ATTACHMENT 5—NEW QUESTIONS AND LINES OF INQUIRY

BLS has undertaken a continuing design effort to examine the current content of the NLSY79 and provide direction for changes that may be appropriate as the respondent's age. The 2020 instrument reflects a number of changes recommended by experts in various fields of social science and by our own internal review of the survey's content. The major changes are described in this attachment. Additions to the questionnaire are accompanied by deletions of previous questions so that we expect the overall time required to complete the survey to be approximately 74 minutes.

Main Youth Survey

Additions/Modifications

Additions

The NLSY79 is the only U.S. data source that permits us to see a nationally representative sample over their entire working life. As the respondent's approach retirement ages, the content of the survey is being adjusted to permit the study of retirement decisions. The new questions ask about cognition and wealth. In addition, the recent COVID-19 outbreak may affect retirement by affecting employment, health, and wealth. We have added approximately 4 minutes of questions to Round 29 to collect some of the effects of the coronavirus pandemic on these aspects of the NLSY79 cohort's lives.

Employment. In Round 29, for every job held in March 2020, respondents will be asked if hours, location, and earnings from the job changed due to the coronavirus outbreak.

> _Cognition._ In Round 29, all respondents will go through a battery of cognition assessments. These include self-rated memory, word recall (immediate and delayed), backward counting (from 20 and from 86), and serial 7s, which were administered in the NLSY79 at approximately age 48. In addition, Round 29 will include items on dates and name. The former asks respondent the day, month, year for today's date; the latter asks for names of the president, vice-president and everyday objects ("what do you use to cut paper?"). This module is sponsored by National Institute of Aging. Together with the cognition module asked around age 48, these new data will begin to trace out a path on cognitive functioning.

> _Health (include smoking and drinking)._ In Round 29, we will add questions about nutritional practices that have been asked previously, most recently in Round 27. We will also add the CES-D (depression index) for all respondents. The CES-D has been asked of the full sample in 1992, 1994, and as part of the 40+, 50+, and 60+ health modules from 1998 on.

> Re-asking these health items is appropriate in the NLSY79 as they may have direct effects on current and future employment, functionality, and retirement decisions.

> In addition, we will ask questions that ask whether the respondent was diagnosed with COVID-19 and whether she thinks she was infected with COVID-19. All respondents will be asked questions on the inability to receive and the delay of various types of medical care because of the Coronavirus outbreak. These items will also be asked in the NLSY79 Young Adult survey.

Questions that gather data on the health impacts of the Coronavirus outbreak are appropriate in the NLSY79. Beyond broadening and adding to data collected on other federal surveys, including receiving CARES Act payments, they provide a unique opportunity to understand the long-term effects of COVID-19 on health outcomes and consequently on employment.

Income, Recipiency, Debt and Assets. The rotating assets module will be included in Round 29. We will again include the questions on debt and assets, bankruptcy, and financial distress in Round 29. These questions have been asked in every other round of the NLSY79. We plan to rotate them out for Round 30.

In Round 29, we will also add question on whether the respondent received payments and if so how much, from the Coronovirus stimulus package or CARES Act.

Streamlining the Content

Household. Streamline the confirmation of education of household members. Confirm only for spouse, and children; otherwise, let the initial report of education remain.

Health (include smoking and drinking). In Round 29, we will take several steps to streamline the section on health. First, questions on height and on alcohol and tobacco use will be asked only to those respondents being asked the 60+ health module. Sample members are asked the 60+ health module only once, in the first survey they participate in after their birth cohort turns age 60. Second, follow-up questions will be dropped on 2 topics: hysterectomies and cholesterol medicine, In addition, for those respondent who report that they have been without health care coverage during the past 12 months, the follow-up question, "about how many months were you without coverage?" will be dropped. We believe that knowing that they did not have coverage during the past 12 months will be sufficient.

In addition, we will streamline the questions on sleep asked in the 60+ health module. We will continue to ask about sleep problems, but will not ask follow-up questions about which sleep disorder was diagnosed and what treatments were received.

Income, Recipiency, Debt and Assets. In Round 29, we will ask the value and amount owed for vehicles as a bundle as opposed to asking for each vehicle separately as has been the case in previous rounds.

Spouse Labor Supply. Round 29 seeks to further streamline the questions about the spouse for the recently widowed and divorced – questions about their former spouse can be difficult. In this round, we will add an item that permits the interviewer to skip subsequent questions about a spouse or partner if a respondent objects to these questions or says that s/he doesn't know.

