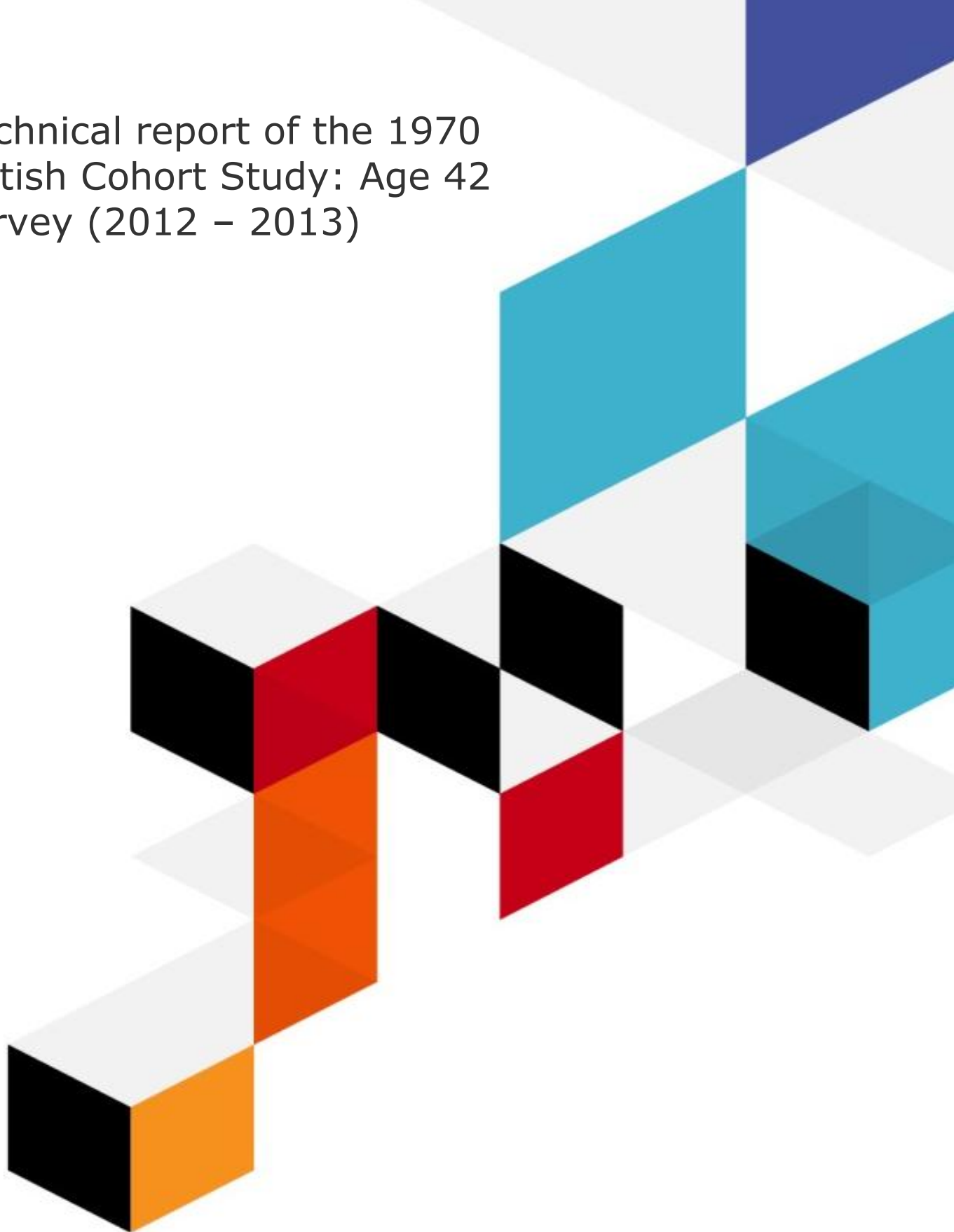


Technical report of the 1970  
British Cohort Study: Age 42  
survey (2012 – 2013)



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# Acknowledgements

We would like to thank all of the cohort members who generously gave their time to participate in this project and without whom this survey would not have been possible.

At TNS BMRB, we would like to thank all of our colleagues, who have been involved in the setting up and implementation of this project.

We also wish to express our thanks to the interviewers who worked on this survey, and on whom so much of the success of the fieldwork depended.

# 1. Introduction

## 1.1. The 1970 British Cohort Study

The 1970 British Cohort Study (BCS70) is one of Britain's world famous national longitudinal birth cohort studies, three of which are run by the Centre for Longitudinal Studies at the Institute of Education, University of London.

Britain has a unique tradition of carrying out national birth cohort studies, following the same group of people from birth into and through adulthood, and providing a picture of whole generations. There are four such surveys, of which the BCS70 is the third:

- 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)

Each follows a large number of individuals born at a particular time through the course of their lives, charting the effects of events and circumstances in early life on outcomes and achievements later on. The questions on health, education, family, employment and so on are put together by academic researchers and policy makers to understand and improve life in Britain today and in the future.

## 1.2. Background to the study

BCS70 began when data were collected about the births and families of 17,287 babies born in the UK during one week in April 1970. Since then, there have been seven surveys gathering information from respondents living in England, Scotland and Wales<sup>1</sup>. With each successive attempt, the scope of enquiry has broadened from a strictly medical focus at birth, to encompass physical and educational development at age five (1975), physical, educational and social development at ages ten (1980) and sixteen (1986), and then to include economic development and other wider factors at age 26 (1996), 30 (1999/2000), 34 (2004/2005) and 38 (2008/2009). At age 34 (2004/2005), cohort members' basic skills (literacy and numeracy) were also assessed. In addition, there have been studies of sub-samples of the cohort, for example, in 1991/1992 a 10% representative sub-sample was assessed for difficulties with basic skills. Most recently, in 2004, for a one-in-two sample of BCS70 cohort members, information was gathered from and about all natural and adopted children living with them.

Data for BCS70 have so far been collected from a number of different sources (the midwife present at birth, parents of the cohort members, head and class teachers, school health service personnel and the cohort members themselves). Data have also been collected in a variety of ways (paper and electronic questionnaires, clinical records, medical examinations, physical measurements, tests of ability, educational assessments and diaries). The survey was

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<sup>1</sup> Including the Channel Islands, Isle of Man and other offshore islands.

conducted by telephone for the first time in 2008/2009 (age 38). The latest sweep used face to face interviewing (CAPI)<sup>2</sup>.

The Centre for Longitudinal Studies (CLS) at the Institute of Education, University of London (and formerly the Social Statistics Research Unit at City University), has been responsible for the study since 1991. The study is funded by the ESRC (the Economic and Social Research Council). TNS BMRB in collaboration with CLS were responsible for the development, fieldwork and initial data preparation for the 2012/2013 survey.

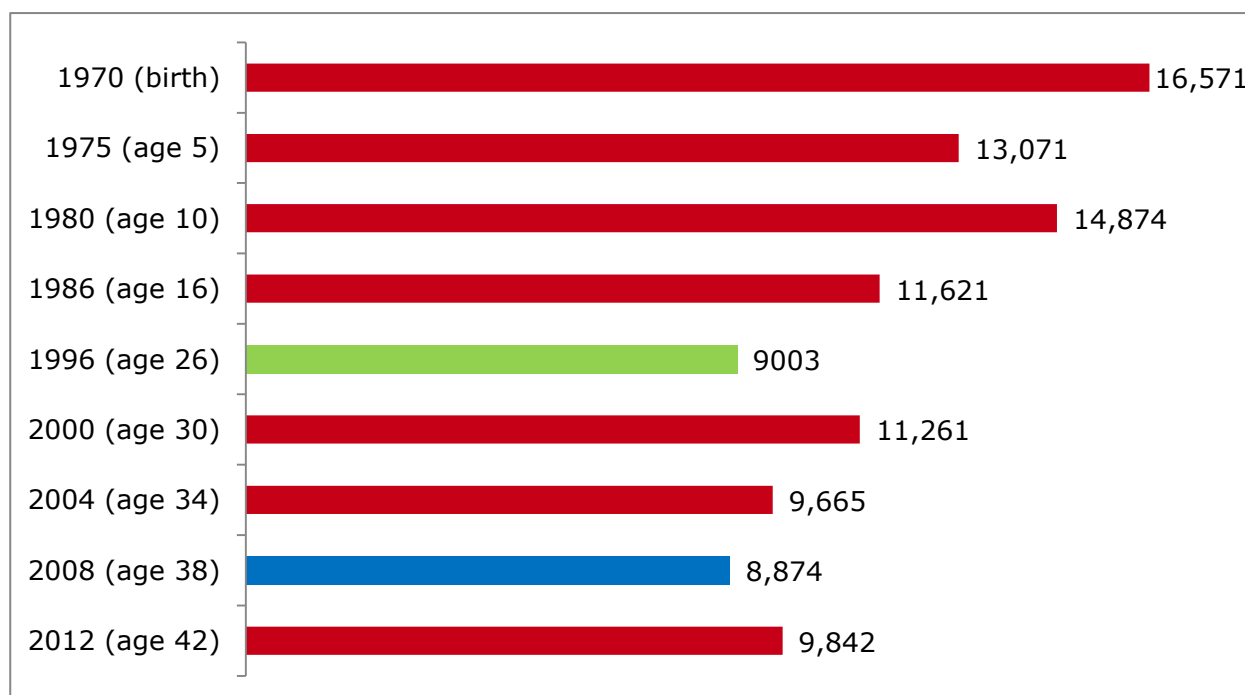
### 1.3. Current sweep

Following competitive tender, the Centre for Longitudinal Studies, commissioned TNS BMRB to carry out the instrument development, data collection and initial data preparation for the 2012/2013 sweep of the BCS70.

This report provides an account of the design, development and conduct of the eighth follow-up survey which took place in 2012/2013.

### 1.4. Participation by sweep

The chart below shows the number of interviews achieved at each sweep of BCS70. All sweeps were conducted face to face with the exception of the age 26 sweep (postal) and the age 38 sweep (telephone).



The total number of interviews for the age 42 sweep includes those achieved at the dress rehearsal and during the main stage of fieldwork as data for these was merged so the dress rehearsal data is included in final data.

As the chart shows, more interviews were achieved at the age 42 sweep than at either of the two previous sweeps.

<sup>2</sup> CAPI stands for Computer Assisted Personal Interview.

## 2. Sample design

### 2.1. Introduction

The BCS70 selected all babies born in the UK during one week in April 1970. In later sweeps, the cohort was augmented by additional children who were born outside Great Britain, but within the target week in 1970, and subsequently moved to and were educated within Britain. Individuals from Northern Ireland, who had been included in the birth survey, were dropped from the study in subsequent sweeps.

### 2.2. Issued sample for the Age 42 survey

The issued sample for the Age 42 survey consisted of 13,189 cohort members. The sample was made up of two groups:

#### **Originally issued cases (n=11,654)**

These were cases that fulfilled the criteria for being included in the Age 42 survey when fieldwork started in May 2012 (see below). These included 21 cases that had been included in the dress rehearsal sample but where an interview was not achieved at the dress rehearsal. These also included 4 cases that were not originally issued to TNS BMRB but were added to the sample early in fieldwork and 13 additional cases who were not issued at the start of fieldwork as they had lost contact with the study, but the cohort members re-established contact with CLS during the course of fieldwork. These were issued in November 2012.

#### **Cases traced via the NHS during fieldwork (n=1,535)**

During fieldwork, CLS provided details of an additional 1,535 cases who were traced via the NHS Information Centre. These were all cases that had lost touch with the study some time ago. 1381 were traced using automated matching and issued in December 2012 and January 2013. A further 154 cases were traced using manual matching and issued in March 2013.

The criteria for being included in the Age 42 survey when fieldwork started were:

- Participated in either the 2004 or 2008 follow-ups, and had not subsequently withdrawn from the study, died or emigrated.
- Did not participate in either the 2004 or 2008 follow-ups, but had confirmed their address with CLS in some other way since 2004, and had not subsequently withdrawn from the study, died or emigrated.

Most (74%) of the original issue sample had been interviewed at the previous wave of the survey in 2008 (age 38) but some had not taken part in a long time, or at all. Amongst the sample traced through NHS records, none had been interviewed more recently than 2000.

Table 2.1 below shows the sweep of last interview for all issued sample, split by original issue cases and those traced through NHS records.

**Table 2.1: Sweep of last interview**

	Original issue		NHS traced cases	
	n	%	n	%
Never participated	9	<1	2	<1
1970	23	<1	81	5
1975	21	<1	75	5
1980	207	2	461	30
1986	344	3	412	27
1996	232	2	149	10
2000	621	5	355	23
2004	1,526	13	0	
2008	8,671	74	0	
TOTAL	11,654		1,535	

### 2.3. Sample structure

Before the start of fieldwork, CLS provided TNS BMRB with a 'live' sample file that included 11,616 cohort members. To this, TNS BMRB added 21 cohort members that had been included in the dress rehearsal sample but with whom an interview was not achieved at the dress rehearsal. This sample was examined to identify 'likely movers' and 'likely refusals'.

A cohort member was considered a likely mover if:

- they had a status of 'gone away' on CLS's database (meaning that CLS had established that the cohort member no longer lived at the issued address); or
- they had a status of 'confirmed' but were non contacts or not issued at sweep 8 (in 2008) and had not confirmed their contact details with CLS since 2008.

A cohort member was considered a likely refusal if:

- they refused at the 2008 survey; or
- they refused at the 2004 survey and had not taken part since; or
- they refused at the 2000 survey and had not taken part since.

Using this classification, 1,584 cohort members were designated as likely movers and 1,009 likely refusals. However, there was some overlap between these groups. Where a cohort member was both a likely refusal and a likely mover, they were treated as a likely refusal when it came to allocating sample to waves.

For the likely refusals a small experiment was undertaken. Some of these (around a third) were allocated to interviewers that had been identified as 'high performers' (based on response rates they had achieved on other projects) and the rest were allocated to other interviewers. This was undertaken to examine whether the high performing interviewers could achieve higher response rates amongst cohort members who were less likely to be willing to take part in the survey.

## **2.4. Serial numbers**

Each BCS70 cohort member has a unique serial number that was allocated at the beginning of the study. In order to facilitate fieldwork management and data processing, and to increase confidentiality, each cohort member was allocated a unique TNS BMRB serial number, specific to this sweep of fieldwork. The TNS BMRB serial number was used on all letters (advance letters, tracing letters, thank you letters) as well as paper self-completion questionnaires, consent forms, and other documents.

## **2.5. Allocating the sample to waves**

### **2.5.1. Original sample**

To help manage fieldwork the original sample was allocated to three waves. The first wave started at the end of April 2012, the second wave started in July 2012 and the third wave started in October 2012.

Cases that had been identified as likely movers were allocated to wave 1 to allow maximum time for tracing these cases if they had indeed moved. Cohort members that had been designated as likely refusals were allocated to wave 2 based on the idea that interviewers may have a better chance of persuading these cohort members to take part if they had already completed a wave 1 assignment and so were more knowledgeable about the study and might be better at answering questions.

The remaining sample was allocated to waves based on the most efficient geographical clustering. Waves 1 and 2 included more cohort members than wave 3 so as to try to complete the majority of fieldwork well before the planned end date: waves 1 and 2 each made up 39% of the sample, and wave 3 made up the remaining 22% of the sample.

When additional cases were received from CLS during fieldwork, these were issued to whichever assignment they best fit into geographically, and so were allocated to whichever wave that assignment was in.

### **2.5.2. Cases traced through the NHS**

The 1,381 cases traced by the NHS Information Centre using automated matching were provided to TNS BMRB in November 2012. Where practical, these were added into an existing assignment in waves 1, 2 or 3. However, at this point in fieldwork there were a limited number of existing assignments still being worked by interviewers, so the majority of these cases were allocated to new assignments and created a new wave 4.

The 154 cases traced by the NHS Information Centre using manual matching were provided to TNS BMRB in February 2013. These were all allocated to wave 4.

### 2.5.3. Number of cohort members in each wave

Table 2.2 below shows how many cohort members were allocated to each fieldwork wave for original issue cases and NHS cases.

Where a cohort member was discovered to have moved during fieldwork, if their new address was in a different area, they were reallocated to a different assignment (and a different interviewer). In some cases the new assignment would be in a different wave of fieldwork and so the cohort member changed waves during the course of fieldwork. The table shows the final wave allocation, although this is only different from the original wave allocation in a minority of cases.

