single employer irrespective of how much the job changed EXCEPT in some circumstances for civil servants, teachers and NHS employees (see below).

Count as a change of Job:

- Any change of employer other than the take-over of a firm.
- Becoming self-employed, if currently an employee.
- Becoming an employee, if currently self-employed.
- Staying self-employed, but significantly changing nature of work.
- Changes of government departments for civil servants.
- Changes of school for teachers.
- Changes of hospital for NHS or NHS trust employees.

End of Job: The date of the end of a job is the date last worked, even if the individual continued to get pay such as severance, holiday or maternity pay.

(b) UNEMPLOYMENT

The individual's main activity status is unemployed only if they are not in a full-time job, full-time education, nor sick/disabled (temporarily or permanently).

Include:

- Anyone who was / is out of work but actively seeking work – e.g. registered at a government Employment Office, Jobcentre or Careers Office, or at a private Employment Agency (but not working), answering advertisements, advertising for jobs, etc.
- Anyone who is also retired or looking after home / family, provided they satisfy the conditions given in the 'Unemployment' entry above.
- Anyone who considers himself/herself as unemployed and wanting work, *even if the individual is doing part-time work, part-time education. etc.*

Exclude:

Anyone who is unemployed but does not want to work. Such individuals should not be treated as unemployed: try to fit their status to the list, but otherwise code as 'other'.

Start date of unemployment: This is the date when the individual stopped doing anything else and became ready and available to take up work if offered. This may be before they formally registered as being unemployed.

(c) OTHER

Full-time Education: If the individual is following a full-time educational course (at school, college, university, etc) this should be coded as the main activity, even if they are also doing part-time or holiday jobs.

Exclude:

students in paid occupation where training also given (eg: apprentices, student nurses) or on day release or sandwich courses: code these as employees.

On a government scheme for employment training: Include trainees on government schemes who do not earn money independently of the scheme allowance.

Temporarily Sick or Disabled: Code this as the main activity if the individual has been off work for between one and six months, and has a job to go back to.

Permanently Sick or Disabled: Code this as the main activity if the individual has been (or is likely to be) off work for more than 6 months and he / she:

- has no job to go back to
- is prevented by his / her health or disability from looking for work
- is below retirement age (under 60 if female, under 65 if male)⁴

⁴ All Cohort Members and most of their partners.

Someone classified as permanently sick or disabled is likely to be claiming some kind of state or insurance benefits.

Looking After Home / Family: This is coded only if this is the person's exclusive activity, or if they are also doing a part-time job, but consider domestic duties to be their main activity. More than one person in a household can be looking after the home and family. This code applies if this is a person's normal status, even if they are currently sick, on holiday, etc. This code includes housewives and women below retirement age who have left work to look after home/family. Those who are not employed/self-employed but their main activity is caring for a family member/other person should be coded as 'looking after home/family'.

Wholly Retired: This is coded if a person is not in work, not seeking work and has reached retirement age for their job. Given the Cohort Members' age, this is unlikely to apply, except in the case of a very few partners.

N.B. If an individual is wholly retired, this should be coded in preference to sick or disabled or looking after home and family, even if these also apply.

Other: Code this for anyone for whom the other codes are inappropriate. This may include people who are unemployed but not actively seeking work or living off trust funds.

7.7.1.2 Occupation Information

You will be asked to obtain full information about the Cohort Member's job and, where appropriate, their spouse or partner's job. This information will be used to classify these jobs into very precise categories. We need as much detail as possible in order to classify all these jobs correctly.

Listed below are things to look out for in the various sections of the 'Job' questions:

(a) Name / title of job

It is very important that you obtain as much information as possible here as it is used to code SOC and SIC. Include rank or grade (for civil service, local government, police etc.). Try to record specific job titles, and avoid vague, generic descriptions such as:

- 'clerk' – could be filing clerk, bank clerk, etc.
- 'teacher' – enter whether primary or secondary, and any additional information such as a special needs teacher.
- 'civil servant' – could be anything from a messenger to a Head of Department.
- 'engineer' – covers many different types of skill and levels of responsibility. We need to know the kind of engineer - electrical, civil, heating etc.

(b) Kind of work done

This question gives us additional material which is especially helpful where the job title alone is not sufficient to code the CM's occupation. Probe for full description of job responsibilities, necessary qualifications, and special machinery or equipment used. Machinery or special materials must be of a specialised nature, not just everyday office equipment, for example:

- *include* telephone switchboards, printing machinery, office computer networks, data bases and other computer skills;

- *exclude* telephones, ordinary office photocopiers.

