

**Center for Demography and Ecology**

**University of Wisconsin-Madison**

**Surveys of the Life Course and Aging:  
Some Comparisons**

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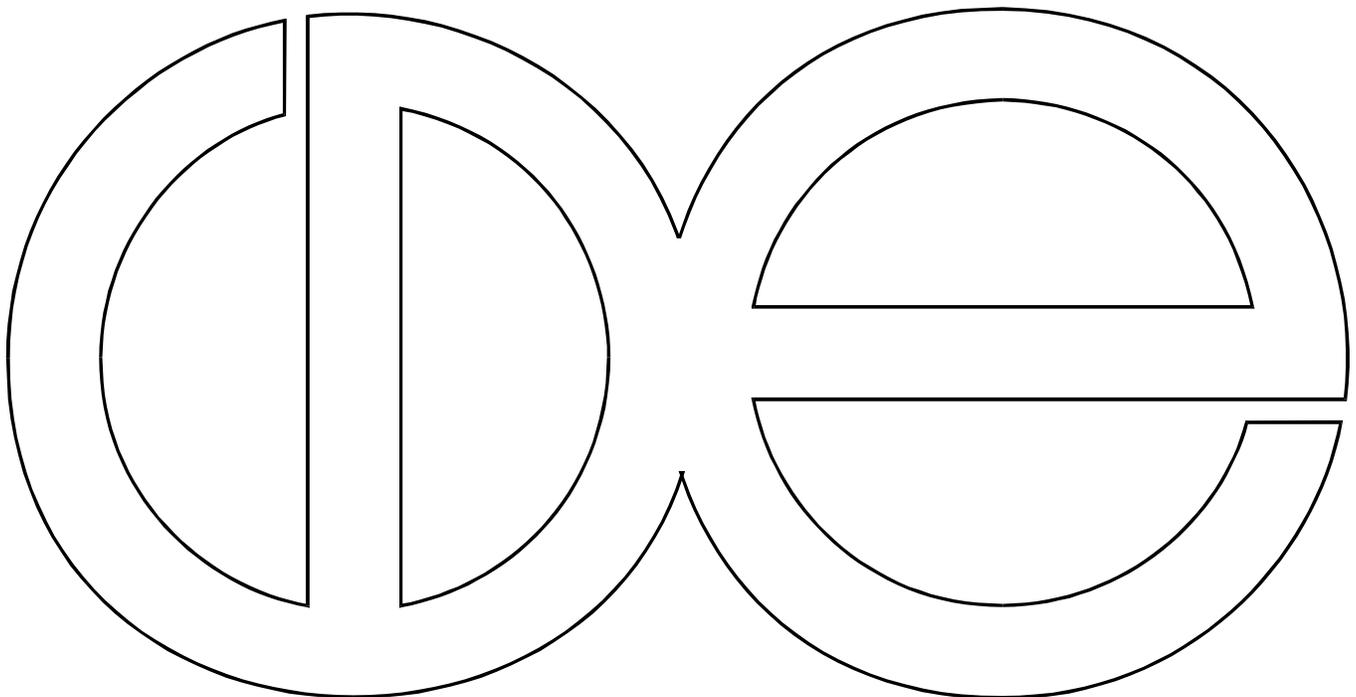
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## **Surveys of the Life Course and Aging: Some Comparisons**

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### **Abstract**

In this paper, we introduce, compare, and evaluate the design and content of five major longitudinal studies of aging: the Wisconsin Longitudinal Study (WLS), Health and Retirement Survey (HRS), National Survey of Families and Households (NSFH), Americans' Changing Lives (ACL), and Midlife in the United States (MIDUS). We first compare population coverage, sampling design, response rate, observational duration, sources of relational and multi-level data, and links to public records. Overall, WLS, HRS, and NSFH excel in many respects. We also evaluate questions and measures in each study. In topical coverage, WLS and NSFH are the most complete. In question quality, WLS, HRS, and NSFH excel in several areas, while MIDUS and ACL stand out mainly in life event inventories, psychological measures and some health measures.