**Table 2.2: Number of cases in each wave**

	Original issue	NHS traced cases
Wave 1	4,558	65
Wave 2	4,491	163
Wave 3	2,596	219
Wave 4	9	1,088
Total	11,654	1,535

### 2.6. The sample files

CLS was responsible for providing sample information for cohort members who are part of the 1970 British Cohort Study to TNS BMRB and for ensuring that this information was as accurate and up-to-date as possible.

The sample information that was provided to TNS BMRB was split into two types: fixed sample, and live sample. The fixed sample files contained details of all sample members, and contained information that was not subject to change, such as:

- Serial number
- Survey outcome from previous sweeps
- Date of last interview
- Address at last interview
- Reasons for refusal from previous sweep
- Whether previous sweeps had been conducted as a proxy interview.

The live sample file contained information that could change and needed to be as up-to-date as possible. A live sample file was produced for original issue cases before the start of fieldwork, and additional live sample files were produced and sent to TNS BMRB when additional cases (such as those traced through the NHS Information Centre) were issued to TNS BMRB. Live sample files included the following information:

- Serial numbers
- Survey status
- Cohort member details (name, gender, date of birth)
- Contact details for the cohort member – an address, up to four telephone numbers, and an email address
- The name and mobile telephone number of the cohort member's partner
- The name, address, telephone numbers and email addresses of up to two stable contacts (family members or friends who could be used to trace cohort members if required).

### **2.6.1. Delivery of sample files to TNS BMRB**

The fixed sample file was delivered to TNS BMRB ten weeks before the start of fieldwork and contained all 18,170 cases ever included in the study. The live sample file for the 11,616 cases ready to be included in the age 42 survey at the start of fieldwork was delivered to TNS BMRB at the same time.

Once the sample was delivered to TNS BMRB, it was loaded on TNS BMRB's electronic sample management system. This was then used to group the sample into assignments and send these electronically to interviewers. It was also used to produce the paper documents containing sample information.

### **2.6.2. Other sample information**

In addition to the fixed and live sample files, "feed-forward" data files were also delivered to TNS BMRB before the start of fieldwork. These contained the answers cohort members had given to key questions in previous interviews. Like the fixed sample file, these files contained all 18,170 cases ever included in the study.

The feed forward data was provided in two files. One file which included information about the cohort member only, and one hierarchical file with details of all individuals that had lived with each cohort member about whom information had been collected at previous sweeps of the study.

The answers contained in the file were loaded or "fed-forward" into the current CAPI questionnaire. For example, the cohort member's partner's name and other details were fed forward and the respondent was asked if this was still their partner.

As well as information from previous interviews being added to question text, it was also used in question routing. For example, a question such as, "Is your mother still alive" would be routed past if the cohort member had said at a previous interview that their mother had died.

## **2.7. Sample updates**

CLS continued to trace cohort members until the start of fieldwork in May 2012. After this CLS would still receive updated contact details from some cohort members during the course of fieldwork even though they were not actively tracing them. CLS started sending sample

updates through to TNS BMRB five weeks before the start of fieldwork and these were then sent on a weekly basis until two weeks before the end of fieldwork.

Sample updates could include:

- Status changes (eligibility status, participation status, status if address)
- Changes to contact information
- Other useful information for interviewers.

Section 5.9 gives details of how sample updates were handled by TNS BMRB.

## **2.8. Return of sample to CLS at the end of fieldwork**

TNS BMRB was responsible for updating contact information for cohort members that were interviewed at this sweep of fieldwork and transferring this updated information to CLS monthly during the course of fieldwork (with a final file one month after fieldwork had finished). Updated contact information was also supplied, where possible, for cases who were not interviewed at this sweep – this was provided one month after fieldwork had finished.

### 3. Overview of the elements of the study

The 2012 sweep of the 1970 British Cohort Study comprised of a 60 minute face to face (CAPI) interview which included a vocabulary task, a self-completion section, and collection of consents to data linkage, as well as a 16 page paper self-completion questionnaire.

#### 3.1. The BCS70 interview

The CAPI interview included the following sections:

- Grids, which consisted of:
  - Partnership history
  - Children (both those living with the cohort member and those not living with the cohort member)
  - Other household members
- Family, which consisted of:
  - Non cohabiting relationships
  - Absent and older children
  - Parents
  - Family and social relationships and support
- Housing, which consisted of:
  - Housing history
  - Details of current home
  - Rent/mortgage payments
- Employment and income, which consisted of:
  - Activity history
  - Details of current job including pay and hours
  - Unemployment
  - Partner's activity/employment
  - Benefits and other sources of income
- Vocabulary task
- Lifelong learning, which consisted of:
  - Details of any qualifications obtained since last interviewed
  - University and school information
- Health, which consisted of:

- General state of health
- Details of any health issues in last four years
- Smoking and drinking
- Height and weight
- Self-completion (CASI), which consisted of:
  - Class and sexual identity
  - Children who have died
  - Menstruation and gynaecological issues
  - Whether want (more) children and reasons for not having children
  - Fertility treatments
  - Unsuccessful pregnancies
  - Household chores
  - Mental health
  - Job satisfaction and satisfaction with life
- Collecting consents for data linkage
- Collecting paper self-completion questionnaire
- Updating contact information

The paper self-completion questionnaire included questions on:

- Leisure and sporting activities
- Feelings, opinions and attitudes
- Politics and voting
- Watching television
- Reading books and newspapers
- Religion
- Food and cooking
- Emotional well being

This chapter contains a brief description of each element of the study. Details of the development work for the study are contained in chapter 4.

### **3.2. Who could be interviewed**

In most cases only the cohort member themselves could be interviewed.

However, if the cohort member could not understand the questions (even through an interpreter) or communicate the answers for themselves, the interviewer attempted to conduct a proxy interview with a carer or family member. The proxy interview was approximately 20 minutes long. Questions were asked about the cohort member's relationship history, children and household composition, where they currently live and their current activity status. There

were also questions about the cohort member's educational attainment and their health. No other elements of the study were administered.

### **3.3. The CAPI interview**

The main stage CAPI survey took approximately 60 minutes to complete and aimed to update information on the cohort member's circumstances and key events in their lives. The time period which the questions referred to depended on when the cohort member was last interviewed. This is discussed in greater detail below. The majority of questions in the interview were asked in earlier sweeps of BCS70 and in NCDS which allows comparisons to be made across the BCS70 sweeps and with the NCDS cohort.

#### **3.3.1. Event histories**

There were three event histories included in the CAPI interview: a relationship history, a housing history, and an economic activity history. Cohort members that had been interviewed since January 2000 (at either the age 30, age 34, or age 38 sweeps) were asked to update their situation from the date of their last interview. Cohort members that had not been interviewed since this date were asked to update their situation from 1<sup>st</sup> January 2000.

There were a few exceptions to this for the relationship history. Due to some errors in the programming of the relationship history section in 2004 (the age 34 sweep) some cohort members had been designated as 'repair cases' because the information about relationships between the age 30 sweep (in 2000) and the age 34 sweep (in 2004) was not reliable and needed to be collected again. For many of these the data had been repaired at the age 38 survey (in 2008) but there were still some designated 'repair cases' in 2012 as they had not taken part in the survey in 2008. For these cases, it was explained to them that there had been a problem with the script in 2004, and their relationship history was collected from the date of their age 30 survey (in 2000).

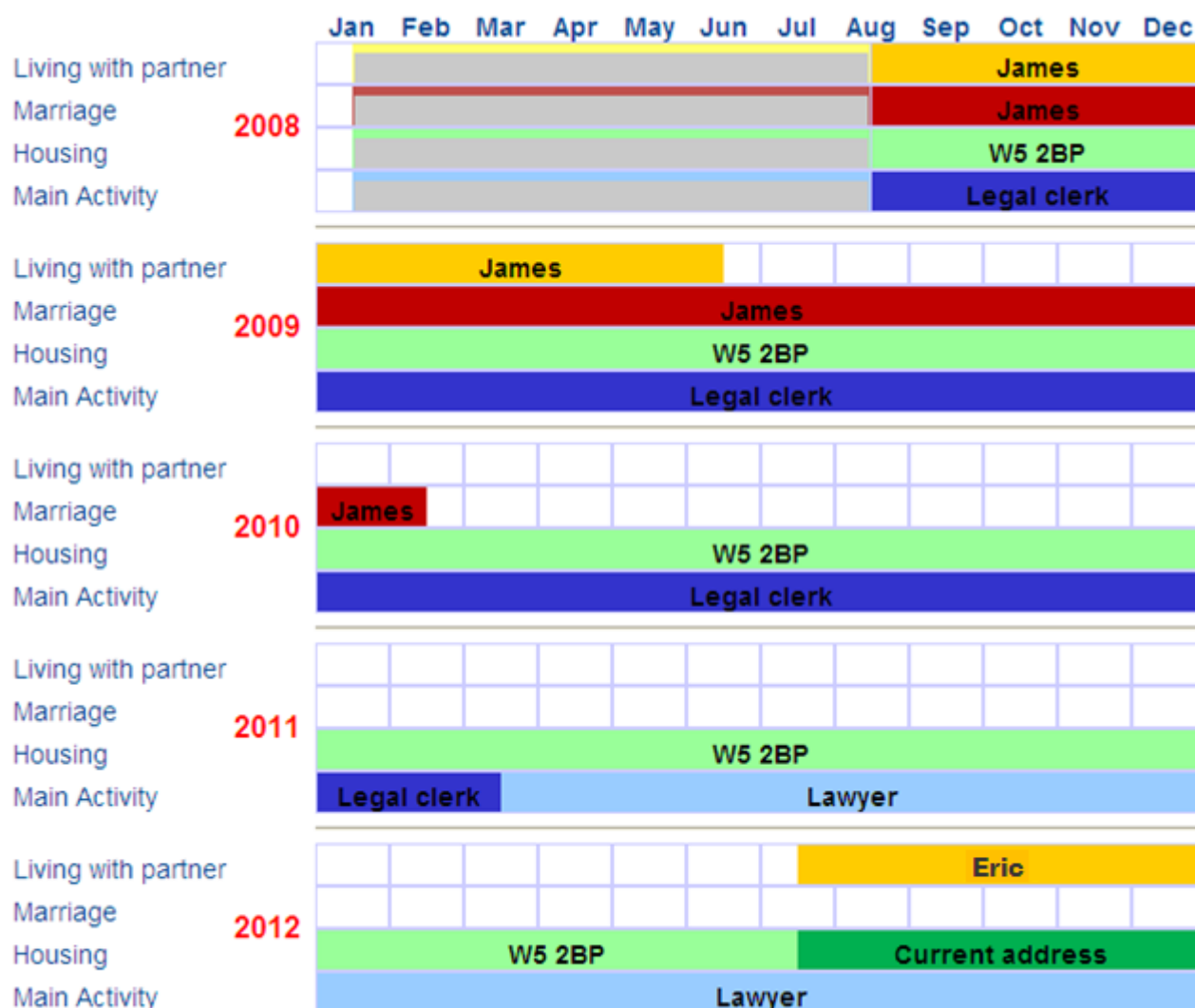
For the first time at this sweep the three histories were collected using electronic calendars, built into the CAPI script. The calendar would start from the point of the last interview (or from 1<sup>st</sup> January 2000) and fill in as the cohort member's history was updated. The calendar had one line for each of:

- Marriages (or civil partnerships) – this would be coloured in for any periods of marriage or civil partnership and would also display the name of the cohort member's spouse or civil partner;
- Cohabiting relationships – this would be coloured in for any periods of cohabiting with a partner (including a spouse or civil partner) and would also display the name of the partner;
- Where the cohort member lived – this would display the postcode, or the name of the town for each of the places the cohort member had lived since the start of the history;
- The cohort member's economic activity – this would display the cohort member's job title or other economic activity for each activity since the start of the history.

The completed lines of the calendar remained on screen for subsequent histories (so marriages and cohabitations appeared when the cohort member was asked about their housing history,

and marriages, cohabitations and housing all appeared when the cohort member was asked about their economic activity history).

To enable information to be easily viewed and to fit the calendar into the CAPI screen, calendars were split into years, so for a cohort member who was last interviewed in 2008, 2008 would appear at the top of the page (with the months before the 2008 interview blocked out in grey), 2009 would be below this, and so on. There is an example of the calendar screen below.



### 3.3.2. Vocabulary task

During the CAPI interview all cohort members were asked to undertake a vocabulary task. This was designed to test cohort member's understanding of the meaning of certain words. The vocabulary task included 20 words, each of which had another five words next to it. For each of the 20 words, cohort members were asked to select which of the five words next to it had a similar meaning to the original word. Cohort members were allowed four minutes to complete the task.

The task was completed on a paper document which was collected by interviewers and returned to TNS BMRB to be scanned. In the CAPI script the interviewer entered whether or

not the task had been completed and whether any factors affected the cohort member's performance in the task.

This vocabulary task was a shortened version of a vocabulary task that some cohort members completed at age 16.

### **3.3.3. Paper self-completion questionnaire**

In the majority of cases eligible cohort members were sent a paper self-completion questionnaire, to be completed in advance of the main CAPI appointment with the interviewer. This questionnaire was posted to the cohort member by the interviewer once an appointment had been made.

The paper self-completion questionnaire took approximately 20 minutes to complete. Where cohort members had not completed the paper self-completion by the time the interviewer arrived, they were asked if they could spare the extra time to complete it then and there.

If the paper questionnaire was completed before or during the CAPI appointment then it was collected by the interviewer to return to TNS BMRB. Where the paper questionnaires had not been completed before or during the CAPI appointment, the interviewer arranged to return to pick up the completed questionnaire or left a free post envelope for the respondent to return it to TNS BMRB themselves.

### **3.3.4. CASI interview**

Towards the end of the main CAPI interview the cohort member was asked to complete the self-completion questionnaire (CASI<sup>3</sup>). This section comprised of an eight minute interview covering attitudinal questions and issues which are more sensitive. Cohort members were encouraged to answer this section themselves but the interviewer could read the questions to the cohort member if they were not able to do so. At the end of this section, the cohort member was asked to confirm they had completed the section and then "lock up"<sup>4</sup> the CASI section so that the answers could not be looked at by the interviewer before handing the laptop back to the interviewer.

### **3.3.5. Collection of consents**

Towards the end of the interview the CAPI script prompted interviewers to collect consent from cohort members, and their partners (if they were cohabiting), to link the data collected in the study over the years with information from records which are routinely collected by government departments and agencies. These records are held by the National Health Service (NHS), Her Majesty's Revenue and Customs (HMRC), and the Department for Work and Pensions (DWP) respectively. The information contained in the health records focus on details of hospital visits, any long lasting health conditions, treatments received and medications prescribed. The economic records from DWP and HMRC include details of benefits being received, national insurance and tax payments, and a full employment history.

Cohort members and their partners had to consent separately and distinct consent forms were provided, one for the cohort member and one for the partner. They were asked to give three

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<sup>3</sup> CASI stands for Computer Assisted Self Interview

<sup>4</sup> This involved the cohort member pressing 'continue' to move on from a screen after which there was no 'back' button so it was not possible to move back through the questionnaire to the CASI section.

consents: one to allow CLS to access information relating to NHS records, one to allow access to DWP records, and one to allow access to HMRC records. All three consents were included on each consent form but the cohort member and partner could opt to consent to none, one, two, or all three types of data linkage. The consent form was carbon-backed and printed in duplicate. One copy was retained by the cohort member and/or partner, and the other copy taken by the interviewer and returned to TNS BMRB.

An information leaflet explaining why CLS wanted to link to records and the records they would be looking at was provided by the interviewer when seeking consent. In circumstances where the partner was not available, the cohort member was asked to pass on the consent form and leaflet to their partner, along with a letter addressed to the partner with more detail about why the study wanted to link to their records. Copies of the consent forms and leaflet can be found in the appendix.

### **3.3.6. Collection of contact information**

The final module of the CAPI questionnaire confirmed and updated the cohort member's contact information. This module was completed by a proxy in the case of proxy interviews. Cohort members (or proxies) were asked to confirm, update or provide their name, address, up to three telephone numbers (home, work and mobile), and their email address. They were also asked for the name and mobile telephone number of their partner (if applicable), and asked to confirm, update or provide contact details for one or two stable contacts, who could be contacted in the future to help trace the cohort member if they had moved.