If in doubt, record qualifications which would be needed by somebody starting the job now, even if the Cohort Member does not have those qualifications.

(c) Employee v. Self-employed

If in doubt about whether someone is self-employed, obtain information on their tax and National Insurance status. People not on PAYE / Schedule E who pay their own National Insurance stamps, should be counted as self-employed, even if they work for a company as, for example, a self-employed taxi driver. Temps working for an agency are employees.

(d) What is Made or Done by the Employer

This can be different from the Cohort Member's work. If the Cohort Member is a cook in a car factory canteen, code 'car manufacture', not 'catering'.

Make sure you obtain sufficient detail: what product(s) is/are made or what services provided, not just, for example: 'office work', 'building', 'local government'.

(e) Type of organisation

- **A private firm or company** means an organisation in private ownership, either incorporated under the Company's Act (eg: XYZ Ltd or ABC Plc), or otherwise privately owned, such as a solicitors' partnership or a family business, such as a farm or shop. Include private companies supplying services to public organisations, such as cleaning and catering for local councils or NHS hospitals. Private / public schools that do not have charitable status and private hospitals should be included (but not NHS Trusts).

Companies Limited by guarantee should be coded as 'Companies' and not Charities/Trusts.

- **Public corporations or nationalised industries**, now privatised, include the Gas Board, Electricity Board, British Steel, British Rail. Other examples of public corporations or nationalised industries include the BBC, the Royal Mail and Network Rail.

N.B. Since 1986, the status of some organisations may have changed, particularly those originally in public ownership. In the questions dealing with job histories we are interested in the status of the organisation at the time the Cohort Member was employed. If the status of a company changed over their period of employment, enter the status of the company when they left (or if current job the current status).

(f) Place of work

This means the establishment the Cohort Member works or worked in - either a building, or a site at the same address. A department is not an establishment unless it is a separate branch that has an address of its own, for example a bank or Post Office branch, a shop, a school, an area office, etc.

If a Cohort Member does not have a fixed place of work, you should enter their main contact office or head office.

Many people who work "from home" have a base office or depot that they communicate with. It may even be true of some people who work "at home" (e.g. telecommuter who retains a desk or some minimal presence in an office). If in doubt,

accept the respondent's view of whether or not there is a wider establishment outside the home that they belong to for work purposes.

(g) Qualifications / training normally required to do the job

This means entry qualifications normally required of anybody taking up the Cohort Member's job. The qualifications listed in a job advertisement are a good indication. If the qualifications required have changed you should enter the details of what was required when the Cohort Member started at that company or organisation. The Cohort Member may have skills, training, and qualifications that are not relevant to the job; these should not be listed. The Cohort Member may not have the skills etc. normally required. In this case the normal requirements required when starting the job should still be listed.

(h) Supervisory / management responsibilities

This means responsibility for decisions that determine the work of other employees in some way or other.

(i) Definition of Promotion

Promotion may be automatic; for the purpose of this study it must involve a change of pay and status (and will usually involve a change in job title, e.g. from Researcher to Senior Researcher). A change of pay alone, for example an annual pay review, does not count (e.g. annual rise); neither does a change of status, for example completing a probationary period, unless linked to a change in pay.

(j) Working Hours: Exclude meal breaks and overtime (paid or unpaid).

Hours worked:

- **If the work pattern is not based on a week**, get an average over the last four weeks.
- **If the Cohort Member has been off sick for a long period**, take the usual hours worked before going sick.
- **If a Cohort Member has recently started a new job**, record the hours the Cohort Member expects to be working in the future.
- **Apprentices, trainees and other people in vocational training:** exclude any time spent in college or other special training centres outside their workplace.
- **Cohort Members working on-call:** If someone states at the hours questions that they usually work 24 hours a day because they are 'on-call', the average number of hours **actually** worked should be probed for. Identify how many hours were actually worked in the last four weeks and average these out to give a weekly total for usual hours. For example, if a Cohort Member was on-call all night, but was only called out to work for two hours, the actual working hours for this night would be two hours.
- **Self-employed people** often find it difficult to give precise figures. If necessary, encourage them to work things through on a daily basis and get as accurate a figure as possible. It is important that we have information about their hours worked to compare these with the hours worked by employees.