In several major reports, expert panels of the National Research Council (NRC) have offered new, but convergent recommendations for future research on health and aging (National Research Council 1997; 2000a; 2000b; 2000c; 2000d; 2001a; 2001b). Their common themes are (1) the importance of social context for behavior; (2) interdisciplinary approaches to scientific and policy issues; (3) the need for developmental or life-course perspectives; (4) recognition of multiple levels of influence; (5) identification of mechanisms or pathways to health and illness; (6) development and use of new methodologies; and (7) development of new institutional and training infrastructure to support the new research agenda (Berkman 2001). These admirable goals require continued development of major, public longitudinal data resources on population health and aging.

In a recent symposium at the National Academy of Sciences, Hauser (2001) outlined several strengths of longitudinal population surveys: (1) Giving us “the big picture,” global descriptions of variations in the life course in populations; (2) Making it possible to model dynamic processes over long periods of time; (3) Providing data across time about role-relationships, e.g., parent-child, sister-brother, wife-husband, as well as about persons; (4) Providing data at multiple levels of analysis, e.g., the biological, neurological, psychological, and social, as well as varying levels of aggregation; (5) Providing representative data about rare as well as common events and processes; (6) Leading to serendipitous findings; and, taken together with other studies, (7) Permitting piecewise construction of synthetic models of life-course processes.

We have assembled a tabular comparison among five major studies.<sup>2</sup>

1. Wisconsin Longitudinal Study (WLS) – <http://dpls.dacc.wisc.edu/WLS/wlsarch.htm>
2. Health and Retirement Survey (HRS) – <http://www.umich.edu/~hrswww/>
3. National Survey of Families and Households (NSFH) – <http://www.ssc.wisc.edu/nsfh/home.htm>

4. Americans' Changing Lives (ACL) – <http://www.icpsr.umich.edu/>

5. Midlife in the United States (MIDUS) – <http://midmac.med.harvard.edu/>

The last of these is not (yet) a longitudinal study, but a second wave has been proposed.

In our judgment, each of the five focal studies has made important contributions to our knowledge of midlife development, health, and aging, and each is likely to make important contributions in the future. Moreover, we believe that multiplicity, comparability, and partial overlap in content are valuable features of the nation's repertoire of longitudinal studies (Hauser 2001). Thus, we would not suggest that any one of them is a substitute for any of the others.

Among the major omissions from the comparison, the Panel Study of Income Dynamics (PSID) is probably most important.<sup>3</sup> The PSID has followed the members of 5000 American families – and the sample members who have left those families – since 1968. Its regular – annual or biennial – coverage of income sources and amounts, employment, family composition changes, and demographic events is unparalleled. The surveys often contain psychological variables and health measures. Unfortunately, because of variations in the supplemental content of the PSID – and in its sample design and coverage across time – we were unable to include it in the comparison tables. We have also excluded other important studies of the elderly, either because of short duration (the two Longitudinal Studies of Aging, LSOA), focus on institutional populations (National Long-Term Care Survey, NLTCs)–or because they are no longer active–the older cohorts of the National Longitudinal Survey of Labor Market Experience (NLS). The Behavior and Social Research unit within the National Institute of Aging has prepared a very useful summary of the design and content of its larger set of aging surveys and studies (<http://www.nih.gov/niaresearch/extramural/behavior/data00.pdf>).

#### **A Description of the Wisconsin Longitudinal Study**

The WLS began with a 1/3 random sample (N = 10,317) of women and men who graduated from Wisconsin high schools in 1957.<sup>4</sup> The original purpose of the study was to assess the demand for higher education in Wisconsin. The next two waves of survey data were collected from the graduates or their parents in 1964 and 1975. Those data provide a full record of social background, high school curriculum, youthful aspirations and social influences, schooling, military service, family formation, labor market experiences, and social participation. Early survey data were supplemented by earnings of parents from state tax records, mental ability test scores and rank in high school class, and characteristics of communities of residence, schools and colleges, employers, and industries. Recently, the WLS added state archival data on high school district resources from 1954 to 1957 (Olson and Ackerman 2000a; 2000b). The WLS records for graduates are also linked to those of three best same-sex high school friends; about half the graduates have a named peer in the sample. Data on the occupational careers of male graduates are supplemented by Social Security earnings histories from 1957 to 1971.