## 4. Development work

### 4.1. Scope of the development work

The pilot and development stages of the age 42 survey were conducted over an 11 month period from April 2011 to February 2012.

The programme of development work included a pilot study and a dress rehearsal. These development stages helped determine the content and order of the interview, the interview length, interviewer protocols and instructions, and the design of the survey documents. The dress rehearsal also tested sample management procedures – particularly important as the study was using an entirely electronic sample management system for the first time.

### 4.2. First pilot survey

#### 4.2.1. Objectives

The first pilot survey took place in August 2011. The objectives of this pilot were to:

- Estimate the length of the CAPI interview, in order to establish whether any questions needed to be cut before the dress rehearsal;
- Test and evaluate the content of the CAPI interview and self-completion questionnaire;
- Test and evaluate some of the fieldwork documents, interviewer training and fieldwork procedures<sup>5</sup>.

A further pilot objective was to establish a separate panel of pilot respondents who could be used for future waves of the survey. As such, interviewers were required to recruit eligible members of the public within a specific age range, and those who took part in the pilot interviews were asked at the end of the survey whether they would be willing to be recontacted at future waves of the survey.

#### 4.2.2. Elements included in the first pilot

The pilot included all the elements that were intended to be used on the age 42 survey:

- The CAPI questionnaire, including the self-completion (CASI) section
- The paper self-completion questionnaire
- The vocabulary task
- Collection of data linkage consents

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<sup>5</sup> These could not all be tested since the pilot was not conducted using cohort members so some of the fieldwork materials and procedures were necessarily different.

Although the data linkage consents were included to test procedures for administering these, there were no plans to actually request data from government departments to link to survey data for pilot respondents.

#### **4.2.3. Pilot briefing and fieldwork**

Seven interviewers were briefed to work on the pilot by researchers from TNS BMRB and CLS. The interviewers worked in a mixture of urban and rural locations across England. There was also a debrief for all seven interviewers that worked on the pilot.

The pilot was carried out from the 1<sup>st</sup> August to the 22<sup>nd</sup> August 2011. The briefing was held on the 1<sup>st</sup> August and the de-brief on the 22<sup>nd</sup> August.

#### **4.2.4. Pilot sample**

The aim of the pilot was not to provide a representative sample, but rather to recruit members of the public of a similar age to the cohort members who could act as a first test sample to ensure that most questionnaire routes were tested.

Interviewers were required to screen and recruit members of the general public in their areas, aged between 37 and 47, to fill quotas aiming to include a roughly equal split of men and women. Interviewers were provided with a quota sheet detailing who to interview. In order to ensure that enough interviews were completed with people who were in work, interviewers were asked to work at least some of their assignment in evenings and at weekends. The number of people in work was monitored throughout fieldwork to ensure that sufficient numbers of interviews with people in work were achieved.

In order to encourage response and increase participation, interviewers were supplied with some materials to use, including a letter detailing the nature of the study and a colour information leaflet with further details. In addition respondents were offered a £20 cash incentive for participating in the survey.

Interviewers were also encouraged to use snowballing techniques to find potential respondents in the age range. This meant that the interviewer could ask respondents or other people in the area if they knew anyone in the area who might fit the criteria for the interview.

#### **4.2.5. Key findings and changes**

Both the CAPI interview and the self-completion questionnaire were generally well received by respondents. Revisions needed for the dress rehearsal were mainly either minor amendments to wording, layout or routing, or cuts required as the interview was longer than the intended 60 minutes. The key findings for each element of the pilot are detailed below.

##### ***CAPI interview***

- When giving dates for things like relationship start/end dates, dates of household members moving in/out, dates moved home, dates changed job/economic activity some respondents struggled to remember the month but almost all could give the year.
- Several respondents were unhappy with being asked for so much detail about their finances – either because they found these questions difficult to answer or because they thought they were intrusive. However, most respondents did answer these questions.

- Several female respondents were unhappy with the questions around menstruation and questioned why they needed to give this information/how it was relevant to the survey. Again, most respondents did answer these questions.
- Interviewers were uncomfortable with the question asking about children who had died and thought this could be worded differently.
- Questions about friends' occupations were time consuming and were not answered well – many respondents had a reasonable idea of what their friends did, but could not provide a lot of detail.
- There was some confusion in both the housing loop and the economic activity loop about which particular home/activity/job questions were referring to. This was mostly an issue for people who had had several changes of home/activity/job in the last few years.
- Several respondents did not know much about their partner's occupation, pay or highest qualifications. A few respondents also mentioned not being happy about being asked this sort of information as their partner had not been given a chance to consent to this information being given.
- Some respondents found it difficult to say how much they received in benefits – particularly if benefits were paid straight into their bank accounts (e.g. child benefit) or if benefits were combined together and/or not paid directly to them (e.g. housing benefit and council tax benefit).
- Difficulties were also observed with answering questions around the level of qualifications. Respondents did generally know the name of qualifications they had gained, but could not always give the level (e.g. NVQ, City and Guilds).

### ***Self-completion***

- The self-completion questionnaire was generally well understood and easy to follow.
- Some respondents found some of the attitudinal statements difficult to understand and answer and felt that more clarification was needed.
- The answer scale of "At least once a week", "At least once a month", "Several times and year", "Once a year or less" and "Never/almost never" was confusing for respondents.
- Some additional routing was required around the questions on alcohol.

### ***Vocabulary task***

- Respondents generally enjoyed completing the vocabulary task and were willing to have a go. The data showed a good range of scores was achieved.
- Some minor amendments to the instructions and data sheet could make the completion and administration easier, if comparability is not affected.

- Further guidance for interviewers was needed on the administration of the task in order to ensure it is standardised.

### ***Data linkage***

- All respondents completed the data linkage form and 59% of pilot respondents consented to linking their data for both health and economic records.
- One particular reason for refusing mentioned by respondents was that they would need more specific information about which records would be linked and what would be done with this information, in order to consent.
- The placing of the data linkage consent at the end of the interview was generally seen to be unproblematic although some interviewers felt that there was a lot of information to take in for respondents at this stage of the interview.

## **4.3. Second pilot survey – the Dress Rehearsal**

### **4.3.1. Objectives**

The second pilot survey was a dress rehearsal and took place in December 2011 to January 2012. The sample for the dress rehearsal was drawn from cohort members, which allowed the whole survey process to be tested. The main aims of the dress rehearsal were:

- Estimate the length of the CAPI interview, in order to establish whether any questions need to be cut before the main survey;
- Test and evaluate the content of the CAPI interview and self-completion questionnaire;
- Test and evaluate the fieldwork documents, interviewer training and fieldwork procedures;
- Test the electronic sample management system.

It was also intended that data from the dress rehearsal would be combined with data from main stage fieldwork, and this was done (see section 7.4).

### **4.3.2. Elements included in the Dress Rehearsal**

The dress rehearsal included all the elements that were intended to be used on the age 42 survey:

- The CAPI questionnaire, including the self-completion (CASI) section
- The paper self-completion questionnaire
- The vocabulary task
- Collection of data linkage consents.

### **4.3.3. Dress Rehearsal briefing and fieldwork**

The dress rehearsal was carried out from the 3<sup>rd</sup> December 2011 to the 16<sup>th</sup> January 2012. The briefing was held on the 25<sup>th</sup> November 2011 and there was a de-brief on the 17<sup>th</sup> January 2012.

Ten interviewers worked on the dress rehearsal covering the following areas: Devon (Tiverton), West London (Chiswick), South Glamorgan (Penarth), Crawley, Manchester, North London (Enfield), Nottingham, North Yorkshire (Northallerton), Glasgow, and Suffolk (Lowestoft).

#### 4.3.4. Dress Rehearsal sample

A sample of 150 cohort members (broken down into 10 interviewer assignments of 15 cohort members each) was selected for the dress rehearsal. Areas were selected to include a range of urban and rural locations, varying from relatively affluent areas, to more disadvantaged areas. The only other criterion used in selection was the sweep of last interview – the profile of this was kept similar to the sample for the main survey. Table 4.1 below shows the profile of sweep last participated in the survey for the sample issued for the dress rehearsal.

**Table 4.1: No. cases issued for DR by sweep of last interview**

	n
1975	1
1980	4
1986	1
2000	3
2004	22
2008	119
TOTAL	150

All cohort members selected for the dress rehearsal were sent a letter and information leaflet to give them some information about the age 42 survey and tell them an interviewer would contact them soon. The letter also explained that they were being contacted for the age 42 survey when they were still 41 as the survey was being tested.

#### 4.3.5. Response

Of the 150 cohort members issued for the dress rehearsal, 125 completed an interview. However, due to an issue with the script, some data was lost for 4 of these interviews.

There were 3 refusals, 6 cohort members could not be traced, and 16 cases were unproductive for another reason:

- 6 could not be contacted;
- 3 were not available within the fieldwork period;
- A further 2 were away or in hospital throughout the fieldwork period;
- 2 were movers who were traced but were outside the fieldwork areas included in the dress rehearsal;

- The remaining 3 had made an appointment to be interviewed, but the appointment was broken and could not be rescheduled within the fieldwork period.

Most of the unproductive cases were issued to an interviewer again when the main fieldwork began later in 2012.

#### **4.3.6. Key findings and changes**

In general, the dress rehearsal went well, and the response rate of 83% was very encouraging, but some changes were needed as a result. The key findings are detailed below.

##### ***Length***

The CAPI interview was longer than intended. It was intended to last an hour but the average interview length was 1 hour, 12 minutes and 35 seconds.

##### ***Paper questionnaire***

Sending the self-completion paper questionnaires to respondents in advance of their interview, after making an appointment, worked well – most respondents had completed the questionnaire so the interviewer could collect it during the CAPI interview.

##### ***Vocabulary task***

The vocabulary task was well liked by respondents – many enjoyed doing it and it provided a good break in the interview. It is particularly well placed, therefore, coming after the long employment and income section.

##### ***Data linkage***

The dress rehearsal trialled sending data linkage forms and a leaflet to cohort members in advance of the interview. This appeared to be off putting to respondents. Interviewers reported that respondents had concerns over data linkage as a result of reading the leaflet and some had made up their minds not to do it. For the main survey it was therefore decided that forms would be given to respondents towards the end of the interview. This way the interviewer would have built up rapport with the respondent and could explain the data linkage process to them.

## 5. Conduct of fieldwork

All interviews were conducted by interviewers working for TNS BMRB, in England, Scotland and Wales (including the channel islands). A total of 274 interviewers worked on the age 42 survey.

### 5.1. Briefings

All interviewers that worked on the age 42 survey were briefed by members of the research team at TNS BMRB. Researchers from CLS attended some of the briefings. A total of 23 briefings were conducted from April to November 2012, with the majority in April and May 2012.

Briefings lasted for one day and covered the following topics:

- Background information – what is BCS70, who are the cohort members, how has the study been used so far?
- An overview of interviewer's tasks on the Age 42 survey;
- Making initial contact with cohort members – use of advance letters and information leaflets, making contact by telephone/in person, introducing the study, use of appointment letters;
- The paper self-completion questionnaire – procedures for administration;
- Tracing cohort members – tracing procedures and letters;
- Overview of CAPI interview – modules included, use of feed forward data, proxy interviews;
- Vocabulary task – standardised administration, interviewers also had a go at the vocabulary task themselves;
- Data linkage – why it is important for the study, procedures and documents, answering questions;
- Run through of an interview on screen;
- Recording contact attempts – accessing contact information, information required and use of the electronic contact sheet;
- Making contact by telephone and avoiding refusals;
- Fieldwork dates and expected response rate.

Interviewers were also given 15 practise cases so they could practice using the electronic contact sheet and the survey script before attempting any real interviews.

## **5.2. Materials for interviewers**

Interviewers were sent 'packs' containing all the materials they needed for working on the study. The packs included:

### **Contact materials**

A sample information sheet for each cohort member in their assignment (this included basic contact information – the majority of contact information was held electronically)

An assignment map showing the locations of addresses in their assignment

An assignment sheet listing all cohort members in their assignment

### **Advance materials**

Advance letters for sending to respondents (pre-printed plus a few spare generic copies)

Survey leaflets for including with the advance letters sent to respondents (including a few spare copies)

Appointment letters (for sending once an appointment was made)

Envelopes and stamps for posting the advance letters and appointment letters

### **Tracing materials**

Occupier letters

Tracing letters

Stable contact tracing letters

Freepost envelopes for returning tracing slips

Envelopes and stamps for posting the tracing letters

### **Paper questionnaire**

Paper self-completion questionnaires (cohort member specific plus a few spare copies)

Freepost envelopes for returning questionnaires

### **Data linkage materials**

Cohort member data linkage consent forms (pre-printed with serial numbers plus a few spares)

Partner data linkage consent forms (pre-printed with serial numbers plus a few spares)

Data linkage information leaflets

Letters about data linkage for partners

FAQ prompt cards for interviewers about data linkage

### **Vocabulary task materials**

Vocabulary task instructions

Vocabulary task answer forms (pre-printed with serial numbers plus a few spares)

## **Other materials**

Project instructions

Showcards

Change of address cards

Calling cards

Thank you leaflets

### **5.3. Interviewer assignments**

Before fieldwork started the original issue sample was grouped into three waves, and into 794 assignments within waves. Assignments were created based on geographical clustering. Assignment sizes varied from just one cohort member, up to 31 cohort members but 96% of assignments included between 12 and 18 cohort members, and 74% included exactly 15 cohort members. Interviewers could be given more than one assignment within each wave.

Additional sample that was issued after the start of fieldwork was allocated to the closest assignment that had not yet been completed. If there were no nearby incomplete assignments then a new assignment was created. As the NHS traced cases were issued quite late in fieldwork there were few remaining incomplete assignments and so these were mostly allocated to a new wave (wave four) and clustered into assignments. These wave four assignments generally only included between one and five cohort members as the NHS traced sample was widely geographically spread.

### **5.4. Issuing sample to interviewers**

Sample was allocated to interviewers based on their geographical closeness to an assignment and their availability during the fieldwork period.

Interviewers were sent their packs and sample information at the beginning of each fieldwork wave<sup>6</sup>. Most sample information was provided electronically, but they were also provided with some information on a sample information sheet for each cohort member.

Interviewers were asked to review their assignment as soon as they had received sample information to ensure it included no one they knew, and also to look at whether there were any 'likely movers' included as these cases were likely to need time to trace. In general, interviewers were asked to start work on their assignment early in fieldwork to allow plenty of time for contacting and interviewing cohort members.

#### **5.4.1. Electronic contact sheet**

There were two parts to the electronic contact sheet (ECS).

The first was a grid which included a line for each cohort member in the interviewer's assignment with summary information including serial number, address, current outcome, and appointment details. From this grid interviewers could open a supplementary page which included details of all contact attempts with that cohort member (date and time, type of

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<sup>6</sup> With the exception of a minority of cases where allocation had taken longer, and so interviewers were issued sample a week or two after the start of the fieldwork wave.

contact attempt, outcome, and notes), and also included all available contact information and other useful information about that cohort member:

- Serial number
- Cohort member name
- Cohort member gender and date of birth
- Cohort member address (and date address last confirmed)
- Cohort member telephone numbers (home, work and mobile)
- Address at last interview
- Type of residence at last interview
- How first contact should be attempted (telephone or face to face)
- Whether a likely mover or likely refusal
- Year of last interview
- Outcomes in 2000, 2004 and 2008
- Reason for not taking part 2008
- Whether cohort member was known to be blind or deaf or have literacy problems
- Flag to show whether a proxy interview was conducted in 2004 (name and relationship of proxy, and reason for proxy interview)
- Delicate memo (this included information that interviewers must have read before contacting the cohort member)
- Useful memo (this included information that interviewers might find useful)
- Cohort member email address
- Partner name
- Partner's mobile telephone number
- Other telephone number
- Stable contact 1 name, relationship to cohort member, and contact details
- Stable contact 2 name, relationship to cohort member, and contact details

The second part of the ECS was a CAPI script which the interviewer used to record contact attempts, enter new contact details, and record outcomes. This then updated the information in the grid section of the ECS.

