

- Technical Report-
2017 Health, Work and Retirement (HWR) study
Life Course History Telephone Interview project

Version 1

April 2018

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Background

The Health, Work and Retirement Study Life Course History (LCH) project is an initiative of Massey University's Health and Ageing Research Team. Life course history interviews elicit and record information about a range of factors which may impact on health and wellbeing during the life course. Such structured life course history interviews have been developed for other studies of ageing, including the English *Longitudinal Study on Ageing (ELSA)*, which administered interviews face to face, and the Australian *45 and Up Study*, which administered interviews over the telephone. LCH interviews are conducted to identify lifetime determinants of health and wellbeing in later life. Lifetime determinants may include early living standards, adult life decisions and behaviours, and the implementation of certain social policies.

Interview participants were drawn from participants in the New Zealand Health, Work and Retirement survey who were recruited to the study in 2006. At its core, the Health, Work and Retirement study is a biennial longitudinal survey of persons randomly sampled from persons aged 55 and over from the New Zealand electoral roll. Some of those invited to participate in the LCH interviews have previously participated in other aspects of the Health, Work and Retirement study, including qualitative interviews in 2008, face-to-face cognitive interviews in 2010 and 2012, and provision of consent to link to their national health record data held by the Ministry of Health. More information on the Health, Work and Retirement Study can be found on the Health and Ageing Research Team website: hart.massey.ac.nz

Software and interview

The LCH interviews were conducted over the telephone and utilised a New Zealand adaptation of a computer assisted telephone interview (CATI) software known as Abbey and developed by the University of Otago. Abbey presents the interviewer with a set of structured interview questions asked in the interview and the opportunity for the interviewer to input the response indicated by the respondent. The software uses complex logic and skip patterns, based on the respondent's demographics and previous answers, to direct the interviewer to relevant sections of the interview. For example, in the Life Course History Interview study, basic demographics around age and gender are asked at the beginning of the interview - if the respondent is female, the interviewer will be presented with questions about financial support after giving birth that would not be asked if the respondent was male.

In terms of the data collected, the program will direct the interviewer to elicit specific information (such as a date, or one or more selections from a given set response options) and only allow the interviewer to enter a valid response (even if that response is 'I don't know'). As such, the program ensures that data is complete as possible. In some sections, the program will also provide responses to common queries that participants have asked a question or provide a standard definition of a term. Once an interview is complete, interview data is uploaded from the program to a secure university server.

The New Zealand LCH project interview has twelve sections/modules that elicit information on:

1. basic demographic information about the interviewee;
2. the birth/adoption of any children, including a section on work income during this period;
3. partners the interviewee may have been in cohabiting or marital relationships with;
4. the nature, quality, and tenure duration of accommodation in childhood and in the interviewee's first independently established household;
5. childhood household composition, household living standards/income/nutrition, educational attainment;

6. personal employment history, income and employment conditions;
7. personal financial investment history;
8. health, disease and disability during childhood, and adulthood periods of ill health that lasted more than a year;
9. access to regular health and dental care during life and health behaviours;
10. use of alcohol;
11. periods of happiness, stress and persecution and their consequences;
12. exposure to difficult and traumatic life events;

Interviewees complete all modules. For more information see the LCH project Interviewer training manual¹.

Project pilot

To assess interview suitability, length and any issues with questions or software, pilot interviews were conducted in a face to face by an interviewer experienced in structured interviewing. $N = 36$ participants residing in the lower north island who had previously consented to participated in qualitative interviews were approached for pilot interview – of these, $n = 17$ completed a pilot interview. Participants selected to be part of the pilot sample were not approached or interviewed again in the LCH study. Due to changes in question wording and interview protocol resulting from the pilot, pilot data is not available in the LCH datasets.

Interviewer team and training

Interviewers participated in a 2 day training workshop addressing the following competencies required for interviewers, including:

- understand the intent of the Life Course History Project
- understand the personnel and equipment resources for the project
- know how to install and set up Abbey interview software for interviewing
- understand the principles of standardized interviewing
- have run at least one interview using the Abbey software
- have an understanding of how to conduct the interview with cultural sensitivity
- understand how to manage participant distress
- understand how to handle confidential participant information
- understand the interview protocol from start (recruitment) to finish (project close)
- understand the roles of all members of the Life Course History project team

Method

Procedure

Eligible participants were posted an introductory package by mail. This package contained a personalised introductory letter, an information sheet and a Life History Calendar. Where no telephone contact details were available, the participant was noted as lost to contact for the purposes of the Life Course History Project and was not sent an introductory package. Participants were contacted 1-2 weeks later via telephone to ask whether they would consent to participate in an LCH interview. If they did not consent or could not be contacted, this was be noted in the database. If the participant consented to the interview, the Interview Co-ordinator scheduled the interview for a time when both the participant and interviewer were available. Interviewers used a supplied mobile and

¹ Allen, J. (2017). Life Course History Project Interviewer Training Manual, Version 2.0. Palmerston North: Massey University.