In 1975, the WLS obtained a roster of living siblings and chose a focal sibling at random for each graduate (including all twins). Adolescent cognitive ability test scores have been located for 6619 siblings, 75 percent of the focal siblings of graduates. In 1977 parallel interviews were carried out in a highly stratified sample of 2100 of these randomly selected siblings.

In 1992-94, the WLS conducted telephone and mail surveys of graduates and nearly identical telephone and mail surveys of an expanded random sample of brothers and sisters of graduates. These updated measurements of marital status, child-rearing, education, labor force participation, jobs and occupations, social participation, and future aspirations and plans among graduates and siblings. In addition, they expanded the content of earlier follow-ups to include psychological well-being, mental and physical health, wealth, household economic transfers, and social comparison and exchange relationships with parents, siblings, and children.

In 1975, measurement procedures resembled those of the Current Population Survey (CPS) and the 1973 Occupational Changes in a Generation Survey (OCG). In 1992, the surveys balanced continuity of these procedures with comparability to other well-designed surveys, e.g., Health and Retirement Survey (HRS), National Survey of Families and Households (NSFH), NIH surveys of work and psychological functioning, and the NORC General Social Survey (GSS). The survey design was also coordinated with members of the MacArthur Foundation Research Network on Successful Midlife Development, with the Whitehall II study (Marmot et al. 1991), and with Wadsworth's (1991) longitudinal cohort study of births in Great Britain in 1946.

In 1992, the 1-hour telephone interview covered life history data, family rosters, and job histories, which have many skips or branches. For example, a job history protocol for CATI (Computer-Assisted Telephone Interview), which covered 94% of jobs held since 1975 that lasted 6 months or longer. Because lower response rates were anticipated in the mail survey, the CATI instrument contains selected items from key inventories of personality (The Big Five, John 1990; 1991), health (depression and alcohol use), and well-being (Ryff 1989; Ryff and Keyes 1995), of which there are more detailed measures in the mail instrument. The mail instrument also added measures of well-being, social contact, exchanges, and health, including an extensive account of menopausal experience. The sibling mail survey was modified to obtain additional measures of physical health and health-related behaviors, richer accounts of women's menopausal experiences, and more information about relationships between the focal sibling and other family members—including indicators of childhood abuse.

Recently, WLS graduates and siblings have been matched to the National Death Index-Plus (NDI-Plus)—using SSNs, names, and birthdates as identifiers—in order to obtain cause(s) of death and confirm date and place of death.

The WLS sample design has become increasingly complex over time, but a fair summary is

that, in 1992, the project completed telephone interviews with 8493 WLS graduates out of 9741 survivors, and it interviewed 4804 siblings out of 6260.<sup>5</sup>

The strengths of the WLS as a resource for studies of midlife and aging lie in its *longitudinal scope*, its exceptional *sample retention*, the *content and quality* of survey and administrative data, and its *relational design*: the fact that it has followed a large and diverse sample from high school graduation to the cusp of retirement and that it has followed a number of social and economic relationships between the graduates and their significant others.