### **5.4.2. Sample information sheet**

The sample information sheet contained the following information

- Serial number
- Area code
- Cohort member name
- Cohort member address
- Home telephone number
- Mobile telephone number
- Work telephone number
- Whether cohort member was a likely mover
- 2008 survey outcome
- Mode of first contact (telephone or face to face)
- Whether partner contact details were available
- Whether stable contact details were available

Although this duplicated some of the information provided in the ECS, it was deemed useful as it provided interviewers with a quick reference document. Some interviewers also found it useful for making notes on, writing on new contact information or appointment details.

### **5.5. Pre-notification of cohort members**

Not long before the start of fieldwork all cohort members were sent a birthday card by CLS. Included with this mailing was a letter which informed cohort members that the Age 42 survey would start soon and an interviewer from TNS BMRB would contact them. There was also an eight page leaflet giving some recent findings and press coverage of the study.

### **5.6. Contact procedures**

#### **5.6.1. Stage 1: Advance letter and survey leaflet**

Every cohort member included in the Age 42 survey was sent an advance letter before an interviewer tried to contact them. These letters were posted by interviewers, generally a few days before their first attempt at contacting the cohort member.

There were four different types of advance letter:

- One for original issue cases that had refused to take part in the 2008 survey
- One for original issue cases who had not been contacted at the 2008 survey
- One for the remaining original issue cases (most of whom had taken part in the 2008 survey)

- One for NHS traced cases.

All four letter types introduced the study, stated its importance and the importance of cohort members' continuing participation, but the wording varied slightly to be more relevant based on cohort members' response at the previous survey. The letter also reminded cohort members about data confidentiality, provided a freephone number and explained TNS BMRB's role in the survey.

A leaflet was also sent with these letters. The leaflet gave cohort members more information about the Age 42 survey, including the topics covered by the survey, that there would be a face to face interview and a paper questionnaire, and that they would be asked for consent to data linkage.

Copies of the advance letter and leaflet are included in the appendices.

### **5.6.2. Stage 2: Telephone contact with cohort members**

For the majority of original issue sample cases, interviewers were asked to attempt to make their first contact with respondents by telephone. This was partly for the convenience of cohort members – so they could arrange a convenient time for an interview rather than having an interviewer just turn up. It also aimed to improve fieldwork efficiency by reducing the time interviewers spent travelling to addresses only to find no one home.

Cohort members were allocated to initial telephone contact if a telephone number was available and if: they had taken part in the 2008 survey; or they had taken part in the 2004 survey and not refused at the 2008 survey. This meant that 80% of the original issue sample was allocated to initial telephone contact.

If interviewers were unable to contact these cohort members by telephone, then they tried making personal visits.

### **5.6.3. Stage 3: Personal visits**

For the remaining original issue sample that did not fulfil the criteria for initial telephone contact, and for all the NHS traced cases interviewers were instructed to attempt to contact cohort members by making personal visits. Interviewers could, however, attempt to contact these cohort members by telephone (if a telephone number was available) if they were unable to contact them through making personal visits.

Interviewers were supplied with calling cards to leave behind if no one was at home when they visited an address – these let household members know that they had called and would call back another time. They also included a freephone number for TNS BMRB so cohort members could call to arrange an appointment after receiving a card.

If interviewers were unable to contact cohort members by telephone or by making personal visits then they were expected to follow tracing procedures. These are outlined in the next section.

## **5.7. Tracing cohort members**

If interviewers found that the cohort member no longer lived at the issued address, there were several steps they were expected to undertake to try to trace the cohort member, before returning the case for further tracing by CLS:

- Trying all available telephone number for the cohort member, particularly mobile and work numbers to see if the cohort member could be contacted this way;
- Asking current occupiers for a new address or other contact information for the cohort member;
- Asking neighbours for a new address or contact information for the cohort member;
- Calling the cohort member's partner's mobile telephone number (if available) to ask them for up to date contact details for the cohort member;
- Contacting stable contacts (if available) to ask them for a new address or other contact information for the cohort member.

If any of these steps led to a new address being provided for the cohort member, interviewers would enter this address into the electronic contact sheet (ECS). They also recorded whether the address was in their area or not. If it was, the interviewer would send the cohort member an advance letter at the new address before visiting. If the new address was outside the interviewer's area it would be returned to head office for re-allocation to a more local interviewer.

If interviewers' tracing attempts were unsuccessful the case would be returned to CLS for further tracing. Cases for tracing were sent to CLS weekly throughout fieldwork in a 'mover' file. This file included details of all the tracing attempts already undertaken by interviewers.

Mover files were sent to CLS weekly throughout fieldwork. Table 5.1 shows the number of cases sent in each fieldwork month.

**Table 5.1: Number of movers sent to CLS in each fieldwork month**

<b>Month</b>	<b>Number of cases</b>
June 2012	61
July 2012	121
August 2012	73
September 2012	22
October 2012	62
November 2012	133
December 2012	118
January 2013	130
February 2013	168
March 2013	131
April 2013	50

### **5.7.1. Tracing letters**

Interviewers were issued with tracing letters that they could use to help the tracing process. These letters were used if interviewers spoke to someone (such as a neighbour) who knew the new address of the cohort member but was not happy to pass this information to the interviewer. The tracing letter was addressed to the cohort member. It explained that we were trying to contact them for the study and asked them to contact TNS BMRB with their new contact details. Interviewers would put this letter in a stamped envelope and ask the person who knew their address to post or give it to the cohort member.

There was also a stable contact tracing letter. This was addressed to the stable contact. It explained that we were trying to contact the cohort member, and that the cohort member had nominated them as someone who may be able to help find them. The letter asked the stable contact to contact TNS BMRB to provide the cohort member's new contact details, or to pass the letter on to the cohort member so they could contact TNS BMRB with their new details.

Interviewers used the stable contact tracing letter if they could not contact the stable contact by telephone and their address was too far away to visit. Interviewers also used this letter if they had spoken to the stable contact but they were reluctant to provide a new address for the cohort member.

Copies of these tracing letters are included in the appendices.

### **5.7.2. Occupier letter**

If interviewers had made several attempts to contact an address but had not managed to contact anyone there and had not been able to confirm with neighbours whether the cohort member still lived there, they could use the occupier letter. The occupier letter was addressed to the resident of the address. It explained that we were trying to contact the cohort member at that address and asked them to either call TNS BMRB or return a slip from the bottom of the letter to confirm whether the cohort member lived at the address, and to provide a new address for the cohort member (if applicable) if possible.

A copy of the occupier letter is included in the appendices.

## **5.8. Making appointments**

Once interviewers made contact with a cohort member, they generally tried to make an appointment for an interview rather than trying to interview them straight away. The CAPI interview lasted around an hour and there was a paper self-completion questionnaire (preferably completed in advance of the interview) so, in most cases, it was appropriate to make an appointment.

Once interviewers had agreed an appointment time with cohort members, they would send them an appointment letter (or give it to them if they were making an appointment in person). This letter included a space for the interviewer to write in the appointment date and time. The letter also asked the cohort member to complete the paper self-completion questionnaire in advance of their interview, and this paper questionnaire was sent (or given) to the cohort member along with the appointment letter.

A copy of this letter is included in the appendices.

## 5.9. Sample management during fieldwork

CLS continued to trace cohort members until the start of fieldwork. In some cases, CLS received information about cohort members after the sample had been sent to TNS BMRB. CLS began sending sample updates six weeks before fieldwork began. These sample updates consisted of three types:

- Changes in classification information: eligibility status, participation status, status of address
- Changes to contact information: change of address, telephone numbers, names, sex, dates of birth, stable address details, etc
- Other information useful for contacting and tracing.

The action taken as a result of the sample updates depended on the type of sample update and the progress of the case, that is whether interviewers had already worked on a case or not.

Table 5.2 summarises the actions taken by TNS BMRB as a result of sample updates from CLS.

Changes to other contact information, such as names, sex, dates of birth, etc. were not normally notified to TNS BMRB.

Respondents also sometimes contacted TNS BMRB with information. This information was handled in the same way as the sample updates from CLS.

**Table 5.2: Actions taken as a result of sample updates**

Type of update	Not yet issued to interviewer	Issued to interviewer and not yet returned with final outcome	Issued to interviewer and returned with final outcome
Change in eligibility status, i.e. death or emigration of cohort member	Appropriate outcome assigned and case not issued to an interviewer.	Interviewer notified, interviewer recorded appropriate outcome code no further contact attempts made.	If case had a productive outcome, no action. If case had an unproductive outcome then outcome updated to reflect change of status.
Change in participation status (e.g. cohort member refused to take part)	As above	As above	As above (and the case would not be considered for re-issue).
Change in address status: issued address invalid and no new address	Case issued to interviewer and interviewer told to start tracing activities asap.	Interviewer notified and asked to start tracing activities asap (if not already started).	No action

Change to contact information	The sample database was amended and the updated contact information was issued to an interviewer.	<p>If the change was a new address in a different area then the original interviewer was notified and the case was re-allocated to a more local interviewer.</p> <p>If the new contact information was not a change of area then the updated contact details were electronically submitted to the interviewer and they were notified of the update<sup>7</sup>.</p>	<p>For productive outcomes, and unproductive outcomes where the interviewer had made contact with the cohort member, the sample database was amended and the updated contact information was used when the case was returned to CLS.</p> <p>For unproductive cases with untraced or non contact outcomes, the case was re-issued.</p>
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### 5.9.1. Sample updates by interviewers

Interviewers were responsible to updating contact information for all cases issued to them. As already mentioned, if interviewers uncovered new contact information for cohort members, they would enter this as part of the electronic contact sheet and this would be used to update the sample database.

For productive cases there was also a module at the end of the questionnaire where interviewers would confirm and collect contact information with cohort members. This module confirmed or asked for the following contact details:

- Cohort member name
- Cohort member address
- Cohort member home, work and mobile telephone numbers
- Cohort member email address
- Partner's name and mobile phone number (if cohort member lived with a partner)
- Name, relationship to cohort member, address, two telephone numbers, and email address for two 'stable contacts'.

### 5.10. Fieldwork progress

Fieldwork began in May 2012 and finished in April 2013. This was a longer fieldwork period than was originally anticipated, partly due to the late issue of the cases traced through the NHS. The automatically traced cases became available in November 2012 and the manually traced cases became available in February 2013. While these cases were in field, earlier waves were allowed to continue in field to maximise chances of contacting and interviewing cohort members. All waves therefore finally finished at the end of April 2013.

Table 5.3 below shows the number of interviews achieved each month, broken down by fieldwork wave.

<sup>7</sup> This functionality of the electronic sample management system was not available at the start of fieldwork. Earlier in fieldwork, interviewers would be notified of the new contact details and would manually record the new details using the electronic contact sheet.

**Table 5.3: Number of interviews per month**

	Wave 1	Wave 2	Wave 3	Wave 4	Total
May 2012	342	0	0	0	342
June 2012	1,062	0	0	0	1,062
July 2012	896	147	0	0	1,043
August 2012	379	1,227	0	0	1,606
September 2012	144	630	0	0	774
October 2012	172	496	683	0	1,351
November 2012	172	483	1,086	0	1,741
December 2012	45	113	279	0	437
January 2013	106	134	176	246	662
February 2013	89	87	60	107	343
March 2013	54	60	33	84	231
April 2013	46	33	14	32	125
Total	3,507	3,410	2,331	469	9,717

### 5.11. Progress reporting

Fieldwork progress reports were sent to CLS weekly, from 22<sup>nd</sup> May 2012 until the end of fieldwork. These reports included:

- Outcomes by Government Office Region
- Outcomes by sweep of last interview
- Outcomes by fieldwork wave
- Outcomes by outcome at previous survey (in 2008)
- Outcomes for 'likely movers'
- Outcomes for 'likely refusals'
- Outcomes by whether original issued sample or NHS traced case
- Completion rates of the paper self-completion questionnaire, the self-completion (CASI) element of the main interview, and the vocabulary task, broken down by fieldwork wave
- Consent rates to data linkage, broken down by fieldwork wave
- Information on success of tracing movers (both in the field, and at CLS)

- Outcomes for people who had moved from the original issued address
- Information on the success of attempting to contact cohort members by telephone.

### 5.12. Re-issues

The following unproductive outcomes were considered for re-issue:

- Non contact
- Broken appointment
- Refusal to interviewer
- Ill at home during survey period
- Away/in hospital throughout field period
- Physical or learning disability/difficulty
- Language difficulties
- Other unproductive

Each case with these outcomes was examined to gauge whether it might be converted to a productive outcome if re-issued. Non contacts were generally re-issued unless a very high number of contact attempts had been made. Broken appointments were almost all re-issued unless interviewer comments gave a good reason for them not to be. For refusals, reasons for refusal, interviewer comments and whether the interviewer recorded the case should not be re-issued or was a permanent refusal were all examined. For other outcomes the interviewer's notes were examined to see if the case might be worth re-issuing.

In total, 1,244 cases were selected for re-issue and these resulted in 256 full interviews and one proxy interview.

**Table 5.4: Outcome of re-issued cases**

	n	%
Productive	257	20.7
Non contact	174	14.0
Refusal	594	47.7
Other unproductive	219	17.6
Total	1,244	

### 5.13. Translations

Cohort members living in Wales received the advance letter and information leaflet in English and Welsh. These were the only documents that were translated and, because all cohort members were educated in the British school system, interpreters were not necessary for the CAPI interview.

### 5.14. Thank you letter

Thank you letters were sent to all cohort members who had taken part in the study. These were sent on a weekly basis, around two weeks after the cohort member had completed an interview.

As well as thanking the cohort member for taking part, if they had been left with any documents (paper questionnaires or consent forms) and these had not yet been returned, the letter requested that they complete and return these documents.

### **5.15. Fieldwork quality control**

All interviewers were required to attend a one-day briefing. The briefing covered all elements of the survey and also involved a practice run through of the questionnaire. Interviewers were also given 'test cases' as part of their assignment and were instructed to use these to practice going through the interview script at home before starting their assignment.

Interviewers' work was checked when it was returned to the office to ensure that sufficient tracing was undertaken where necessary, that outcome codes were assigned correctly, and that all necessary paperwork, such as consent forms and paper self-completion questionnaires, was returned. If it was felt that an interviewer had not tried hard enough to trace respondents that had moved, then the case was returned to the interviewer for further tracing.

Our standard quality procedures at TNS BMRB are for interviewers to be accompanied by a supervisor at least twice a year. We also back check at least ten percent of interviews on all projects. This involves respondents being re-contacted by phone (or by post if we are unable to contact them by phone) to confirm key pieces of information about the interview process.

The interviewer's route through the CAPI questionnaire was programmed so that all relevant questions came on route according to the cohort member's earlier answers. Consistency checks of values and measurements were built into the CAPI. The "hard" checks did not allow entries outside a given range, and the "soft" checks asked the interviewer to confirm what he or she had entered. Soft checks were usually triggered where values were implausible but not impossible.

### **5.16. Fieldwork complaints**

Complaints about the survey could be received by TNS BMRB or by CLS. Either way, there was a standard procedure for dealing with complaints. All complaints were logged and acknowledged with a standard response explaining that the matter would be investigated fully.

Depending on the nature of the complaint it was then either dealt with by CLS (if it related to the nature of the study) or by TNS BMRB (if it related to the conduct of fieldwork). For complaints dealt with by TNS BMRB:

- The complaint was allocated an 'owner' who decided on and recorded the follow up action required, and ensured that the matter was dealt with in a timely fashion;
- Where the complaint was concerned with the actions of an interviewer, the interviewer concerned was contacted and their account of any incident recorded;
- Once the follow-up investigation was completed the complaint was assessed as being valid or invalid and an appropriate course of action was decided upon;
- If a complaint against an interviewer was upheld, the interviewer was informed in writing and any action required was documented;

- The complainant was written to confirming the nature of their complaint and the actions taken.

In total, eight complaints were received from cohort members during fieldwork. Five of these related to interviewer conduct, two related to cohort members being contacted when they thought they had previously opted out of the study, and one cohort member complained about being asked for consent to data linkage.