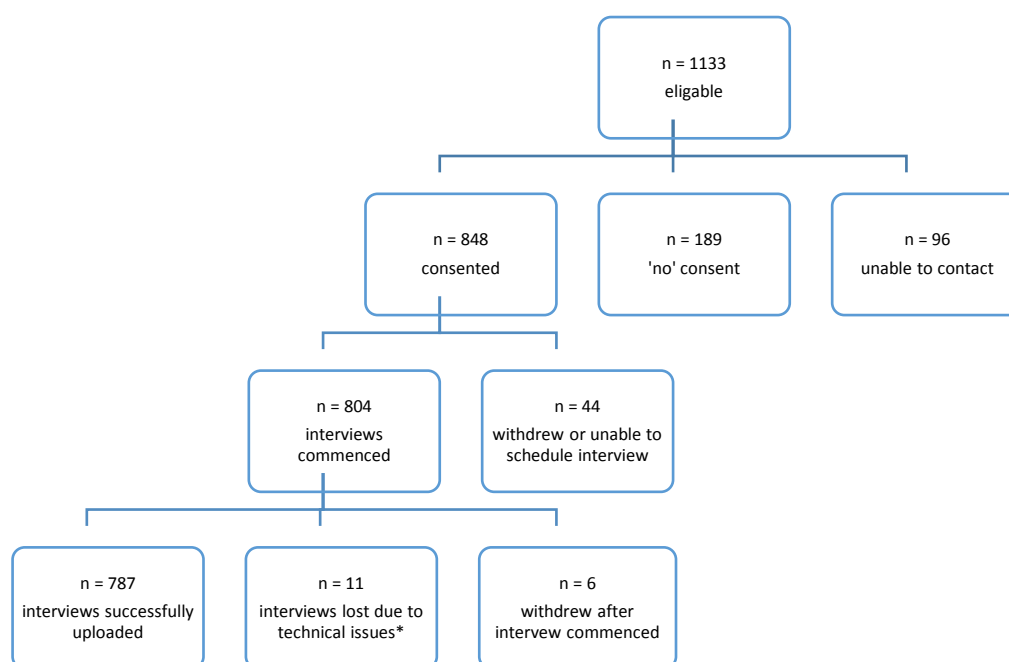
headset to contact participants and conduct the interview using their introductory scripts and standardised interview protocols. Following interview, interviewers recorded the outcome of the interview (completed, discontinued, rescheduled, withdrawn etc.) and uploaded interview data to the server.

Participant sample

Participants were persons who were recruited from the New Zealand electoral roll to participate in the New Zealand Health, Work and Retirement study in 2006. N = 1133 participants from the 2006 cohort were considered to be 'active' in the study (not deceased, withdrawn or lost to contact) at May 1, 2017 and were sent an LCH interview project information pack between May 23 and August 27, 2017. Participants were followed up by telephone approximately one week following receipt of the information pack to determine whether they would like to participate in the LCH interview project. Interviews were conducted between and May 31, 2017 and October 3, 2017. Data was downloaded from the Abbey server March 7, 2018.

Response rate

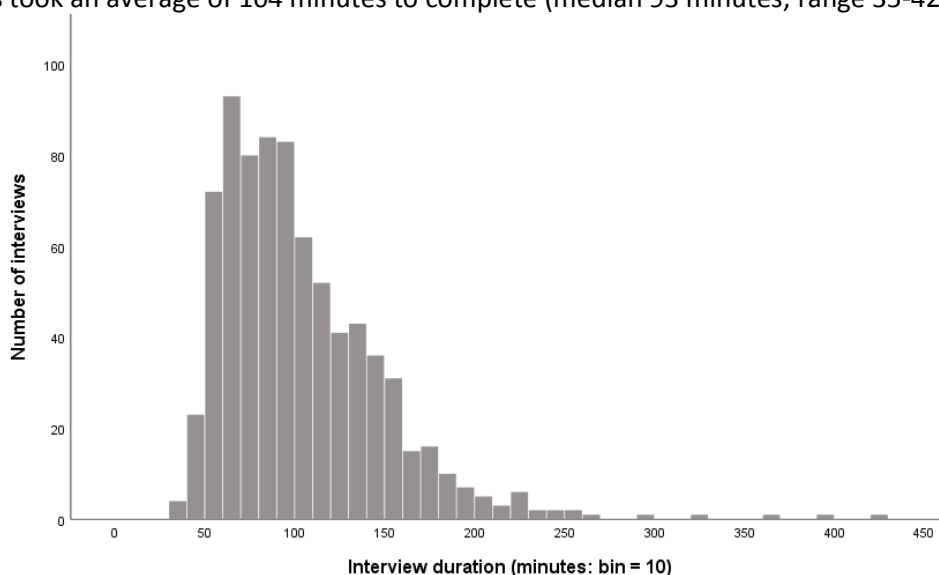
Of persons considered eligible to participate, 70% completed an interview that was successfully uploaded to the server. To facilitate comparison of sample characteristics by participation status, a data file *LCHI_Consent_1133.sav* is provided to denote participation status against ID codes of all $n = 1133$ persons approached for interview.