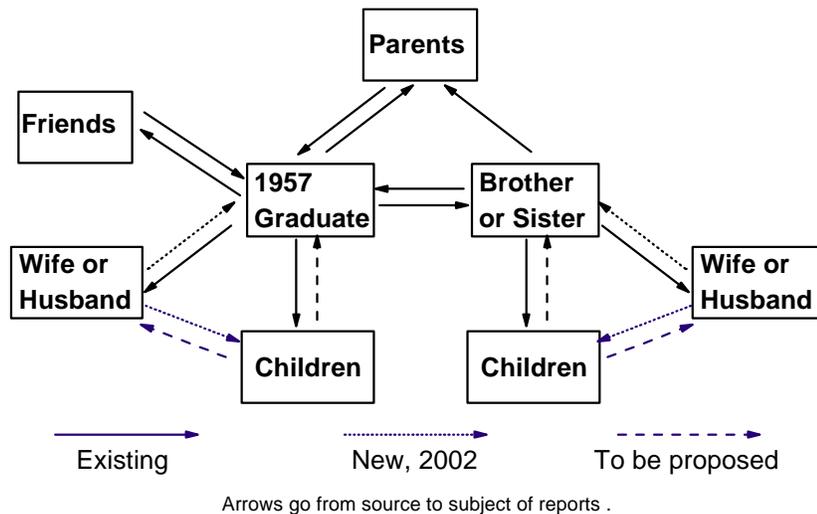
While the WLS data center on the graduates of 1957, it is now more useful to think of the graduates as focal points in sets of relationships with aging parents, spouses, adult children, and brothers and sisters, as shown in Figure 1, as well as with the localities and social institutions through which they have passed—high schools, colleges, and employers. WLS files include full survey and administrative data records for graduates, linked with those of friends and siblings.

Parents were the initial post-high school informants about graduates, but a great deal of information about parents has come from administrative record data or from siblings. Data have not previously been

obtained from spouses or children—except sometimes to help locate sample members.

The parallel data for siblings are a special strength of the WLS. Siblings provide unique data—self-reporting variables that cannot be obtained from proxies, cross-validating information

**Figure 1. Relational Links in the Wisconsin Longitudinal Study**



about graduates and their families, and complementing accounts of inter-household (and intergenerational) exchanges. Analytically, the sibling data permit construction of multi-level models of family and individual effects on life course outcomes (Hauser and Sewell 1986; Hauser, Sheridan, and Warren 1999).

Among Americans aged 60 to 64 in March 2000, 66.7% are non-Hispanic white women and men who completed at least 12 years of schooling (U.S. Bureau of the Census 2000: Table 1a) and thus resemble the WLS cohort. The WLS is unusually valuable in its representation of women as well as men. The WLS cohort, born mainly in 1939, precedes by a few years the baby boom generation that has taxed social institutions and resources at each stage of life. The study can thus provide early indications of trends and problems that will become important as the larger group passes through its early 60s. Also, because the WLS is the first of the large, longitudinal studies of American adolescents, it provides the first large-scale opportunity to study the life course from late adolescence through the mid-60s in the context of a full record of ability, aspiration, and achievement.<sup>6</sup> The WLS graduates and their siblings have lived through major social changes: rising affluence, suburban growth, the decline of old ethnic cleavages, the cold war, and changing gender roles. The WLS overlaps the youngest cohorts that entered HRS in 1992, and this has provided opportunities to check the scope of our findings. Unlike the WLS, the HRS is nationally representative, but it does not cover the lives of respondents from adolescence to old age.

The WLS data also have obvious limitations. Some strata of American society are not represented. Everyone in the graduate sample completed high school. (Sewell and Hauser 1975) estimated that about 75% of Wisconsin youth graduated from high schools in the late 1950s; about 7% of siblings in the WLS did not graduate.<sup>7</sup> There are only a handful of African American, Hispanic, or Asian persons in the WLS. Given the minuscule share of minorities in Wisconsin when the WLS began, there is no way to remedy this omission. About 19% of the WLS sample is

of farm origin; this is consistent with national estimates in cohorts of the late 1930s. In 1964, 1975, and 1992, 70% of the sample lived in Wisconsin, but 30% lived elsewhere in the U.S. or abroad. The WLS graduates are homogeneous in age, but their siblings are not. Siblings range widely in age, mainly from 8 to 10 years older to 8 to 10 years younger than the graduates.