#### **5.17. Safety, consent and confidentiality issues**

As part of their general initial training, all interviewers were briefed on health and safety when working. Interviewers were also briefed to be mindful of respondent safety and confidentiality. Interviewers carry an ID badge and are instructed to always show this to respondents on the doorstep. Interviewers were also instructed to avoid mentioning the title of the study to anyone but the cohort member or their immediate family. As mentioned in the advance letter, the cohort member's answers were treated in strict confidence in accordance with the Data Protection Act. In addition, interviewers were not permitted to interview anyone known to them personally, such as a friend, a neighbour or a colleague. Such instances were re-assigned to other interviewers.

## 6. Survey response

### 6.1. Summary

A total of 9,717 cohort members were interviewed during main stage fieldwork between May 2012 and April 2013. This was a survey response rate<sup>8</sup> of 74.6%, and a co-operation rate<sup>9</sup> of 79.7%.

Of the 13,189 cohort members issued in the total sample, 92.5% (n=12,198) were successfully traced and eligible. The remaining 7.5% were made up of sample members who were confirmed to be ineligible (1.2%) or movers whose eligibility was uncertain as they could not be traced (6.3%). Where ineligibility was confirmed, it was found that 127 cohort members had emigrated and 30 had died. The "uncertain eligibility" category was made up of cohort members who had moved and could not be traced by either TNS BMRB or CLS, and some cases where there was no time to reissue or trace.

For completeness the response rates detailed in the tables of this chapter show both the "co-operation rate" (base excludes both confirmed and uncertain ineligibles) and the "survey response rate" (base excludes confirmed ineligibles only). For reasons of clarity the text accompanying the tables generally quotes figures for one of these only, and that is the co-operation rate.

**Table 6.1: Summary of sample eligibility**

	No. of cohort members	% of issued sample
Confirmed eligible	12,198	92.5
Confirmed ineligible	157	1.2
<i>Died</i>	<i>30</i>	<i>0.2</i>
<i>Moved abroad</i>	<i>127</i>	<i>1.0</i>
Uncertain eligibility (untraced movers)	834	6.3
Total issued sample	13,189	100

<sup>8</sup> The survey response rate is the percentage of productive interviews from the sample with known/possible eligibility, that is excluding those confirmed ineligible cohort members.

<sup>9</sup> The co-operation rate is the percentage of productive interviews from the sample of confirmed eligible cohort members that is excluding confirmed and uncertain ineligibles.

## 6.2. Details of survey response

Productive interviews were completed for 79.7% of the confirmed eligible sample (the co-operation rate). Productive cases were for the most part fully productive personal interviews (79.5%), with the remaining 0.2% made up of proxy interviews.

The unproductive cases were largely refusals (15.3%), made either directly to the office (1.7%), to the interviewer in person (13.7%).

The overall survey response rate was 74.6%.

**Table 6.2: Summary of contact and response**

	No. of cohort members	% of confirmed eligible sample	% of confirmed and uncertain eligible sample
Issued	13,189		
Confirmed ineligible	157		
Unconfirmed eligible/ineligible	834		
Eligible - includes confirmed eligible only	12,198	100	
Eligible - includes confirmed and uncertain eligible	13,032		100
		<b>%</b>	<b>%</b>
<b>Productive</b>	<b>9,717</b>	<b>79.7</b>	<b>74.6</b>
<i>Fully productive (personal)</i>	9,692	79.5	74.4
<i>Fully productive (proxy)</i>	25	0.2	0.2
<b>Unproductive</b>	<b>2,481</b>	<b>20.3</b>	<b>19.0</b>
<i>Non contact</i>	285	2.3	2.2
<i>Refusals</i>	1,871	15.3	14.4
- <i>Office refusal</i>	202	1.7	1.6
- <i>Refusal to interviewer</i>	1,669	13.7	12.8
<i>Other unproductive</i>	325	2.7	2.5
- <i>Broken appointment</i>	110	0.9	0.8
- <i>Away throughout fieldwork period</i>	65	0.5	0.5
- <i>Ill at home during survey period</i>	16	0.1	0.1
- <i>Physical or learning disability or difficulty</i>	22	0.2	0.2
- <i>Unknown if CM at address as info refused</i>	35	0.3	0.3
- <i>Interview achieved but CM requested data deletion</i>	2	<0.1	<0.1
- <i>Other reason</i>	75	0.6	0.6

### 6.2.1. Response by type of sample

Co-operation rates for original issue cases were much higher than for NHS traced cases (82.6% compared with 53.3%).

**Table 6.3: Response for original issue cases and NHS traced cases**

	Original issue cases	NHS cases	Total
Issued	11,654	1,535	13,189
Confirmed ineligible	133	24	157
Unconfirmed eligible/ineligible	547	287	834
BASE 1: Total sample with confirmed eligibility	10,974	1,224	12,198
BASE 2: Total sample including uncertain eligibility	11,521	1,511	13,032
Productive	9,064	653	9,717
Unproductive	1,910	571	2,481
<i>Non contact</i>	164	121	285
<i>Refusals</i>	1,494	377	1,871
<i>Other</i>	252	73	325
	%	%	%
<b>Co-operation rate (BASE 1, confirmed eligibility only)</b>			
Productive	82.6	53.3	79.7
Unproductive	17.4	46.7	20.3
<i>Non contact</i>	1.5	9.9	2.3
<i>Refusals</i>	13.6	30.8	15.3
<i>Other</i>	2.3	6.0	2.7
<b>Survey response rate (BASE 2, includes uncertain eligibility)</b>			
Productive	78.7	43.2	74.6
Unproductive	16.6	37.8	19.0

### 6.2.2. Response by survey wave

Response varied a little by wave. Waves 1 and 4 had higher proportions of sample with unknown eligibility than waves 2 and 3. This is because wave 4 consisted mostly of cases traced through the NHS for whom fewer contact details were available, so if they were no longer living at the issued address they were difficult to trace, and cases from the original issue sample that were known to no longer live at the issued address were almost all included in wave 1.

Wave 2 achieved a higher refusal rate than waves 1 or 3. This is likely to be because most cases that were identified as likely refusals were issued at wave 2.

**Table 6.4: Response by wave**

	<b>Wave 1</b>	<b>Wave 2</b>	<b>Wave 3</b>	<b>Wave 4</b>	<b>Total</b>
Issued	4,623	4,654	2,815	1,097	13,189
Confirmed ineligible	60	58	23	16	157
Unconfirmed eligible/ineligible	311	221	111	191	834
BASE 1: Total sample with confirmed eligibility	4,252	4,375	2,681	890	12,198
BASE 2: Total sample including uncertain eligibility	4,563	4,596	2,792	1,081	13,032
Productive	3,507	3,410	2,331	469	9,717
Unproductive	745	965	350	421	2,481
<i>Non contact</i>	100	66	31	88	285
<i>Refusals</i>	540	794	255	282	1,871
<i>Other</i>	105	105	64	51	325
	%	%	%	%	%
<b>Co-operation rate (BASE 1, confirmed eligibility only)</b>					
Productive	82.5	77.9	86.9	52.7	79.7
Unproductive	17.5	22.1	13.1	47.3	20.3
<i>Non contact</i>	2.4	1.5	1.2	9.9	2.3
<i>Refusals</i>	12.7	18.1	9.5	31.7	15.3
<i>Other</i>	2.5	2.4	2.4	5.7	2.7
<b>Survey response rate (BASE 2, includes uncertain eligibility)</b>					
Productive	76.9	74.2	83.5	43.4	74.6
Unproductive	16.3	21.0	12.5	38.9	19.0

### 6.2.3. Response by country of issue

Co-operation rates were slightly higher in England and Scotland (79.9% and 80.6% respectively) than in Wales (75.2%), and the refusal rate was correspondingly a little higher in Wales.

**Table 6.5: Response by country of issue**

	England	Scotland	Wales	Total
Issued	11,400	1,064	725	13,189
Confirmed ineligible	133	14	10	157
Unconfirmed eligible/ineligible	726	70	38	834
BASE 1: Total sample with confirmed eligibility	10,541	980	677	12,198
BASE 2: Total sample including uncertain eligibility	11,267	1,050	715	13,032
Productive	8,418	790	509	9,717
Unproductive	2,123	190	168	2,481
<i>Non contact</i>	254	21	10	285
<i>Refusals</i>	1,598	137	136	1,871
<i>Other</i>	271	32	22	325
	%	%	%	%
<b>Co-operation rate (BASE 1, confirmed eligibility only)</b>				
Productive	79.9	80.6	75.2	79.7
Unproductive	20.1	19.4	24.8	20.3
<i>Non contact</i>	2.4	2.1	1.5	2.3
<i>Refusals</i>	15.2	14.0	20.1	15.3
<i>Other</i>	2.6	3.3	3.2	2.7
<b>Survey response rate (BASE 2, includes uncertain eligibility)</b>				
Productive	74.7	75.2	71.2	74.6
Unproductive	18.8	18.1	23.5	19.0

#### 6.2.4. Response by sweep of last interview

As the table below shows, there is a very clear pattern showing that the co-operation rate increases, the more recently the cohort member was last interviewed, with a 91.2% co-operation rate amongst cohort members last interviewed in the 2008 sweep, dropping to 61.5% amongst cohort members last interviewed in the 2004 sweep, then around 40% - 50% for cohort members last interviewed longer ago than 2004. The unproductive cases for cohort members last interviewed longer ago than 2008 were mostly refusals (refusal rates of 30% or more).

**Table 6.6: Response by sweep of last interview**

	<b>Never interv iewed</b>	<b>1970</b>	<b>1975</b>	<b>1980</b>	<b>1986</b>	<b>1996</b>	<b>2000</b>	<b>2004</b>	<b>2008</b>	<b>Total</b>
Issued	8	104	96	668	756	384	976	1,526	8,671	13,189
Confirmed ineligible	0	3	3	14	13	5	18	49	52	157
Unconfirmed eligible/ ineligible	1	32	22	135	140	66	156	177	105	834
BASE 1: Total sample with confirmed eligibility	7	69	71	519	603	313	802	1,300	8,514	12,198
BASE 2: Total sample including uncertain eligibility	8	101	93	654	743	379	958	1,477	8,619	13,032
Productive	3	30	28	237	274	169	410	799	7,767	9,717
Unproductive	4	39	43	282	329	144	392	501	747	2,481
<i>Non contact</i>	0	9	13	49	41	22	51	50	50	285
<i>Refusals</i>	3	24	26	194	256	109	276	389	594	1,871
<i>Other</i>	1	6	4	39	32	13	65	62	103	325
	%	%	%	%	%	%	%	%	%	%
<b>Co-operation rate (BASE 1, confirmed eligibility only)</b>										
Productive	42.9	43.5	39.4	45.7	45.4	54.0	51.1	61.5	91.2	79.7
Unproductive	57.1	56.5	60.6	54.3	54.6	46.0	48.9	38.5	8.8	20.3
<i>Non contact</i>	0	13.0	18.3	9.4	6.8	7.0	6.4	3.8	0.6	2.3
<i>Refusals</i>	42.9	34.8	36.6	37.4	42.5	34.8	34.4	29.9	7.0	15.3
<i>Other</i>	14.3	8.7	5.6	7.5	5.3	4.2	8.1	4.8	1.2	2.7
<b>Survey response rate (BASE 2, includes uncertain eligibility)</b>										
Productive	37.5	29.7	30.1	36.2	36.9	44.6	42.8	54.1	90.1	74.6
Unproductive	50.0	38.6	46.2	43.1	44.3	38.0	40.9	33.9	8.7	19.0

### 6.3. Telephone contacts

For cohort members that had taken part in the 2008 sweep, or had taken part in the 2004 sweep and not refused in 2008, interviewers were instructed to attempt first contact by telephone, if a telephone number was available.

Telephone contact was attempted with 75.3% of the sample, contact was made by telephone with 58.5% (77.7% of the cases with which telephone contact was attempted) and an appointment was made over the phone with 56.1% (95.8% of the cases where contact was made by telephone).

Wave 3 had the highest level of telephone contact and appointments by telephone. A higher proportion of wave 3 were allocated to initial telephone contact than in the other waves as wave 1 included most of the original issue cases who had lost touch with the survey, wave 2 included most of the likely refusers, and wave 4 was cases traced through the NHS who had not been contacted by the survey for some time (none of these groups were allocated to initial telephone contact).

**Table 6.7: Telephone contact by wave**

	Wave 1	Wave 2	Wave 3	Wave 4	Total
A. Total sample	4,623	4,654	2,815	1,097	13,189
B. Telephone contact attempted	3,553	3,746	2,396	242	9,937
C. Telephone contact made	2,745	2,863	1,933	179	7,720
D. Appointment made by telephone	2,609	2,713	1,903	174	7,399
Telephone contact attempted (as % of A)	76.9	80.5	85.1	22.1	75.3
Telephone contact made (as % of B)	77.3	76.4	80.7	74.0	77.7
Appointment made (as % of C)	95.0	94.8	98.4	97.2	95.8
<b>Overall percentage of sample where appointments made by telephone</b>	<b>56.4</b>	<b>58.3</b>	<b>67.6</b>	<b>15.9</b>	<b>56.1</b>

### 6.4. Movers and tracing

Amongst original issue cases, 18% had moved from the issued address. Cases traced through the NHS were more likely to have moved from the address found through NHS tracing: 24% had moved. Where cohort members had moved, there was a much greater success in tracing original issue cases (58% were traced) than cases traced through the NHS (14%). This is unsurprising as cases traced through the NHS were ones that had been lost to the study and therefore had no valid mobile phone numbers, email addresses or stable contacts which would have helped in tracing them.

**Table 6.8: Frequency of movers by sample origin**

	<b>Original issue cases</b>	<b>Cases traced through NHS</b>	<b>Total</b>
Base: total issued sample	11,654	1,535	13,189
Non Movers	9,516	1,162	10,678
Movers	2,138	373	2,511
<i>Traced</i>	<i>1,235</i>	<i>53</i>	<i>1,288</i>
<i>Untraced</i>	<i>903</i>	<i>320</i>	<i>1,223</i>
	%	%	%
Non Movers	82	76	81
Movers	18	24	19

**Table 6.9: Tracing of movers by sample origin**

	<b>Original issue cases</b>	<b>Cases traced through NHS</b>	<b>Total</b>
Base: all movers	2,138	373	2,511
Traced movers	1,235	53	1,288
<i>Traced by interviewer</i>	<i>1,026</i>	<i>53</i>	<i>1,079</i>
<i>Traced by CLS</i>	<i>209</i>	<i>0</i>	<i>209</i>
Untraced movers	903	320	1,223
	%	%	%
Traced movers	58	14	51
<i>Traced by interviewer</i>	<i>48</i>	<i>14</i>	<i>43</i>
<i>Traced by CLS</i>	<i>10</i>	<i>0</i>	<i>8</i>
Untraced movers	42	86	49

Table 6.10 shows the outcomes for traced movers, broken down by whether these were traced by interviewers, or traced by CLS. As the table shows, where cohort members were traced by interviewers, a much higher response rate was achieved than where cohort members were traced by CLS.

**Table 6.10: Outcomes for traced movers**

	<b>Traced by interviewer</b>	<b>Traced by CLS</b>	<b>Total</b>
Base: all traced movers	1,079	209	1,288
Productive	892	116	1,008
<i>Full interview</i>	888	116	1,004
<i>Proxy interview</i>	4	0	4
Unproductive	187	93	280
<i>Non contact</i>	8	11	19
<i>Refusal</i>	139	63	202
<i>Other unproductive</i>	40	19	59
	%	%	%
Productive	83	56	78
<i>Full interview</i>	82	56	78
<i>Proxy interview</i>	<1	0	<1
Unproductive	17	44	22
<i>Non contact</i>	1	5	1
<i>Refusal</i>	13	30	16
<i>Other unproductive</i>	4	9	5

## 6.5. Response to individual survey elements

### 6.5.1. Paper self-completion questionnaires

Cohort members were sent a paper self-completion in advance of the mainstage interview. They were asked to complete this prior to their interview appointment so it could be collected by the interviewer. In a minority of cases respondents were not given the questionnaire in advance but were given it at the time of their interview and encouraged to complete it then and there if possible. Out of 9,692 productive interviews with cohort members, 8,600 paper questionnaires were completed (88.7%).

Table 6.11 shows whether questionnaires were posted or given to cohort members in advance of the interview and whether they were collected by interviewers or left with respondents to post back, broken down by whether a completed questionnaire was received or not.

