

## ATTACHMENT 5-- NEW QUESTIONS AND LINES OF INQUIRY

The NLSY97 is the only data source that tracks the work and private lives of its age cohort. As the respondents proceed through their prime working years and mid-lives, the content of the survey is being adjusted to measure details pertinent to the evolution of their careers, relate their current lives to past experiences, and capture the emerging circumstances of their health, wealth and family that will impact their futures.

In Round 22 of the NLSY97, BLS has continued its design efforts to ensure that the content of the survey aligns with the changing circumstances of the cohort as the respondents age. The Round 22 instrument reflects a number of changes recommended by experts in various fields of social science and by BLS's 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. The expected overall time required to complete the survey is approximately 71 minutes.

### Additions

*Employment.* In Round 22, the NLSY97 questionnaire has been enhanced to measure details about platform work, addressing the growing prevalence of using a platform to line up work. One new question asks whether a respondent uses an app or a website to select projects, pick tasks, or connect to a customer or business. A second question asks which app or website was used most often for this particular job. The development of these questions drew on similar questions asked by BLS in the July 2023 Current Population Survey Contingent Worker Supplement.

Many researchers use the NLSY97 to study work arrangements. To provide these researchers with more flexibility in research, two new questions are added to Round 22. First, all workers will be asked to specify whether they are an employee, an independent contractor, or hired on an informal basis. A second question is phrased slightly differently for respondents that had previously identified as self-employed. These questions were created with help from Dr. Susan Houseman (W.E. Upjohn) and are based on a draft of questions that also appear in the Jobs for the Future (JFF) Job Quality Survey (Gallup).

Additionally, respondents who report being self-employed will be asked a new question regarding their business ownership. This screener question will allow certain respondents to skip out of a series of business ownership questions, if they do not consider themselves business owners. This question was created by Dr. Susan Houseman for use in Round 1 of a new youth cohort that is under development (the NLSY27) and is included in Rd 22 of the NLSY97 to reduce respondent burden.

Workers may need special accommodation due to health problems, to work. Availability of workplace accommodation may affect how much or whether an employee can work. Additional questions are added in Round 22 to address whether and which accommodations are offered by employers. Respondents are asked if they are provided with special equipment, help, shortened work days, change in work hours, more frequent rest, working from home, or special transportation. These questions are modeled after worker accommodation questions that were introduced in 2022 to the Health and Retirement Study (HRS).

*Income, Reciprocity, Debt and Assets.* As the NLSY97 has collected information about respondents' assets in 5-year intervals, and the oldest members of the NLSY97 (born in 1980) will be turning 45 when fielding begins, Round 22 will include a new assets module ("assets at 45"). This module will be similar

to the set of questions administered at age 40 (note: the youngest members of the cohort will complete the “assets at 40” module), allowing data users to compare the evolution of asset holdings over time. In addition, the “assets at 45” module will include a few enhancements. Instead of asking a single question about pensions, the new assets module will separate out defined benefit and defined contribution pensions as these plans differ greatly. As respondents approach retirement age, it becomes more important to collect an accurate portrait of preparations and expectations for retirement, as this will affect labor supply in the years to come. For that purpose, in Round 22, there will be five questions that gauge preparation and expectations for retirement. These questions have all been previously asked in the NLSY79, in Round 26 and Round 30. Respondents will be asked how they define retirement and what the chances are that they will still be working at ages: 62, 65, and 67. Respondents are also asked if they (or their spouse) have calculated how much they would need to save, consulted a finance professional about how to plan, read magazines, books, or on the Internet about planning, talked to a family member or friend, or attended a workshop or class about financial planning for retirement.

*Health.* As the NLSY97 cohort ages it will be important to track major components of their health that can affect their working and private lives. In addition to NLS’s periodic modules (health at 29, health at 38-39, etc.) that provide comprehensive snapshots of sample members’ health, the survey has tracked a small number of general health measures on a more frequent basis. In Round 22, as a midlife baseline measure of physical limitations, six commonly used measures of disability are added. These questions are the same as those asked in the American Community Survey (ACS). These questions ask if the respondent is: deaf or has serious difficulty hearing; is blind or has difficulty seeing, even with glasses; has serious difficulty concentrating, remembering, or making decisions; has difficulty dressing or bathing; has difficulty doing errands alone such as visiting a doctor’s office or shopping.