### **National Studies of the Life Course and Aging**

The HRS, MIDUS, NSFH, and ACL differ from the WLS in somewhat the same ways: All attempt to cover the entire U.S. population; all are presently of relatively short duration. Except HRS/AHEAD, they cover adults of all ages. Only NSFH provides rich (retrospective) data on early life circumstances, but it lacks the psychological measures in the WLS. Beyond these features, each study is unique in content and design, reflecting the interests of its leaders and research community.

Now that HRS has been combined with two older (AHEAD and CODA) cohorts, it provides continuing, biennial coverage of the U.S. population over the age of 50 in a sample of about 20,000 individuals. It is surely the flagship among large, long-term studies of aging. It covers spouses of married couples, and over-samples minorities and Floridians. HRS has also established links with data from the SSA, NDI, HCFA (Medicare), and employers. Coverage was excellent in the initial wave, and sample retention has been good across the first 8 years. Data cover cognition, self-reported health—with different emphases than the WLS, and a variety of attitudes and preferences, but there is far more emphasis on detailed economic data than in the WLS. Unlike the WLS, data on upbringing and on events before the age of 50 are retrospective or thin in HRS. Spousal reports provide important relational content, but there are no data from siblings or children. As with the WLS, bio-indicators have been obtained only on a pilot basis.

NSFH began with 13,017 persons aged 19 or more in 1987-88.<sup>8</sup> Wave 2 took place in 1992-93, and wave 3 is in the field. The response rate was 74% in the first wave, and 83% of survivors responded in wave 2. The total sample is quite large, and the data provide rich, self-

reported accounts of relationships among spouses, children, and parents. NSFH covers work experience, health, and well-being in less detail than the WLS. It provides similar data on family histories, social support, inter-household exchanges, and current labor force involvement, income sources, assets, and debt. However, there are few elders in NSFH—by comparison either to HRS or WLS—and the NSFH does not provide cognitive measures or relational data for adult siblings. The temporal window of observation in NSFH is wider than that of HRS—15 years vs. 9, and there are no plans to obtain bio-indicators.

ACL, like NSFH and MIDUS, is a sample of the adult household population.<sup>9</sup> The first (1986) wave achieved a response rate of 68% (N = 3,617). Responses were obtained for 83% of first wave participants in the second wave (1989) and for 83% of second wave participants in the third wave (1994). A fourth wave has been funded. ACL focuses on “productive” social relationships—on and off the job—and on cross-cultural variation in them. It has strong coverage of stressful events, chronic strains, and their effects on health, personal functioning, and productive activity. It also has excellent data on neighborhood contexts, spousal relationships, social support, and friendship. However, ACL contains relatively little information about early life circumstances, schooling, occupational histories, pensions, health, health insurance, or retirement.

MIDUS is a household-based, cross-sectional study of about 3500 adults in 1995 (oversampling those 45 and older), supplemented by 951 siblings (of 529 primary respondents), an independent sample of 1000 twin-pairs, and small oversamples in several metropolitan areas. The relational design is a great strength, but the first round response rate was unfortunately low (60.8% in the main sample), and persons with low levels of schooling were substantially under-represented. MIDUS has a very rich base of psychosocial assessments, focusing on midlife development and health, but it is weak in measures of adolescent development, educational history,

work history, marital history, intergenerational relationships, and financial status. A second round has been proposed to add a large array of bio-indicators and create a supplementary African-American sample from Milwaukee.

### **Tabular Comparisons of Study Design and Content**

We have constructed two tables that offer selected comparisons among WLS,<sup>10</sup> MIDUS, HRS, NSFH, and ACL.<sup>11</sup> Table 1 is a summary of design and content, which reports our assessments of study content – its quality and coverage – within several major areas. Table 2 provides supporting detail in each content area, and it is the major contribution of this paper. We have constructed Table 2 by reviewing questionnaires and other documentation available at each wave of each survey. Some surveys are covered in more detail than others in this edition of the table. For example, we have not yet distinguished among waves in HRS or NSFH, where almost all measures have been ascertained anew at each wave of the study. Also, we have not distinguished sources of information in MIDUS,<sup>12</sup> HRS, or NSFH, that is, whether data were ascertained from primary respondents or from spouses, siblings, or children. The present omission of these details implies that Table 2 understates the richness of relational data in those surveys.