Where a completed questionnaire was received, 91.7% of these were collected by interviewers and 8.3% were returned by cohort members.

Where a completed questionnaire was not received, the questionnaire had been posted or given to the cohort member before the interview in 60.5% of cases. A minority of these were collected by interviewers but went missing or turned out to be blank. In the majority of cases

(84.6%) the questionnaire was left with the respondent and was not returned (or was returned blank).

There were also 48 completed self-completion questionnaires returned for cohort members who did not complete a CAPI interview.

**Table 6.11: Completion of paper self-completion questionnaire**

	<b>Completed questionnaire received</b>	<b>Completed questionnaire not received</b>
Total	8,600	1,092
Questionnaire posted/given to cohort member before interview	7,540	661
Questionnaire completed before interview visit	7,047	125
Questionnaire completed during interview visit	842	21
Questionnaire left with cohort member to return	711	924
Cohort member refused to complete	0	22
	<b>%</b>	<b>%</b>
Questionnaire posted/given to cohort member before interview	87.7	60.5
Questionnaire collected and returned by interviewer	91.7	
<i>Completed before interview visit</i>	81.9	
<i>Completed during interview visit</i>	9.8	
Questionnaire posted back by cohort member	8.3	

Table 6.12 shows the number of paper questionnaires completed by wave.

**Table 6.12: Completion of paper questionnaire by wave**

	<b>Wave 1</b>	<b>Wave 2</b>	<b>Wave 3</b>	<b>Wave 4</b>	<b>Total</b>
Base: all full interviews	3,493	3,402	2,328	469	9,692
Completed and returned	3,114	3,044	2,067	375	8,600
Not returned	379	358	261	94	1,092
	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>
Completed and returned	89.1	89.5	88.8	80.0	88.7
Not returned	10.9	10.5	11.2	20.0	11.3

### 6.5.2. Computer assisted self-completion

Towards the end of the interview there was a CASI (Computer Assisted Self Interviewing) section which took around eight minutes to complete. In total, 99.5% of respondents were willing to do the self-completion section, 97.5% were willing to complete it by themselves and 2% were willing to complete it with help from the interviewer.

As the table shows, cohort members in wave 4 (the wave made up mostly of cases traced through the NHS) were less likely to complete the CASI section independently and more likely to require interviewer help.

**Table 6.13: Completion of CASI by wave**

	Wave 1	Wave 2	Wave 3	Wave 4	Total
Base: all personal interviews (excluding proxies)	3,493	3,402	2,328	469	9,692
Completed CASI	3,478	3,389	2,321	456	9,644
<i>Completed CASI independently</i>	3,410	3,333	2,281	431	9,455
<i>Completed CASI with interviewer help</i>	68	56	40	25	189
	%	%	%	%	%
Completed CASI	99.5	99.6	99.7	97.2	99.5
<i>Completed CASI independently</i>	97.6	98.0	98.0	91.9	97.5
<i>Completed CASI with interviewer help</i>	1.9	1.6	1.7	5.3	2.0

### 6.5.3. Vocabulary task

The vocabulary task was completed on a paper document during the CAPI interview. The cooperation rate for the vocabulary task was very high with 98.3% of cohort members completing the task according to CAPI data. A minority of completed forms were not received back though, so data is available for 96.1% of cohort members that completed an interview.

**Table 6.14: Completion of vocabulary task by wave**

	Wave 1	Wave 2	Wave 3	Wave 4	Total
Base: all full interviews	3,493	3,402	2,328	469	9,692
Task completed	3,435	3,350	2,285	453	9,523
Data received	3,334	3,315	2,218	444	9,311
	%	%	%	%	%
Task completed	98.3%	98.5%	98.2%	96.6%	98.3%
Data received	95.4%	97.4%	95.3%	94.7%	96.1%

## 6.6. Consent rates for data linkage

Cohort members who had completed a productive personal interview were asked for consent to link their survey data to information from routine health and economic records. The consent rate to link health records was slightly higher than that for economic records (71.9% compared with 67.3% for DWP linkage and 65.2% for HMRC linkage). Consent was provided to the interviewer directly in most cases, with a small proportion of respondents completing the form at a later date and returning to the office by post. A small number of cohort members contacted the office to withdraw their consent after their interview. The rates included in Table 6.15 take account of those who subsequently withdrew their consent.

**Table 6.15: Consent to data linkage – cohort members**

	<b>Wave 1</b>	<b>Wave 2</b>	<b>Wave 3</b>	<b>Wave 4</b>	<b>Total</b>
Base: all full interviews	3,493	3,402	2,328	469	9,692
NHS data linkage – consent	2,563	2,424	1,669	311	6,967
DWP data linkage – consent	2,399	2,255	1,596	274	6,524
HMRC data linkage – consent	2,331	2,191	1,537	262	6,321
	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>
<b>NHS data linkage – consent</b>	73.4	71.3	71.7	66.3	71.9
<b>DWP data linkage – consent</b>	68.7	66.3	68.6	58.4	67.3
<b>HMRC data linkage – consent</b>	66.7	64.4	66.0	55.9	65.2

Cohort members who had co-resident partners were also asked if their partners would give consent to health and economic data linkage. Overall 7,333 cohort members who completed a personal interview had co-resident partners (75.7% of productive personal interviews). Forty five per cent of partners were present at the time of the interview. Table 6.16 shows the consent rate for all co-resident partners. As for the cohort members any subsequent withdrawals have been taken account of when calculating the figures.

In total, 33.2% of co-resident partners gave consent to NHS, 31.9% to DWP and 31.4% to HMRC linkage.

**Table 6.16: Consent to data linkage – partners**

	Wave 1	Wave 2	Wave 3	Wave 4	Total
Base: all full interviews having co-resident partners	2,620	2,567	1,833	313	7,333
<i>Of which, co-resident partners present at time of interview</i>	<i>1,216</i>	<i>1,122</i>	<i>785</i>	<i>156</i>	<i>3,279</i>
NHS data linkage – consent	925	837	594	80	2,436
DWP data linkage – consent	886	809	570	71	2,336
HMRC data linkage – consent	876	801	555	71	2,303
	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>
<b>NHS data linkage – consent</b>	35.3	32.6	32.4	25.6	33.2
<b>DWP data linkage – consent</b>	33.8	31.5	31.1	22.7	31.9
<b>HMRC data linkage – consent</b>	33.4	31.2	30.3	22.7	31.4
<i>Partner present at time of interview</i>	<i>46.4</i>	<i>43.7</i>	<i>42.8</i>	<i>49.8</i>	<i>44.7</i>

## 6.7. Number of calls to achieve an interview

Interviewers were required to log all contact attempts (including posting letters, making telephone calls and making personal visits). This data has been examined to see how many contact attempts were required to achieve an interview. The mean number of visits required to achieve an interview was 5.9 whilst the modal average was 4.

**Table 6.17: Number of contact attempts to achieve an interview**

	n	%
1	422	4.4
2	615	6.3
3	1,316	13.6
4	1,910	19.7
5	1,432	14.8
6	1,032	10.6
7	744	7.7
8 or 9	976	10.1
10 to 14	864	8.9
15 or more	381	3.9
Total	9,692	

It is also possible to look at the number of visits required to achieve an interview. As can be expected given that, for most sample members, interviewers attempted to arrange appointments by telephone, this is much lower. The mean number of personal visits was 1.8 and the mode was 1.

**Table 6.18: Number of personal visits to achieve an interview**

	n	%
1	6624	68.3
2	1389	14.3
3	621	6.4
4	368	3.8
5 or more	690	7.1
Total	9,692	

## 6.8. Module timings

The overall interview length was, on average, just over an hour. The longest section was the employment and income section with an average length of 17 minutes. The table below shows the mean length of each module.

**Table 6.19: Length of modules**

<i>Base: 9674<sup>10</sup></i>	Mean time (minutes and seconds)
Grids	5:35
Family	3:23
Housing	3:43
Employment and income	17:08
Vocab task	5:21
Lifelong learning	3:36
Health	5:09
CASI	8:04
Data linkage and paper questionnaire	5:16
Contact information	4:57
Total interview length	1:02:26

<sup>10</sup> A minority of interviews were stopped and started again later, making the interview length appear artificially long. These cases have been excluded from this data.

## 7. Coding, editing and data preparation

### 7.1. Editing CAPI data

The need for editing CAPI data was minimal as the route through the questionnaire was controlled by the CAPI script, so respondents were asked all relevant questions and interviewers had to enter an answer before moving on to the next question. There were also consistency checks included in the CAPI script. This enabled interviewers to clarify and query data discrepancies directly with the respondent during the interview. Consistency errors comprise of “soft” and “hard” checks. Hard checks must be resolved by the interviewer at the time of the interview, but soft checks can be suppressed by the interviewer.

Data was checked after fieldwork to ensure that all questions that should have been answered did have a response, and questions that should not have been answered did not have a response. This checking found some responses at questions where they should not be. This was a result of ‘snapback’: where a respondent gave a particular answer at one question that caused another question to be asked, answered this second question but then changed their mind and gave a different answer to the first question which meant the second question should not have been asked. In cases such as this the second questions was edited to be ‘not applicable’.

### 7.2. Coding open-ended and ‘other specify’ questions

The CAPI interview included a number of questions where the responses were recorded verbatim and subsequently needed to be coded. These were questions where the interviewer was either unsure where to code a particular response within the existing code frame or the full range of responses could not be predicted before the interview.

Most of the questions that required coding were “other-specify” questions, where the interviewer entered an answer if they were not confident of coding into the pre-specified code frame. In many cases it was possible for these answers to be coded back into the existing code frame (back coding). However, in some cases back coding was not possible as new, distinct groups of responses emerged.

Before the data was passed on to TNS BMRB’s coding team, early data was reviewed by researchers to identify where additional codes were needed, or in the case of fully open ended questions, to create a new code frame. In some cases it was still not possible for responses to be allocated to an existing code or any of the additional codes. In these instances, coders assigned these cases to an ‘other’ code. Researchers monitored the number of cases given an ‘other’ code and reviewed them in cases where there was a high number being allocated this code.

Code frames were devised by researchers at TNS BMRB, basing them wherever possible and appropriate on code frames that had been used in previous sweeps of BCS70 and/or NCDS. CLS commented on and signed off the code frames and agreement was reached in September 2012. A list of all questions that were coded is provided in table 7.1.

**Table 7.1: List of coded variables**

Code frame	Module	Variable name
SOC	Employment and Income	JTITLE/CJTITLECUR, JDO, (CJFIRM)
		CLJTITLE/CJTITLECUR, CLJDO, (CJFIRM)
		FFRJOBTTIT/CJTITLECUR, CJDO, CJFIRM
	Proxy interview	PJTITLE, PJDO
Other specify questions (for some questions no additional codes were added and backcoding only was conducted)	Family	CHDLIVE, ACTSTAT
	Housing	HOMEGO, RENP, WHYPAR
	Employment and Income	OTHACT1, CLOTHACT1, CLJYOEND, GROU, NETP, USLP, SEOTYPE, UNEMPOY, RNOT, SJUP, HELEMP, HELEM2, POTHACT, POTHACT1, PNETOPRD, BENO, SIBX, BENP, INCCODE
	Vocabulary task	CFWHATI
	Lifelong Learning	SUBDEG
	Health	EYEPRBTP, BACKPRB, CANCTYPE, HEARPRB, SGBOTH, BKPROB
	CASI	SCRX, MENSTPO, WHYNOC
	Contact Info	SC1RELA, SC2RELA
	Proxy Interview	PROXYOTH, PXOTHACT1, PEYEPRBTP, PBACKPRB, PCANCTYPE, PHEARPRB, PSGBOTH, PBKPROB
Fully open ended	Lifelong Learning	UNIDEG
	Health	CONTBRND

Questions relating to type of occupation were coded, using Standard Occupational Classification (SOC2010).

### **7.3. Editing paper questionnaire data**

The self-completion paper questionnaire data, was scanned in by TNS BMRB's data capture team. The self-completion questionnaire contained two 'other specify' questions Q6 and Q7. Where respondents entered a verbatim answer here TNS BMRB's coding team captured these responses manually and coded them up in the same way as the CAPI questions. Once the data had been captured the data was checked in a similar way to the CAPI data. Editing was conducted by TNS BMRB's data processing team. Editing conducted included editing out instances where cohort members had ticked more than one response to a question where only one response was required, and editing out instances where a cohort member had entered an invalid response to one of the numeric questions Q26 or Q38.

The vocabulary task answer sheets were processed by TNS BMRB's data capture and data processing team in a similar way to the paper questionnaire data. Syntax was written to calculate a score for the cohort member. Where cohort members had left a question blank or multi-coded a question this was considered an incorrect answer.

### **7.4. Combining dress rehearsal data with main stage data**

Although very little editing was undertaken on main stage survey data, some editing of the dress rehearsal data was required in order to merge it with the main data. This was due to changes being made to the questionnaire between the dress rehearsal and main fieldwork. Changes included:

- Minor wording changes to questions;
- More significant changes to questions that changed the meaning;
- Changing the precoded answer options;
- Moving questions from the paper questionnaire to the CAPI interview (or CASI section) and vice versa;
- Questions added or deleted.

Where questions were semantically the same (even if small changes had been made) then the data was merged. If questions had changed in meaning though, or response options had changed then the data could not be merged and a dress rehearsal version of the question was included in the combined dataset.

The editing of dress rehearsal data was therefore mostly concerned with adding relevant questions from the dress rehearsal paper questionnaire data to the CAPI dataset and vice versa. Some of the questions that were moved from the paper questionnaire to the CASI section were only asked of people with a job and some were only asked of people with a partner. The dress rehearsal paper data was edited to ensure that these questions had a response (including 'refused') if the CAPI data showed that the question should have been answered, and did not have a response if the CAPI data showed that the question should not have been answered.

Where a question was removed from the questionnaire after the dress rehearsal, the dress rehearsal data has not been included in the dataset.

### **7.5. Problems with the CAPI data**

The data that was delivered to CLS was of high quality. However during the checking process a few problems were identified:

- PARHC should have been asked of all respondents who had a parent or parent in law alive and also had children aged under 16 living in the household. Due to a routing error this was missed for 87 respondents (1.4% of those that should have been asked the question).
- CJSUP (derived version) should have a value for all respondents that were employees. Due to a routing error this was missed for 203 respondents (2.9% of those that should have been asked the question).
- CJSEEMPS (derived version) should have a value for all respondents that were self employed. Due to a routing error this was missed for 39 respondents (2.8% of those that should have been asked the question).
- PJDO should have been asked of all respondents whose partner was working. Due to a routing error this was missed for 168 respondents (2.6% of those that should have been asked the question).
- MENS12M was missed for one respondent, due to a routing error.
- Due to a problem with transmitting feedforward data, 11 interviews were conducted without using feedforward data.

All affected responses were coded as missing values during data editing. Cohort Members were not re-contacted.

## 7.6. Survey outputs

**Table 7.2: Survey outputs**

Output	Date delivered	Notes
<b>CAPI data</b>		CAPI data was supplied as a number of files: a flat file and six hierarchical files. Several iterations of the interim CAPI data were supplied until the format was fully agreed with CLS.
Interim data	6 <sup>th</sup> November 2012	
Final data	31 <sup>st</sup> July 2013	
<b>Paper self-completion</b>		
Final data	16 <sup>th</sup> August 2013	
<b>Vocabulary task</b>		
Final data	16 <sup>th</sup> August 2013	
<b>Contact information</b>		Contact information files for productive cases were sent to CLS monthly during fieldwork with the final file being sent a month after fieldwork had finished. All unproductive cases were included in a final contact info file in May 2013.
First file	13 <sup>th</sup> June 2012	
Final files	31 <sup>st</sup> May 2013	
<b>Paradata</b>		Hierarchical paradata showed all contact attempts made by interviewers for each respondent, with each contact attempt being a line of data. The flat file contained case level information, including final outcome.
Flat paradata	9 <sup>th</sup> September 2013	
Hierarchical paradata	9 <sup>th</sup> September 2013	

# Appendices

**Advance letter (for people that took part at the last sweep)**

[CMTitle] [CM first name] [CM surname]

[Address line 1]

[Address line 2]

[Address line 3]

[Address line 4]

[Postcode]

Personal ref: [cserial]

Survey ref: 224342

May 2012

**1970 British Cohort Study – Age 42 Survey**

Dear [CM first name],

I am writing to let you know that the next stage of the 1970 British Cohort Study is now underway. I hope you will wish to take part. **Your continued support and involvement is vital to the success of the study and is greatly appreciated.**

We have enclosed a leaflet which provides information about this year's survey and explains exactly what taking part will involve.