7.7.2 Employment Questions

Variable Name	Instruction
CStartYr, CStartMo	If necessary, use the NCDS calendar or Cohort Member's CV.
CJTitle, CJDo, CJFirm	The more information you gather the better. See Glossary entry on <i>Occupational Information</i> .
CNetPay, CGroPay	It may be helpful to refer to the Cohort Member's last pay slip, but accept estimates if necessary.
CHours1	See glossary entries on working hours.
J21	Pension provision may be accumulated from several jobs, so treat this as a multicode.
CJSEHrs	If necessary, encourage Cohort Member to calculate on a daily basis and get as accurate a figure as possible.
SEType	<p>The distinction here is between people who work in a conventionally self-employed manner (i.e. have some control over when and where they work, etc.), and people whose conditions of work are just like those of an employee (i.e. have to work set hours at a set place, etc.) and for whom self-employment is an administrative convenience.</p> <p>If Cohort Member owns business jointly with others, obtain Cohort Member's estimate of their own share.</p>
UnempY	See Glossary entry on <i>Unemployment</i> and unemployment section under main activity
Activity history	<p>We are interested in collecting information on the activity status of Cohort Members going back to the date of the last interview (to 1999/2000, or to 1991).</p> <p>If the Cohort Member's current activity started after the date of the last interview, you will be routed into the activity history section.</p> <p>Use the calendar to map out the activities the Cohort Member has been doing over this time. If the Cohort Member was doing more than one activity or job at the same time, you should ask them about their main activity or job. Refer to <i>Main Activity</i>, in the glossary above.</p> <p>The activity history will not allow gaps. Thus you must account for every month. It will be easier to do this if you use the calendar first, and then confirm the details with the Cohort Member as you enter the information into the questionnaire.</p> <p>For example: Cohort Member Jane Smith was last interviewed in November 1999. She started her present job, working part-time as a market researcher in October 2003. Before that she worked as a part-time researcher in a different company (hence a different activity) from May 2002 to September 2003. Before that she worked as a full-time researcher in the same company (hence a different activity) from May 1996 to May 2002.</p>

Variable Name	Instruction
	This included a period of maternity leave, from October 1998 to July 1999, but she returned to work, so this does not count as a different activity. This was what she was doing when last interviewed, so the job history will finish there.
Activity	See Glossary entries under <i>Main Activity on Jobs</i> .
StartYr, StartMo	Use NCDS Calendar or Cohort Member's CV as necessary to establish dates
JTitle, JDo	The more information you gather the better. See Glossary entry on <i>Occupational Information</i> .

7.8 Cohort Member's partner / spouse

For Cohort Members who are married or cohabiting we ask a couple of questions about their partner or spouse's current activity, and the age at which their partner or spouse left full time education. Do not expect the Cohort Member to know the answers in detail.

7.8.1 Cohort Member's partner / spouse Glossary

No entries

7.8.2 Cohort Member's partner / spouse Questions

Variable Name	Instruction
PLeftEd	Note this question asks when the Cohort Member's partner or spouse <u>finally</u> left full time education. Thus if they left school at 16, worked for a while and then went back to college, it is the age they <u>finally</u> left full time education that should be recorded here. If their partner or spouse is still in full-time education, enter their present age at this question.

7.9 Lifelong Learning

7.9.1 Lifelong Learning Glossary

7.9.1.1 Course Of Education Or Training

What counts as ONE course:

- A course can be for part of a qualification where this qualification is taken in stages interrupted by some other activity. The part must have an official name (e.g. RSA Stage 1).
- If any one qualification is obtained through a series of sub-courses or modules taken consecutively, this should be treated as a single course, i.e. there is no officially named part of the qualification that is obtained through one of the sub-courses. (See above.)

- A course can be for more than one qualification where these are taken simultaneously, e.g. 'O' levels and 'A' levels taken together.
- If one course for a qualification is taken after another (e.g. 'O' levels, then 'A' levels, or a course for a basic qualification, followed by a course for a separate advanced qualification), treat the course for each qualification as a separate course.
- If a course involves work placement or a sandwich job, treat this period of work as part of the course. A complete sandwich course, involving several periods on a course and several periods of work, counts as one course.
- Vacation breaks during a course are part of the course.
- Periods of placement abroad whilst on a language or other course (if a course requirement) are part of the course.
- Periods of sickness or maternity leave which did not interrupt the course (i.e. did not involve delaying the completion date) are part of the course.
- A period of tuition not intended to lead to a qualification is counted as a course if it is presented as a unitary entity - e.g. given a single name, called a 'course', etc.

Education course - full-time v. part-time

In the first instance, courses should be coded as they are defined by the institution offering the course. If the Cohort Member is in any doubt as to whether a course is full or part-time, treat a course as full-time if it is for 21 hours per week or more, and as part-time if it is for less than 21 hours per week. (These hours should include expected private study as well as teaching hours.)

7.9.1.2 Work Related Training

Work related training is defined in the questionnaire as training designed to help develop skills that might be used in a job.