*Note: data were considered lost due to technical issues if an interview was recorded as complete by the interviewer but was not on the Abbey server or if interviews completed in two sections by different interviewers could not be definitely merged.

Interview duration

Interviews took an average of 104 minutes to complete (median 93 minutes; range 35-428 minutes).



ID codes and file structure

CID: This is the ID code for participants and allows linkage of LCH interview project data with other participant data from the HWR study. This code is not provided to external collaborators. A new ID code specific to the dataset requested will be provided if required.

LCHID: This is the ID code used for the LCH Interview project. This was the code assigned to participants and entered into the Abbey program by interviewers. Where an ID code could not be entered due to a duplicate already existing in the system (such as when an interview was completed in two halves by different interviewers) interviewers entered a variation of this ID and recorded it to allow interviews to be linked.


















INTNUM: This is the unique ID code assigned to each interview by the Abbey program. Where different sections of an interview with the same participant were completed by different interviewers, a single case (CID/LCHID) will be represented by two INTNUM codes.

Sections with loops: In some sections, survey questions looped until a participant indicated that no more instances of the loop applied (i.e., children, partner history, houses lived in etc.). Some sections contained multiple loops. The number of loops within a section can be observed in the data dictionary and the datasets. The number of iterations completed by a participant for each loop in each section is denoted in the data by 'NitsSxLx' where Sx denotes the section number and Lx indicates the loop number within the section i.e., the number of iterations completed by a participant in the first loop of the section interview section is indicated by variable NItsS2L1.

Sections with no loops		Sections with loops	
Number	Name	Number	Name
1	Introduction	2	Children history
5	Childhood history/Maori descent	3	Partner history
7	Financial Investment history	4	Accommodation history
9	Health care history	6	Employment history
10	Alcohol consumption	8	Health history
11	General life and Discrimination history		
12	Difficult life events/caring/Other		

Data for loops has been converted from a long to a wide format for the purposes of data storage and ease of calculation. The data for the first iteration within each loop is denoted by a variable name followed by a '.1', the second by '.2', the third by '.3' etc.

File structure: Each file provides participant responses for one of the twelve LCHI interview sections. Each row represents one unique case. Cases can be merged across sections using the CID code.

 Raw data	30/05/2018 12:00 ...	File folder	
 Variable labels syntax	29/05/2018 4:22 p...	File folder	
 Version archive	30/05/2018 12:01 ...	File folder	
 LCHI_Consent_n_1133.sav	30/05/2018 11:39 ...	SPSS Statistics Dat...	105 KB
 LCHI_Section_01_V1.3.sav	30/05/2018 11:48 ...	SPSS Statistics Dat...	19 KB
 LCHI_Section_02_V1.3.sav	30/05/2018 11:49 ...	SPSS Statistics Dat...	420 KB
 LCHI_Section_03_V1.3.sav	30/05/2018 11:50 ...	SPSS Statistics Dat...	131 KB
 LCHI_Section_04_V1.3.sav	30/05/2018 11:50 ...	SPSS Statistics Dat...	1,636 KB
 LCHI_Section_05_V1.3.sav	30/05/2018 11:51 ...	SPSS Statistics Dat...	116 KB
 LCHI_Section_06_V1.3.sav	30/05/2018 11:52 ...	SPSS Statistics Dat...	1,448 KB
 LCHI_Section_07_V1.3.sav	30/05/2018 11:53 ...	SPSS Statistics Dat...	23 KB
 LCHI_Section_08_V1.3.sav	30/05/2018 11:53 ...	SPSS Statistics Dat...	383 KB
 LCHI_Section_09_V1.3.sav	30/05/2018 11:54 ...	SPSS Statistics Dat...	118 KB
 LCHI_Section_10_V1.3.sav	30/05/2018 11:55 ...	SPSS Statistics Dat...	47 KB
 LCHI_Section_11_V1.3.sav	30/05/2018 11:56 ...	SPSS Statistics Dat...	103 KB
 LCHI_Section_12_V1.3.sav	30/05/2018 12:00 ...	SPSS Statistics Dat...	432 KB
 Version notes.txt	30/05/2018 12:02 ...	Text Document	2 KB