The Age 42 survey is being carried out by TNS-BMRB, an independent research organisation.

The interviewer named below will be in touch in the next couple of weeks to invite you to take part and, if you are willing, they will arrange a convenient time to visit you. You can also get in touch with them directly to arrange an appointment. Their phone number is at the bottom of this letter.

If you have any questions about the study please call TNS-BMRB on 0800 015 0302 or email [bc70@tns-bmr.co.uk](mailto:bc70@tns-bmr.co.uk). If this letter has reached you at a different address to the one printed above please let TNS-BMRB know your new address.

**We hope you enjoy taking part in the study this time around.**

Your interviewer will be \_\_\_\_\_

Contact number \_\_\_\_\_

Yours sincerely,

Dr. Alice Sullivan  
BCS70 Director

## **Advance letter (for people that refused at the last sweep)**

[CM Title] [CM first name] [CM surname]

[Address line 1]

[Address line 2]

[Address line 3]

[Address line 4]

[Postcode]

Personal ref: [cserial]

Survey ref: 224342

May 2012

### **1970 British Cohort Study – Age 42 Survey**

Dear [CM first name],

I am writing to let you know that the next stage of the 1970 British Cohort Study is now underway. I hope you will wish to take part.

The last stage of the study was conducted in 2008 and we understand that you chose not to take part at that time. Each study member has a unique story to tell so we would very much like to talk to you this year.

We have enclosed a leaflet which provides information about this year's survey and explains exactly what taking part will involve.

This latest stage of the study is being carried out by TNS-BMRB, an independent research organisation.

The interviewer named below will be in touch in the next couple of weeks to invite you to take part and, if you are willing, they will arrange a convenient time to visit you. You can also get in touch with them directly to arrange an appointment. Their phone number is at the bottom of this letter.

If you have any questions about the study please call TNS-BMRB on 0800 0150 302 or email [bcs70@tns-bmr.co.uk](mailto:bcs70@tns-bmr.co.uk). If this letter has reached you at a different address to the one printed above please let TNS-BMRB know your new address.

**We hope you enjoy taking part in the study this time around. Your continued support and involvement is vital to the success of the study and is greatly appreciated.**

Your interviewer will be \_\_\_\_\_

Contact number \_\_\_\_\_

Yours sincerely,

Dr. Alice Sullivan  
BCS70 Director

**Advance letter (for people that could not be contacted at the last sweep)**

[CM Title] [CM first name] [CM surname]

[Address line 1]

[Address line 2]

[Address line 3]

[Address line 4]

[Postcode]

Personal ref: [cserial]

Survey ref: 224342

May 2012

**1970 British Cohort Study – Age 42 Survey**

Dear [CM first name],

I am writing to let you know that the next stage of the 1970 British Cohort Study is now underway. I hope you will wish to take part.

The last stage of the study was conducted in 2008 but unfortunately we were unable to contact you at that time. Each study member has a unique story to tell so we would very much like to talk to you this year.

We have enclosed a leaflet which provides information about this year's survey and explains exactly what taking part will involve.

This latest stage of the study is being carried out by TNS-BMRB, an independent research organisation.

The interviewer named below will be in touch in the next couple of weeks to invite you to take part and, if you are willing, they will arrange a convenient time to visit you. You can also get in touch with them directly to arrange an appointment. Their phone number is at the bottom of this letter.

If you have any questions about the study please call TNS-BMRB on 0800 0150 302 or email [bcs70@tns-bmr.co.uk](mailto:bcs70@tns-bmr.co.uk). If this letter has reached you at a different address to the one printed above please let TNS-BMRB know your new address.

**We hope you enjoy taking part in the study this time around. Your continued support and involvement is vital to the success of the study and is greatly appreciated.**

Your interviewer will be \_\_\_\_\_

Contact number \_\_\_\_\_

Yours sincerely,

Dr. Alice Sullivan  
BCS70 Director

## Leaflet with advance letter

### 1970 BRITISH COHORT STUDY

#### What will happen to the information I give you?

The information you provide will be treated in strict confidence in accordance with the Data Protection Act, and used for statistical research purposes only. This means that:

- Names and addresses are never included with the results of our research studies
- Neither households nor individuals are identified in any published report

#### When will we be coming back?

We hope you will continue to be part of the study for many years to come. It is currently planned that future surveys will take place every four years, so the next survey is likely to take place in 2016 when you will be 46.



### 1970 BRITISH COHORT STUDY

#### How can I find out more about the Age 42 Survey?

If you would like more information about the Age 42 survey please contact TNS-BMRB:

Freephone: 0800 015 0302  
Email: [bcs70@tns-bmr.co.uk](mailto:bcs70@tns-bmr.co.uk)

For further information about BCS70 in general you can contact the Centre for Longitudinal Studies on Freephone 0500 600 616, email [bcs70@ioe.ac.uk](mailto:bcs70@ioe.ac.uk) or visit the study website: [www.bcs70.info](http://www.bcs70.info).

#### Who can I contact for further advice?

If you would like any advice on any of the issues included in the interview then the Citizen's Advice Bureau ([www.adviceguide.org.uk](http://www.adviceguide.org.uk)) or Supportline ([www.supportline.org.uk](http://www.supportline.org.uk) or 01708 765200) will be able to help.



### 1970 BRITISH COHORT STUDY



#### AGE 42 SURVEY



#### INFORMATION LEAFLET

TNS

## 1970 BRITISH COHORT STUDY

### Why is the 1970 British Cohort Study (BCS70) important?

BCS70 has been following the lives of over 17,000 people, who were all born in the same week as you, since 1970.

Now that you are 42, and entering a new phase of life, the information that you have shared with us over the years allows us to understand where you are now and how you got there. There is no other study that focuses on your generation, and the factors that have influenced your journey through life.

BCS70 continues to help scientists and researchers understand changes in society and transitions which occur in people's lives. At this time of recession in particular, the information you provide can help policymakers and providers of services to plan for the future and improve the lives of people in Britain.

Findings from the study have had, and will continue to have, a significant impact on government policy and service provision across a whole range of spheres including health, education and employment.



### What will the Age 42 Survey involve?

The Age 42 Survey has two parts: a short paper questionnaire and a face-to-face interview.

The paper questionnaire will be posted to you in advance of the interviewer's visit. It should take around 20 minutes to complete. We would be grateful if you could fill it out before your interview so the interviewer can collect it when they visit.

Some of the topics covered in the paper questionnaire are:

- Leisure activities
- Values and attitudes
- Religion

The main interview will last around an hour. Some of the topics that will be covered in the main interview are:

- Your family situation
- Your housing situation
- Your employment
- Your income
- Your health

If you live with a partner, there will be some questions about your partner too, so please check that he/she is happy for you to answer them.

As always your participation is entirely voluntary and you can miss any question you do not want to answer. For some questions, which might be more private, you will fill in the answers yourself on the interviewer's laptop.

### What other information would we like to collect?

We would like to collect some additional information about you (and your partner) from routine records held by the National Health Service (NHS), Her Majesty's Revenue and Customs (HMRC) and the Department of Work and Pensions (DWP). We can only do this with your permission. The interviewer will provide you with more information about this. You do not have to give us permission to do this, and we will not be able to access this information without your permission.

### Who is carrying out the study?

The study is run by the Centre for Longitudinal Studies (CLS), a research centre in the Institute of Education at the University of London. It is being funded by the government's Economic and Social Research Council.

The Age 42 survey is being carried out by TNS-BMRB, an independent research company that specialises in conducting large-scale social surveys.

## Tracing letter

Personal Ref: \_\_\_\_\_

Ref: 224342/TRACE

Date: \_\_\_\_\_

### 1970 British Cohort Study – Age 42 Survey

Dear \_\_\_\_\_,

I am writing to let you know that the next stage of the 1970 British Cohort Study is now underway. I hope you will wish to take part.

An interviewer working on behalf of our partner organisation, TNS-BMRB has visited the address we have on our files for you and found that you now live elsewhere. The interviewer spoke to

\_\_\_\_\_ who did not wish to give your new address without your permission, but did agree to forward this letter to you. I would be most grateful if you would let TNS-BMRB know your present address, wherever you are living now. Please call TNS-BMRB on **0800 015 0302**. Alternatively, you can complete the reply slip at the bottom of this letter and return it in the FREEPOST envelope provided to **Freepost RRAJ-CRTK-JEJA, Cohort, Kantar Operations, Ealing Gateway, 26-30 Uxbridge Road, London, W5 2AU** – you won't need a stamp if you post it in the UK.

By giving us your address you are not committing yourself to be interviewed. Once you have confirmed your new details you will be contacted by an interviewer who will provide you with information about this year's survey and invite you to take part. If you are willing they will arrange a convenient time to visit you.

If you have any further queries about the study please do not hesitate to contact TNS-BMRB on the freephone number above or email [bc70@tns-bmrb.co.uk](mailto:bc70@tns-bmrb.co.uk).

**Thank you very much for your help.**

Yours sincerely,

Dr. Alice Sullivan, BCS70 Director

✂ \_\_\_\_\_

Personal ref: .....

*Please complete this form using BLOCK CAPITALS and return in the FREEPOST envelope*

Title.....First name.....Surname.....

Address.....

.....

Postcode.....

Telephone (including area code).....

Email.....

## Stable contact tracing letter

Personal Ref: \_\_\_\_\_

Ref: 224342/STABC

Date: \_\_\_\_\_

Dear \_\_\_\_\_,

The 1970 British Cohort Study is major national study following the lives of over 17,000 individuals born in 1970. We are trying to make contact with the person named below so that we can invite them to take part in the latest stage of the study which is currently taking place.

Name: .....

An interviewer working on behalf of TNS-BMRB, an independent research organisation, who are conducting the interviews, has visited the address we have on our files for them and found that they now live elsewhere. This person has previously given us your details and permission to contact you if they changed address, in order to try to find out where they have moved to.

If you know where they are living, please let TNS-BMRB know their address. You can do so by calling TNS-BMRB on Freephone **0800 015 0302**, emailing [bcs70@tns-bmr.co.uk](mailto:bcs70@tns-bmr.co.uk) or returning the enclosed form in the FREEPOST envelope provided to **Freepost RRAJ-CRTK-JEJA, Cohort, Kantar Operations, Ealing Gateway, 26-30 Uxbridge Road, London, W5 2AU** - you won't need a stamp if you post it in the UK.

By telling us their address, you are not committing them to taking part again. They will be able to decide this for themselves when we get in touch with them.

If you know their address but would prefer to pass this letter on to the study member and ask them to return it to us themselves, please do so. If the study member has any questions about the study, or would prefer not to be contacted again, please ask them to let us know.

**Thank you for your help.**

Yours sincerely,

Dr. Alice Sullivan  
BCS70 Director

✂ \_\_\_\_\_  
Personal ref: .....

*Please complete this form using BLOCK CAPITALS and return in the FREEPOST envelope*

Title.....First name.....Surname.....

Address.....

.....

Postcode.....

Telephone.....

Email.....

## Occupier letter

Personal Ref \_\_\_\_\_

Ref: 224342/OCCUP

Date: \_\_\_\_\_

Dear Sir/ Madam,

We are trying to make contact with the person named below who has taken part over many years in an important research study. According to our records they are living at this address. An interviewer working on behalf of TNS-BMRB, an independent research organisation, has visited the address several times but has been unable to find anyone at home.

**If you are the person**, please let us know that you are still living here and we will ask the interviewer to try and make contact with you again. If this letter has been forwarded to you from a different address, please let us have the full details of your current address.

**If you are not the person who took part in the study**, can you help by forwarding this letter to them; or by giving us details of their new address, or the name and address of someone who can?

**If you do not know of any way of getting in touch with this person**, please let us know so that we can avoid bothering you again.

Please complete the reply slip below and return it to TNS-BMRB in the enclosed FREEPOST envelope to **Freepost RRAJ-CRTK-JEJA, Cohort, Kantar Operations, Ealing Gateway, 26-30 Uxbridge Road, London, W5 2AU** – you won't need a stamp if you post it in the UK. If you prefer you can telephone TNS-BMRB on 0800 015 0302 or email at cohort@tns-bmr.co.uk.

**Thank you for your help.**

Yours faithfully,

Dr. Alice Sullivan, Study Director

 .....

**We are trying to contact:**.....**Personal Ref:**.....

**Please tick the appropriate box below, and fill in the details over the page**

- |    |  |                          |
|----|--|--------------------------|
| A. | I am the person named above.....   | <input type="checkbox"/> |
| B. | I am not the person named above, but I know a forwarding address for them.....   | <input type="checkbox"/> |
| C. | I am not the person named above, but I know someone who may be able to help..... | <input type="checkbox"/> |
| D. | I do not know the whereabouts of the person named above.....                     | <input type="checkbox"/> |

**THE INFORMATION YOU GIVE WILL BE TREATED IN STRICTEST CONFIDENCE**

## Appointment letter

[CM Title] [CM first name] [CM surname]

[Address line 1]

[Address line 2]

[Address line 3]

[Address line 4]

[Postcode]

Personal Ref: [cserial]

Survey Ref: 224342

Date: \_\_\_\_\_

### 1970 British Cohort Study- Age 42 Survey

Dear [CM first name],

Thank you for agreeing to take part in the next stage of the 1970 British Cohort Study.

Your interview appointment is at: \_\_\_\_\_ on \_\_\_\_\_

The interviewer will be: \_\_\_\_\_ Contact number \_\_\_\_\_

If you need to re-arrange the appointment, then please contact your interviewer on the number above to arrange this. Alternatively you can contact TNS-BMRB on 0800 015 0302 or email [bcs70@tns-bmrb.co.uk](mailto:bcs70@tns-bmrb.co.uk).

We have enclosed a paper questionnaire which we would be very grateful if you would complete before the interviewer visits. Please read the instructions on the front of the booklet carefully before completing it. Once completed please seal in the envelope provided and the interviewer will collect it when they visit. If you have any difficulty reading or answering the questions please let the interviewer know when they come to visit you and they will be able to help you.

As always your answers will be used for research purposes only and will be treated in strict confidence in accordance with the Data Protection Act.

**We hope you enjoy this year's survey. Your continued support and participation is greatly appreciated. Many thanks for your help.**

Yours sincerely,

Dr. Alice Sullivan  
BCS70 Director

# 1970 BRITISH COHORT STUDY

## COHORT MEMBER CONSENT FORM

**Forename (print)**

**Surname (print)**

Please complete this form to indicate whether or not you give us permission to pass your personal details to each organisation so that your records can be identified and sent to us to be linked with your responses to the study.

### National Health Service (NHS) records

I give my permission for my name, address, sex and date of birth to be passed to the NHS for this purpose.

Please tick one of the boxes to indicate whether or not you give permission.

Yes

No

☐

☐

### Department for Work and Pensions (DWP) records

I give my permission for my name, address, sex and date of birth to be passed to the DWP for this purpose.

Please tick one of the boxes to indicate whether or not you give permission.

Yes

No

☐

☐

### Her Majesty's Revenue and Customs (HMRC)

I give my permission for my name, address, sex and date of birth to be passed to the HMRC for this purpose.

Please tick one of the boxes to indicate whether or not you give permission.

Yes

No

☐

☐

### National Insurance Number

Please write your National Insurance Number below if you are willing for us to send this to the DWP and the HMRC. This will be used to help identify your records.

National Insurance Number:

--	--	--	--	--	--	--	--	--	--

### Confirmation

I have read or been read the 'What other information would we like to collect?' leaflet and have had the opportunity to ask questions. I understand that the information released will be treated in strict confidence in accordance with the Data Protection Act and used for research purposes only. I understand that this consent will remain valid and ongoing unless revoked by me. I understand that I may withdraw my consent at any time by contacting the British Cohort Study team, without giving any reasons.

The study team can be contacted at 1970 British Cohort Study, FREEPOST, KE7770, LONDON, WC1H 0BR (no stamp required if posted in the UK), Freephone 0500 600 616 or [bcs70@joe.ac.uk](mailto:bcs70@joe.ac.uk).