### Deletions

*Health.* Remaining Coronavirus specific questions retained in Round 21 were removed. Three questions about chronic conditions added in Round 21 will only be asked of respondents who answered “no” in Round 21. In addition, health behaviors that were asked about smoking and alcohol consumption are removed for this round.

### Additional Changes

There are a few places where we made very minor changes to the wording of questions, since there were indications that the questions were confusing to respondents. There are also questions where a new response category is added for clarity or to reduce “other specify” answers.

Details by section on all changes made to the questionnaire are provided below.

### Household Information

1. YHHI 51910 and YHHI 51920 phase out with Health at 38.

**Schooling:** No changes.

### Employment

1. Add Platform Work Questions:

- a. PLATFORM\_1 (all jobs except military) Do/did you use an app or website to select projects, pick tasks, or directly connect you to customers or businesses to do tasks for your work [as/for] [employer name([loop])]?
 

For example, people may use an app or web site to line up work as a handyman, freelance graphic designer, or rideshare or food delivery driver. People also may use an app that lists projects for hire or a website that lists customers with specific tasks like creating software, designing a logo, or painting a house.

Please do not include sites used for communication (such as Zoom, Microsoft Teams, Google, WhatsApp, or email) or sites that assist you in performing tasks (such as mapping or translation sites).

If “Yes” or “Sometimes” Platform\_2

- b. PLATFORM\_2 What is the name of the app or website where you [get/got] MOST of your work [as/at] [employer name ([loop])]?
 

INTERVIEWER: RECORD ONLY THE ONE APP OR WEBSITE USED TO GET MOST WORK

VERBATIM: \_\_\_\_\_

2. Add Work Arrangement Questions:

- a. WORK\_ARRANGEMENT\_1 (ask everyone but self employed + military - all of the other job types (employee basically) get this-each round) ) Which of the following best describes your employment arrangement on this job with [employer name]? [Are/Were] you an employee, an independent contractor, independent consultant, or freelancer, or [do/did] you work on an informal or cash basis? 1. EMPLOYEE 2. INDEPENDENT CONTRACTOR, INDEPENDENT CONSULTANT OR FREELANCER 3. INFORMAL OR CASH BASIS
- b. WORK\_ARRANGEMENT\_2 (all self-employed) Which of the following best describes your self-employment work [with/as] [employer name]? [Are/Were] you an independent contractor, independent consultant, or freelancer, [do/did] you work on an informal or cash basis for customers, or [are/were] you something else? 1. INDEPENDENT CONTRACTOR, INDEPENDENT CONSULTANT OR FREELANCER 2. INFORMAL OR CASH BASIS FOR CUSTOMERS 3. SOMETHING ELSE

3. Add a new Business Screen:

- a. NEWBUSSCREEN(ask only if self employed) Do you own or co-own a business? Businesses include corporations, limited liability companies, partnerships, and sole proprietorships.
  - 1. Yes (Go to YEMP-101102)
  - 2. No (Go to YEMP-101105 and then go to YEMP-101109)

4. Add a new response category to YEMP-58400A-REV

- a. Add “20 Lack of customers or clients, no demand (plan to re-open)”

5. Change response 25 of YEMP-58400A-REV

- a. Change 25 to “Stopped working at job/business for personal or other reasons, no closedown required

6. Add Worker Accommodation questions

- a. J967 (all workers) Many people need special accommodations for health problems to make it easier for them to work. This could include things like getting special equipment, getting someone to help them, varying their work hours, working from home, or taking more breaks and rest periods. Do you/does your employer currently do anything special to make it easier for you to stay at work? If yes,
- b. J968 Does your employer get you special equipment to help you do your job?
- c. J969 Does your employer get someone to help you do the parts of your job that you have difficulty doing because of your health?
- d. J970 Does your employer shorten your work days?
- e. J971 Does your employer allow you to change the time you come to and leave work?
- f. J972 Does your employer allow you more breaks and rest periods?