Questions Asked Only for Respondents Not Asked in Previous Interview

A couple of modules are slotted to be asked in Round 29 only of respondents who were not interviewed in Round 28 or another previous round that included the module. These include:

Business Ownership (asked only of respondents not interviewed in rounds 24, 25, 26, and 27). This extensive set of retrospective questions on lifetime business ownership was added for Round 24. To collect the retrospective for all respondents, the full set of questions will be asked in Round 29 for respondents not interviewed in Rounds 24, 25, 26, 27, and 28.

This retrospective identifies all businesses owned by respondents since age 18 (BUSOWN-1 to BUSOWN-22), asks about businesses owned by family members (BUSOWN-23A to BUSOWN-24B), asks about patent applications (BUSOWN-25 to BUSOWN-28B), and asks respondents if they consider themselves to be entrepreneurs (BUSOWN-29). These questions are found in the business ownership section of the instrument.

Highest Degree Ever Received (asked only of respondents not interviewed in Rounds 23, 24, 25, 26, 27, and 28). In Round 23 (with follow-ups in Rounds 24 through 28), respondents were asked to report the highest degree they had ever received. In Round 29, that follow-up will continue.

<u>*Deletions*</u>

Education. In Round 29, we propose to stop asking the education section to sample members age 60 and older.

In addition, we will drop the questions that collect an event history on college attendance. The items that make up this event history included college name, dates of attendance, field of study, number of credits, and financing.

Employer Supplement. Round 29 will not include the series of question on job tasks. In Round 29, we propose to drop two of the questions that ask about job stress, while retaining four others.

We propose to streamline the questions on whether the respondent's employer makes various benefits available and on the amount of leave benefits. We will drop four benefits from the questionnaire on which benefits are available: paid maternity/paternity, life insurance, dental insurance, and company-provided or subsidized child care. We will replace those benefits by adding paid and unpaid leave to this question, by asking about the following categories: paid leave for own illness or medical care, paid leave for family member's illness or medical care, paid leave for vacation or personal time, paid leave for vacation or personal time, unpaid leave for family member's illness or medical care, and unpaid leave for vacation or personal time. We will drop the previous questions that ask which types of paid leave the respondent receives and how many paid days per year the respondent receives for each type of leave.

In Round 29, we will change the questions used to classify self-employed vs. regular workers by dropping the questions that ask about tax forms and tax filing, given that some states (CA, VT, MA) have changed the rules governing these tax forms and more states may make changes before Round 29 is fielded in 2020. In addition, we will drop the question in this series about the location of work.

We propose to rotate out a question on age discrimination that was asked in Round 28, to not ask questions on the usual start and usual stop time of work, and to streamline questions on business ownership, specifically adding skips for those items on the start of the business that have been asked in previous rounds.

Training. In Round 29, we propose to shorten the section on training by not asking questions on whether the training was used on the respondent's job, whether the training was required by the employer, the main reason for enrolling in training, and skills learned in the training program.

Spouse Labor Supply. In Round 29, we propose to not ask questions on the spouse/partner's occupation and the spouse/partner's rate of pay.

Fertility. Because there are few children under 12, we will stop asking the mother supplement and pre- and post-natal questions in Round 29.

Health (include smoking and drinking). In Round 29, we will not ask questions on dental practices, questions on exercise, or the item on the location of regular health care. We expect the questions on exercise to rotate back into Round 30.

Income, Recipiency, Debt and Assets. In Round 29, when the questionnaire collects the value of vehicles, the item collecting the year of the vehicle will not be asked. Round 29 will not ask questions about income taxes including most recent year federal taxes were filed, filing status, and the number of exemptions. Round 29 will also not ask start and stop dates on spells of recipiency.

Attitudes. In Round 29, the Rotter scale items and the TIPI will rotates out. Both were asked in Round 26 and of NIRs in 27 and 28.

Foreclosures. In Round 29, the questions about foreclosure will rotate out. These questions were asked of all participants in Round 24 and of NIRs in Round 25 through 28.

Wills. In Round 29, questions on wills will rotate out. These questions were asked of all participants in Round 25 and of NIRs in Rounds 26 through 28.

Financial Literacy. In Round 29, questions on wills will rotate out. These questions were asked of all participants in Round 25 and of NIRs in Rounds 26 through 28.

Retirement Expectations. With the exception of two questions on the expectation of being retired at age 62 and at age 65, we will rotate out the retirement expectations section in Round 29. We expect to rotate the full retirement expectation section back into the survey in a year when the assets questions are not asked.

End of interview. In Round 29, we will add a question internet access. This question was last asked in Round 26

Young Adult Survey

Changes Made to the YA 2020 Questionnaire

Some of the changes made to the Young Adult questionnaire for 2020 have been made to streamline questions and sections in order to cut down on the amount of time it takes for a

respondent to complete an interview. We always take a close look at interviewer comments and for the past few rounds have listened to complete interviews for every interviewer – often multiple interviews per interviewer. This exercise has been time intensive, but we believe that the Young Adult Survey instrument has been greatly improved as a result.