What counts as one training course?

A training course must last for the equivalent of 3 days to be included. A series of training courses that form part of a single training programme or qualification should be treated as a single training course (i.e. if the whole course must be taken before recognition for completing the course would be given.)

Work related training can cover:

- **Training provided by an employer and related to a particular job the Cohort Member is doing.** This may be:
 - on-the-job training i.e. teaching the Cohort Member whilst actually doing the job;
 - off-the-job training in the firm's premises: either in a training centre or at the Cohort Member's ordinary place of work, but not as part of actually doing the job;
 - off-the-job training outside the firm's premises: e.g. a block release or day release course at a college.
- **Training provided by an employer, not specifically related to the particular job the Cohort Member is doing.** This may be an induction course, introducing the

Cohort Member to the work of other departments, or giving the Cohort Member more information about the firm as a whole, if the Cohort Member sees this as training.

- **Any training course not provided by a person's employer that is designed to develop skills that might be used in a job** - either the Cohort Member's current job, or some job in the future.

7.9.2 Lifelong learning questions

Variable Name	Instruction
Whatqual	A list of qualifications is shown on your show card. You should familiarise yourselves with all these qualifications before you start interviewing. Cohort Members will only be asked about qualifications gained since the last interview. Therefore, if they were not interviewed in 1999/2000 they will be asked for a complete history since 1991. In the case of highly qualified individuals this may take some time. If necessary, use the calendar and/or a CV to establish dates with as much accuracy as possible. Evidence suggests that very few cohort members will have gained any qualifications.
Degree, HighDeg	Please make sure you note the title (BA, BSc, MA, MSc, MPhil, PhD etc.)
EDQWHEN	Avoid the 'don't know' response if possible. A confident guess is preferred.
EDFTPTIM	See Glossary entry on fulltime and part time education
CityLev	If the Cohort Member has obtained more than one level, record all the levels

7.10 Health

7.10.1 Health Glossary

If the Cohort Member was not interviewed in 1999/2000, the reference period for questions will be 'Since January 2000...': we don't think it is reasonable to attempt to collect health data from before then. For other questions, the reference period for health questions will be 'in the last 12 months'.

7.10.2 Health Questions

Variable Name	Instruction
LSICond	Probe for as much detail as you can. Try to get the official medical names and details of symptoms and effects. Record each condition separately.
LSIAge	If necessary, use the Calendar to help establish age (See above)
Kh1prb1	We are concerned here to identify any important health conditions that have not already been reported at the previous question (LSIAny). To avoid reports of minor complaints (e.g.: colds, flu, etc) the question focuses on conditions requiring regular (at least annual) medical supervision. Some

Variable Name	Instruction
	<p>Cohort Members may have only recently been diagnosed with a condition that will require such regular medical supervision. Include these if not already reported. If in doubt about any non-trivial or temporary condition, include it here if not already reported (Temporary conditions are defined as lasting less than one month).</p> <p>Record all conditions here – unlike LSICond there are no follow-ups.</p> <p>Remember, probe for as much detail as you can get about any such health problem. Try to get the official medical names and details of symptoms and effects.</p>
'Other' answers	Whenever you are directed to record details of 'other' health conditions, probe for as much detail as you can. Try to get the official medical names and details of symptoms and effects.
KNXDTS	NB: we want number of <u>incidents</u> , not admissions/outpatient attendances.
Khosp, Khospd	<p>Include <u>complications</u> with childbirth (e.g. emergency caesarean), whether the complication was the reason for admission or developed after admission.</p> <p>Includes admissions as a day patient – not outpatient – for example for minor surgery.</p>
Units1, Units2	Note the definition for beer: a small can (or bottle) or half a pint is equivalent to 1 unit; a large can (or bottle) or a pint is equivalent to 2 units.
Exercis1	<p>If Cohort Member walks as a means of transport, include as a relevant form of exercise if they walk briskly for 30 minutes or longer.</p> <p>N.B. Exercise does <i>not</i> include manual labour (e.g. bricklayer),</p>

7.11 Admin Block

7.11.1 Stable address

Even if you do not complete a full interview, make sure you ask the Cohort Member if they are willing to provide a stable address. Record this in the Admin block. Remind the Cohort Member to inform the person concerned that you have been given their contact details. If a Cohort Member says that we already have this information, tell them that we want to check that the information we have is up to date.

7.11.2 Outcomes

CATI will calculate productive outcomes automatically. If the outcome code shown is incorrect, check that you have completed all relevant parts of the interview. If you still think there is a problem, contact your supervisor.