- g. J973 Does your employer allow you to work from home?
- h. J974 Does your employer arrange for special transportation to help you do your job?

**Training:** No changes.

**Marriage:**

- 1. Update age ranges for YMAR-3300 and YMAR-3300A
  - a. Oldest age range is 40+, add a few additional ranges as the sample ages

**Fertility:** No changes

**Child Care:** No changes.

**Income**

- 1. Move YINC-498 – YINC-499 to the Assets 45 section

**Housing:** No changes.

**Assets40:** No changes.

**Assets45:** New Section

- 1. Create YAST45-???? Counterparts to all YAST40-???? questions *except* YAST40-4870 (which will not be asked in the Assets45 module).
- 2. Move YINC-498 - YINC-499 to the Assets45 module (to be asked less frequently)
- 3. Replace YAST45-4270 with
  - a. YAST45-4270-DB Many employers and unions offer pensions or retirement plans. In some types of retirement plans, the amount of benefits is based on a formula usually involving your years of service and salary when you retire. Do [you/you and/or your spouse/you and/or your partner] have any savings in a "formula" plan?

(READ IF NECESSARY) Some people think of a formula plan as a "traditional pension plan."

- b. and YAST45-4270-DC And YAST40-4270-DC "In other types of retirement plans, money is accumulated in a type of savings or investment account for you until you retire. Do [you/you and/or your spouse/you and/or your partner] have any savings in a "savings or investment account" plan? An example of a savings or investment account plan is a 401K.

(READ IF NECESSARY) Other examples of savings or investment account plans include: 403B's, 457 plans, IRA-SEP plans, and IRA-SIMPLE plans.

(READ IF NECESSARY:) Other tax-advantaged accounts such as Traditional IRA or Keogh plans or accounts for saving for educational expenses, such as Coverdell IRAs or 529 plans will be collected later.

- 4. Add Retirement Expectation Questions
  - a. RETIRE\_EXP\_P2\_2 from NLSY79 Rd 26 "People often have different ideas about what it means to become retired. How would you define retirement for yourself?"

(INTERVIEWER: PLEASE SELECT ALL THAT APPLY.)

- Reduction in hours of work per week
- Stop working entirely
- Begin receiving retirement payments from a pension
- Begin receiving payments from Social Security

- Quit career job and work at more fun or satisfying job
  - Spouse stops working
  - Spouse reduces his/her hours of work per week
  - Begin receiving retirement payments from a defined contribution plan
  - Become eligible for health care provided for by Medicare
  - Expects to have to work out of necessity
  - Never plans to stop working
  - Other
- b. RETIRE\_EXP\_P2\_E1 (from NLSY79 Rd 26) What do you think the chances are that you will be working full-time after you reach age 62? Enter 0 to 100
  - c. RETIRE\_EXP\_P2\_E2 (from NLSY79 Rd 26) What do you think the chances are that you will be working full-time after you reach age 65? Enter 0 to 100
  - d. RETIRE\_EXP\_P2\_E2B (from NLSY79 Rd 30) What do you think the chances are that you will be working full-time after you reach age 67?
  - e. RETIRE\_EXP\_P2\_4A (from NLSY79 Rd 23-26, edited based on HRS module)

**Program Participation:** No changes.

**Self-Administered:** No changes.

**Contact:** No changes.

**Health Behaviors:** Remove

**Health**

1. Remove YHEA-COVID\_1\_REV – YHEA-COVID\_2\_VACNUM
2. Ask YHEA-1310A – YHEA-1310C -only of those who previously answered “no”
3. Ask 6 ACS Disability questions (Y/N answers)
  - a. Are you deaf, or do you have serious difficulty hearing?
  - b. Are you blind, or do you have serious difficulty seeing, even when wearing glasses?
  - c. Because of a physical, mental, or emotional condition, do you have serious difficulty concentrating, remembering, or making decisions?
  - d. Do you have serious difficulty walking or climbing stairs?
  - e. Do you have difficulty dressing or bathing?
  - f. Because of a physical, mental, or emotional condition, do you have difficulty doing errands alone such as visiting a doctor’s office or shopping?

**End of Interview:** No changes