<u>Additions</u>
Most of the additions to the Round 29 YA survey are on the topics of mental health. We have also added approximately 4.5 minutes of questions to collect some of the effects of the coronavirus pandemic on the employment, health, and income of this sample.

Dating and Relationship History. While respondents are clearly our primary concern, we believe it important to assess the impact of COVID-19 on the spouse/partner's employment, because that will impact the respondent's well-being and financial security. We would therefore propose to include the questions about whether or not a spouse/partner's hours, location, and earnings from employment was affected. These questions will be asked of Young Adults who have a current/spouse partner who is currently or has been in the labor force in the last year.

Employment. In Round 29, for jobs held in March 2020, respondents will be asked if hours, location, and earnings from the job changed due to the coronavirus outbreak.

Children in the Household. The closing of K-12 schools across the country with many districts having students complete their studies remotely has added a layer of complexity and stress to parents' lives. To ascertain the impact of school closures on our respondents with school-age children in their household, we will ask whether any children were out of school for an extended period of time due to the coronavirus outbreak and how that impacted the respondent's physical, mental, and finances.

Physical and Mental Health and Well-Being. Resiliency, or the capacity to 'bounce back' or recover from various challenges, difficulties and stress, has received increasing interest from researchers, practitioners and policy makers over the past couple of decades, especially in relation to its possible impact on health and well-being. We have identified the Brief Resilience Scale (BRS) as the best option for the YA survey due to its focus on resiliency, non-clinical application, and short administration time. Smith and colleagues (2008) designed the BRS with six items, each measured on a 5-point scale (ranging from 1 = strong disagree to 5 = strong agree) to explicitly measure the ability to 'bounce back'. They examined the scale's psychometric characteristics in four samples and report that it computes as a unitary, reliable construct. They also suggest that the BRS may mediate the effects of resilience resources (i.e. optimism, social support, faith) on health outcomes and highlight that including the BRS in longitudinal studies will help to evaluate its ability to predict recovery from important stressors – both health and non-health related.   Having the BRS in the YA questionnaire, along with measures for mental and physical health, childhood adversity, life events, educational attainment, and employment history, can provide researchers with the opportunity to assess the effects of resilience on lifecourse outcomes, such as educational attainment, career trajectories, and physical and emotional health. The BRS has also been included in the main NLSY79 age 60 health module, allowing for intergenerational and with-in family research on resilience.

We are adding 6 questions to our general health section about perimenopause and menopause. These questions will be asked of female respondents over age 30. Perimenopause and menopause can have repercussions on both physical and mental health and well-being, and early-onset menopause affects the fertility and childbearing trajectories of women who experience it, all of which can impact career trajectories of women. By beginning these questions now, these data will allow researchers to look at the progression of perimenopause and menopause across time for a group of women for whom we have age at menarche and a fertility history, including information about contraceptive use. When matched to information on health collected contemporaneously rather than retrospectively throughout the lives of these women, these questions will provide unique opportunities to study trajectories of health, and match such trajectories to an array of family, environmental and behavioral variables that have also been collected contemporaneously over the same decades. Because their mothers have also been asked about menopause in the NLSY79 questionnaire, there are novel intergenerational research possibilities. Further, as more and more female siblings also age into their thirties, there will be opportunities for studying behaviors and outcomes within families. These questions were developed based on questions asked in National Health and Nutrition Examination Survey (NHANES), the Health and Retirement Survey (HRS), and the Midlife in the United States (MIDUS) surveys, as well as those included in the NLSY79 questionnaire, with input from NICHD who provides funding for the NLSY79-YA grant cases.

To ascertain the impact of the Coronavirus/COVID-19 on the respondent's own health we will ask questions whether the respondent was diagnosed with COVID-19 and whether she thinks she was infected with COVID-19. All respondents will be asked questions on the inability to receive and the delay of various types of medical care because of the Coronavirus outbreak. These question are also being fielded in NCHS surveys.

In addition to the impact on the respondent's own health, we believe it important to think about how illness among family members might impact the respondent. Consequently, we will ask whether any other household members have had Coronavirus. We will also ask whether any other family members of close friends have had Coronavirus. The YA survey already asks whether a family members or close friends has died. We propose to add a follow that asks whether a family member or close friend has died from Coronavirus.

Income and Assets. We propose to add questions on three topics to better get at how the outbreak of coronavirus and its wake may have affected the respondents personal finances. First, we will add questions about the receipt of Coronavirus stimulus payments. Second, we will add a question on whether the respondent has been late on or missed payments. Third, we have been asking for several rounds now about whether or not the respondent has "emergency or rainy day funds that would cover your expenses for 3 months, in case of sickness, job loss, economic downturn, or other emergencies". We would like to ask those who said that they had a rainy day fund at their date of last interview, whether they used any funds that had been set aside for emergencies because of the Coronavirus/COVID-19 outbreak.