**Signature**

**Date**

FOR INTERVIEWER USE ONLY - ENTER COHORT MEMBER DETAILS

--	--	--	--	--	--	--	--

Serial number

☐

Male

☐

Female

--	--	--	--	--	--

Date of Birth

224342

# 1970 BRITISH COHORT STUDY

## PARTNER CONSENT FORM

### PRINT IN BLOCK CAPITALS

Forename

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Surname

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Please complete this form to indicate whether or not you give us permission to pass your personal details to each organisation so that your records can be identified and sent to us to be linked with your partner's responses to the study.

### National Health Service (NHS) records

I give my permission for my name, address, sex and date of birth to be passed to the NHS for this purpose.

Please tick one of the boxes to indicate whether or not you give permission.

Yes

No

☐

☐

### Department for Work and Pensions (DWP) records

I give my permission for my name, address, sex and date of birth to be passed to the DWP for this purpose.

Please tick one of the boxes to indicate whether or not you give permission.

Yes

No

☐

☐

### Her Majesty's Revenue and Customs (HMRC)

I give my permission for my name, address, sex and date of birth to be passed to the HMRC for this purpose.

Please tick one of the boxes to indicate whether or not you give permission.

Yes

No

☐

☐

### National Insurance Number

Please write your National Insurance Number below if you are willing for us to send this to the DWP and the HMRC. This will be used to help identify your records.

National Insurance Number:

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

### Confirmation

I have read or been read the 'What other information would we like to collect' leaflet and have had the opportunity to ask questions. I understand that the information released will be treated in strict confidence in accordance with the Data Protection Act and used for research purposes only. I understand that this consent will remain valid and ongoing unless revoked by me. I understand that I may withdraw my consent at any time by contacting the British Cohort Study team, without giving any reasons.

The study team can be contacted at 1970 British Cohort Study, FREEPOST, KE7770, LONDON, WC1H 0BR (no stamp required if posted in the UK), Freephone 0800 600 616 or [bcs70@ioe.ac.uk](mailto:bcs70@ioe.ac.uk).

Signature

Date

### FOR INTERVIEWER USE ONLY - ENTER COHORT MEMBER DETAILS

--	--	--	--	--	--	--	--	--	--

Serial number

☐

Male

☐

Female

--	--	--	--	--	--	--	--

Date of Birth

224342

## Data linkage leaflet

### 1970 BRITISH COHORT STUDY

#### What will the information be used for and who will use it?

- Like your study responses, the additional information would be used by professional academic and social policy researchers for non-commercial research and statistics.
- Any sensitive information would only be made available to them under restricted access arrangements which make sure that the information is used responsibly and safely.
- Names and addresses are never included in the results and no individual can be identified from the research.
- The data will not be used to work out whether any individual is claiming benefits they should not be or is not paying the right amount of tax. Giving permission will not affect any current or future claims for benefits.
- Additional details about how this information will be used can be found on the study website: [www.bcs70.info](http://www.bcs70.info)

#### What if I change my mind?

You can withdraw permission at any time for your NHS, DWP or HMRC records to be added to your study answers. If you do this, you can still continue to participate in the study.

#### Who do I contact?

If you want any further information or want to withdraw your permission please contact us by writing to:

1970 British Cohort Study  
FREEPOST KE7770  
LONDON  
WC1H 0BR

*(no stamp required if posted in the UK)*

The study team can also be contacted on

Freephone: 0500 600 616

Email: [bc70@ioe.ac.uk](mailto:bc70@ioe.ac.uk)

### 1970 BRITISH COHORT STUDY



#### AGE 42 SURVEY

#### WHAT OTHER INFORMATION WOULD WE LIKE TO COLLECT?



Information routinely collected by government departments can help us understand much more about your experiences and how to support individuals and families if linked to the answers you have given us. We will ask you (and your partner) for permission to link your data in this way.

## 1970 BRITISH COHORT STUDY

### What am I being asked to give my permission for?

#### National Health Service (NHS) records

The NHS maintains information on all patients accessing health services through routine medical and other health-related records. These records are held within statistical health databases which record information about:

- Admissions or attendances at hospital (including dates of admission, discharge or attendance, diagnoses received, treatments given, surgical procedures)
- Visits to your family doctor or other health professional e.g. midwife
- Records of specific conditions such as cancer or diabetes
- Prescriptions given

Adding your NHS records will allow researchers to examine both the lifestyle factors associated with the onset of particular illnesses and the ways in which illnesses have an impact on other aspects of people's lives.

#### Department for Work and Pensions (DWP) records

The DWP keeps records of everybody's benefit claims and any periods people spend on employment programs. Adding your DWP records will help us get a better picture of those who are claiming benefits and how they can best be helped.

#### Her Majesty's Revenue and Customs (HMRC) records

HMRC keep records of everybody's employment, earnings, tax credits and occupational pensions (since 1998) and National Insurance Contributions since the early 1970s. These records will tell us a great deal about your economic situation – at present, in the past and in the future. This will allow researchers to examine how economic circumstances impact upon other aspects of life in greater detail.

### Why are you asking for my partner's records?

The circumstances of those around you have a big effect on you. If, for example, your partner were to become seriously ill, or were to experience a prolonged period of unemployment this could clearly have a hugely significant impact on your life. We are only able to collect a very limited amount of information about your partner when we interview you, so adding their records will give us a much better understanding of your family circumstances.

### What will happen if I give permission?

- 1) BCS70 will give your name, address and date of birth to the NHS, DWP and HMRC. Your national insurance number will be provided to the DWP and HMRC (if you provide it).
- 2) The DWP, HMRC and NHS will use these details to identify the correct records it holds about you.
- 3) The DWP, HMRC and NHS will send your records to BCS70.
- 4) The DWP, HMRC and NHS will not retain the information sent to them.
- 5) BCS70 will add the DWP, HMRC and NHS records to your study responses
- 6) Your personal information (e.g. name and address) will be removed before any research is done.

If your partner gives permission the same process will occur and their records will be added to your study responses.

### What if I don't want to give my permission?

If you don't want to do this you can still take part in the rest of the survey.

## Data linkage partner letter

Ref:224342/DLPART

Dear \_\_\_\_\_

Your partner is a member of the 1970 British Cohort Study (BCS70), which is following the lives of over 17,000 people who were born in the same week in 1970. The study seeks to understand how different aspects of people's lives such as health, wealth, education, family circumstances and employment are inter-linked and how experiences during one stage of life can affect achievements in later life.

Findings from the study have had a significant impact on government policy and service provision across a whole range of areas including health, education and employment.

As part of the Age 42 survey we asked your partner if they would allow us to collect some additional information from routine records held by the National Health Service (NHS), the Department for Work and Pensions (DWP) and Her Majesty's Revenue and Customs (HMRC). This would give us a much more detailed picture of their health and economic circumstances.

We would also like to collect information from these records about you. Your experiences have a huge impact on your partner. If, for example, you were to become seriously ill, or were to experience a long period of unemployment this could clearly have a very significant effect on their life. When we interviewed your partner we did ask a very limited number of questions about you. However, the information held in these records would give us a much better understanding of your circumstances and how these could affect your partner.

We can only do this with your permission. You do not have to give this permission and we will not be able to access your records without your permission.

We have enclosed a leaflet which explains more about the information we would like to collect and what will happen if you do decide to give BCS70 permission. Further information is also available on the study website: [www.bcs70.info](http://www.bcs70.info). We have also enclosed a consent form.

We would be extremely grateful if you could read the leaflet, complete the consent form and return it to us in the enclosed Freepost envelope. Even if you do not wish to give us this permission, we would still be very grateful if you would return the completed form.

If you would like any further information before you make up your mind you can contact us in any of the following ways:

- Write to 1970 British Cohort Study, FREEPOST, KE7770, LONDON, WC1H 0BR (no stamp required if posted in the UK)
- Freephone: **0500 600 616**
- Email: **bc70@ioe.ac.uk**.

Best wishes

Dr. Alice Sullivan, BCS70 Study Director

## Vocabulary task instructions

### 1970 BRITISH COHORT STUDY



#### VOCABULARY TASK INSTRUCTIONS

##### PLEASE READ THESE INSTRUCTIONS

The purpose of this task is to see if you know the meaning of certain words.

Please look at the example below.

You will see that the first word is printed in CAPITAL LETTERS. After it there are five other words. One of these words means the same or nearly the same as the word printed in capital letters. You have to decide which word it is then put a cross [X] in the box to the right of that word. Please complete the form in **black or blue ink**, keeping your answers within the boxes.

##### Example

CHAIR                      poor ☐                      step ☐                      seat ☒                      thick ☐                      mat ☐

Which of the words means the same, or nearly the same, as CHAIR?

The correct answer is "seat" so a cross has been put in box to the right of "seat".

In the task there are 20 questions. The questions get more and more difficult. Try to do as many of them as you can. If you're not sure or don't know the answer to a question you can guess or leave it blank and move on to the next one.

The task is completed on a paper sheet which the interviewer will give you in a moment.

You will have **4 minutes** to do this task. The computer will tell you when you have one minute left and when the time is up. If you finish before then, you can go back over your answers to check them.

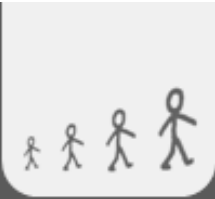
If you make a mistake or change your mind please completely fill the box to show the mistake [■] and then cross the correct answer.

**PLEASE TELL THE INTERVIEWER WHEN YOU HAVE FINISHED READING THESE INSTRUCTIONS. IF YOU HAVE ANY QUESTIONS ABOUT HOW TO COMPLETE THE TASK PLEASE ASK THE INTERVIEWER.**

224342

Vocabulary task question and answer form

1970 BRITISH  
COHORT STUDY



VOCABULARY TASK QUESTION AND ANSWER FORM

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224342

Please turn over for the vocabulary task.

INTERVIEWER TO ENTER

Serial number

Sampling point/site code

Interviewer number

Respondent first name

☐ Male

☐ Female

Date of Birth

+

+

+

1. QUICK	always <input type="checkbox"/>	best <input type="checkbox"/>	neat <input type="checkbox"/>	sick <input type="checkbox"/>	fast <input type="checkbox"/>
2. TIDINGS	steps <input type="checkbox"/>	reason <input type="checkbox"/>	jetty <input type="checkbox"/>	mountains <input type="checkbox"/>	news <input type="checkbox"/>
3. CONCEAL	advise <input type="checkbox"/>	hide <input type="checkbox"/>	gather <input type="checkbox"/>	freeze <input type="checkbox"/>	conciliate <input type="checkbox"/>
4. UNIQUE	several <input type="checkbox"/>	matchless <input type="checkbox"/>	simple <input type="checkbox"/>	ancient <input type="checkbox"/>	absurd <input type="checkbox"/>
5. DUBIOUS	tawny <input type="checkbox"/>	obstinate <input type="checkbox"/>	gloomy <input type="checkbox"/>	muddy <input type="checkbox"/>	doubtful <input type="checkbox"/>
6. TRIVIAL	trefoil <input type="checkbox"/>	alluvial <input type="checkbox"/>	trifling <input type="checkbox"/>	eccentric <input type="checkbox"/>	tawdry <input type="checkbox"/>
7. ORTHODOX	conventional <input type="checkbox"/>	angular <input type="checkbox"/>	bohemian <input type="checkbox"/>	liturgical <input type="checkbox"/>	amazing <input type="checkbox"/>
8. PLAUSIBLE	aggressive <input type="checkbox"/>	humane <input type="checkbox"/>	shallow <input type="checkbox"/>	wide <input type="checkbox"/>	credible <input type="checkbox"/>
9. SIGNIFY	deter <input type="checkbox"/>	subscribe <input type="checkbox"/>	avail <input type="checkbox"/>	submit <input type="checkbox"/>	denote <input type="checkbox"/>
10. CONSPICUOUS	plotting <input type="checkbox"/>	gargantuan <input type="checkbox"/>	suspicious <input type="checkbox"/>	prominent <input type="checkbox"/>	deserved <input type="checkbox"/>
11. PRECEDENCE	guess <input type="checkbox"/>	priority <input type="checkbox"/>	cleverness <input type="checkbox"/>	sympathy <input type="checkbox"/>	regalia <input type="checkbox"/>
12. IMPLICATE	ingest <input type="checkbox"/>	involve <input type="checkbox"/>	produce <input type="checkbox"/>	malformed <input type="checkbox"/>	deviate <input type="checkbox"/>
13. INDIFFERENT	similar <input type="checkbox"/>	disillusioned <input type="checkbox"/>	inequitable <input type="checkbox"/>	identical <input type="checkbox"/>	uninterested <input type="checkbox"/>
14. CREDULOUS	apt <input type="checkbox"/>	genuine <input type="checkbox"/>	opposed <input type="checkbox"/>	gullible <input type="checkbox"/>	trustworthy <input type="checkbox"/>
15. SEETHE	soften <input type="checkbox"/>	mow <input type="checkbox"/>	boil <input type="checkbox"/>	surround <input type="checkbox"/>	perceive <input type="checkbox"/>
16. OBSOLETE	execrable <input type="checkbox"/>	secret <input type="checkbox"/>	innocuous <input type="checkbox"/>	rigid <input type="checkbox"/>	redundant <input type="checkbox"/>
17. ERUDITE	learned <input type="checkbox"/>	spasmodic <input type="checkbox"/>	superfluous <input type="checkbox"/>	pathetic <input type="checkbox"/>	spurious <input type="checkbox"/>
18. PROSAIC	commonplace <input type="checkbox"/>	flowery <input type="checkbox"/>	laudable <input type="checkbox"/>	poetical <input type="checkbox"/>	spacious <input type="checkbox"/>
19. ASCETIC	artistic <input type="checkbox"/>	dissolute <input type="checkbox"/>	austere <input type="checkbox"/>	antipathetic <input type="checkbox"/>	charlatan <input type="checkbox"/>
20. PUSILLANIMOUS	loud <input type="checkbox"/>	living <input type="checkbox"/>	timid <input type="checkbox"/>	averse <input type="checkbox"/>	correct <input type="checkbox"/>

+

+

## Change of address card



## 1970 British Cohort Study Change of Address Card

### Your details:

Please complete using BLOCK CAPITALS

Personal ref: <i>(printed on all correspondence from the study)</i>
Title:
First name:
Surname:
Date of Birth (DD/MM/YY):

---

Address to which you will be moving:	
Postcode:	
Home tel. no.:	Mobile tel. no.:
Email address:	
Date of move:	

Once complete please moisten edges, fold on the dotted line, seal and return-  
**no stamp is needed.** If this is not convenient, or if you have any questions,  
please contact us on Freephone: 0500 600616 or email [bcs70@ioe.ac.uk](mailto:bcs70@ioe.ac.uk).

## Thank you letter

[CM Title] [CM first name] [CM surname]

[Address line 1]

[Address line 2]

[Address line 3]

[Address line 4]

[Postcode]

Personal Ref: [cserial]

Survey Ref: 224342

[Date]

### 1970 British Cohort Study- Age 42 Survey

Dear [CM first name],

We would like to thank you for taking part in the latest stage of the 1970 British Cohort Study. Your continued support and participation in the study is much appreciated. We hope you enjoyed this year's survey. It is currently planned that the next survey will take place in 2016 when you will be 46.

The information that you and other study members have provided over the years is used by researchers to answer questions about health, education, employment, well-being and other aspects of society. This research enables policy-makers to develop services that have a positive impact on the lives of everyone in Britain. As always, everything you tell us will be treated in the strictest confidence. You will never be identified in any reports or publications.

If your contact details change please let us know by returning the change of address card the interviewer left with you to **1970 British Cohort Study, FREEPOST KE7770, London, WC1H 0BR**. You will not need a stamp if you post it in the UK. If you prefer, you can telephone us on **Freephone 0500 600 616** or email [\*\*bcs70@ioe.ac.uk\*\*](mailto:bcs70@ioe.ac.uk).

If you have any questions or would like any further information, please do not hesitate to contact us on the above number. You can also find more information about the study on the British Cohort Study members' web site ([www.bcs70.info](http://www.bcs70.info)).

We are very grateful for the time you have given to the study so far and hope you will continue to be part of the study for many years to come.

Yours sincerely,

Dr. Alice Sullivan  
BCS70 Director