End of interview. We would also like to include an open ended question asking respondents to let us know of any other ways that their lives changed after March 2020 as a result of COVID-19. We can gain insight into what is important to our respondents that we may have not considered asking.

References:
Baydar, Nazli, Patricia Hyle and Jeanne Brooks-Gunn. "A Longitudinal Study of the Effects of the Birth of a Sibling During Preschool and Early Grade School Years." *Journal of Marriage and Family* 59,4 (November 1997): 957-965.

Betts, Peter. "Developing survey questions on sexual identity: Cognitive/in-depth interviews." Office for National Statistics, July 2009.

Christie-Mizell, C. André. "Bullying: The Consequences of Interparental Discord and Child's Self-Concept." Family Process 42,2 (Summer 2003): 237-251

Colen, Cynthia G. and David Ramey. "Is Breast Truly Best? Estimating the Effects of Breastfeeding on Long-term Child Health and Wellbeing in the United States Using Sibling Comparisons." *Social Science and Medicine* 109 (May 2014): 55-65.

Crockett, Lisa J., Kristin L. Moilanen, Marcela Raffaelli and Brandy A. Randall. "Psychological Profiles and Adolescent Adjustment: A Person-Centered Approach." *Development and Psychopathology* 18,1 (Winter 2006): 195-214.

Doyle, D. M., & Molix, L. (2015). Perceived Discrimination and Social Relationship Functioning among Sexual Minorities: Structural Stigma as a Moderating Factor. Analyses of Social Issues and Public Policy : ASAP, 15(1), 357–381.

Hughes, M. E., Waite, L. J., Hawkley, L. C., & Cacioppo, J. T. (2004). A Short Scale for Measuring Loneliness in Large Surveys: Results from Two Population-Based Studies. Research on Aging, 26(6), 655–672.

Matthews, T., Danese, A., Wertz, J., Odgers, C. L., Ambler, A., Moffitt, T. E., & Arseneault, L. (2016). Social isolation, loneliness and depression in young adulthood: a behavioural genetic analysis. *Social Psychiatry and Psychiatric Epidemiology*, *51*, 339–348.

Messer, Bonnie and Susan Harter. 2012 The Self-Perception Profile for Adults: Manual and Questionnaires Revision of the 1986 manual.

Miller, Kristen and J. Michael Ryan. "Design, Development and Testing of the NHIS Sexual Identity Question." National Center for Health Statistics, October 2011.

Phelan, S. M., Burgess, D. J., Puhl, R., Dyrbye, L. N., Dovidio, J. F., Yeazel, M., … van Ryn, M. (2015). The Adverse Effect of Weight Stigma on the Well-Being of Medical Students with Overweight or Obesity: Findings from a National Survey. *Journal of General Internal Medicine*, *30*(9), 1251–1258.

Redford, Jeremy and Aimee Van Wagen. "Measuring Sexual Orientation Identity and Gender Identity in a Self-Administered Survey: Results from Cognitive Research with Older Adults." Presented: San Francisco, CA, Population Association of America Meetings, May 2012.

Rico-Uribe, L. A., Caballero, F. F., Olaya, B., Tobiasz-Adamczyk, B., Koskinen, S., Leonardi, M., … Miret, M. (2016). Loneliness, Social Networks, and Health: A Cross-Sectional Study in Three Countries. *PLoS ONE*, *11*(1), e0145264.

Sansoni J, Marosszeky N, Sansoni E, Fleming G (2010) Final Report: Effective Assessment of Social Isolation. Centre for Health Service Development, University of Wollongong

Smith, Bruce W, Jeanne Dalen, Kathryn Wiggins, Erin Tooley, Paulette Christopher and Jennifer Bernard. 2008 "The Brief Resilience Scale: Assessing the Ability to Bounce Back." International Journal of Behavioral Medicine, 15: 194-200.

Valtorta NK, Kanaan M, Gilbody S, et al. Loneliness, social isolation and social relationships: what are we measuring? A novel framework for classifying and comparing tools. BMJ Open 2016;6:e010799. doi:10.1136/bmjopen-2015- 010799

Zavaleta, D., Samuel, K. & Mills, C.T. Measures of Social Isolation. Social Indicators Research (2016).

Zavaleta, D., Samuel, K., and Mills, C. (2014). "Social Isolation: A Conceptual and Measurement Proposal." *OPHI Working Papers* 67, University of Oxford.
Young Adult's Perception of Mother's Health and Well-Being

We are adding four questions to the YA survey that ask the YAs about their perceptions of their mothers' health and well-being.