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2. This effort was undertaken in connection with the preparation of a program of projects built around the Wisconsin Longitudinal Study, and the text reflects this focus, but we believe that the tabular comparison of study design and content may be of more general interest.
3. See <http://www.isr.umich.edu/src/psid/>.
4. The WLS cohort thus includes Milwaukee's "Class of '57," made famous by the much-repeated TV comedy, *Happy Days*. In 2002, Richie, Potsie, and Ralph would be 63 years old.
5. An additional randomly selected 20% of the siblings who had not been interviewed in 1977 were not interviewed by telephone because we ran out of money; 55% of these siblings responded to a modified mail survey.
6. There have, of course, been exceptionally important and influential longer-term studies of the life-course in the U.S. These reflect careful and insightful work, but they are based on small, local, or highly selected samples (Oden 1968; Elder 1974; Clausen 1993).
7. Because of its high response rates, we think that the WLS is less positively selected than most other large epidemiological studies of aging populations.
8. N = 9600, plus large over-samples of minorities and persons in households with one parent, step-children, cohabitators, and the recently married.
9. It over-samples Blacks, persons aged 60+, and spouses of married men aged 65+.
10. The WLS portion of the tables has been elaborated to distinguish between graduates and siblings and to report separately on the content of the Life History and Health at Midlife Study, which interviewed and obtained biomedical data from a small subsample of WLS graduates in 1997.
11. We consider this a work in progress, and we welcome corrections and suggestions for expansion of this summary material.
12. In MIDUS, the relational data are especially rich because the same instrument was used for primary respondents, twins, and other siblings.

**Table 1. Summary Comparisons of Surveys of the Life Course and Aging\***

|  | WLS Grads                                  | WLS Sib                                | Life History   | MIDUS   | HRS                     | NSFH   | ACL  |
|--|--|--|--|---|-------------------------|--|--|
| <b>SAMPLE</b>  |  |  |  |   |                         |  |  |
| <b>SAMPLE POPULATION</b>                                     | 1957 Senior Class of Wisconsin High School | Randomly selected sibling of WLS Grads | Selected from the WLS Grads (Not a random sample)  | National sample   | National Sample         | National Sample  | National but Hawaii and Alaska                                 |
| <b>SAMPLE SIZE</b>   | 10,317                                     | 2,429/7,230                            | 202  | 5676  | 15,497                  | 17,502   | 5355   |
| <b>BIRTH COHORT</b>  | 1939                                       | 1913-1965                              |  | 1921-1970   | 1931-1941               | 1968 and younger   | 1961 and younger   |
| <b>OVERSAMPLING</b>  | n.a.                                       | n.a.                                   | See WLS Grad. These 202 people were respondents to the WLS Grad surveys in 1957, 1964, 1975, and 1992. | oversampling persons 45 years and older, a handful of metropolitan sample, siblings (N = 951), twins (n = 1005) | Af.Am/Hispanic, Florida | Black, Mex, PR, hh of one-parent, hh of step-children, cohabitators, recently married. | oversampling black; over-represented wives of married men 65+. |
| <b>FIRST INTERVIEW</b>                                       |  |  |  |   |                         |  |  |
| <b>age</b>   | 18   | 28-78                                  | 56   | 25-74   | 51-61                   | 19+  | 25+  |
| <b>time</b>  | 1957                                       | 1977                                   | 1996   | 1995-6  | 1992                    | 1987   | 1986   |
| <b>DATA QUALITY</b>  |  |  |  |   |                         |  |  |
| <b>UNCONDITIONAL RESPONSE RATE</b>                           |  |  |  |   |                         |  |  |
| <b>baseline (first wave)</b>                                 | 100%                                       | 87.81%                                 | Pers. Intv. 60%<br>Bio. Intv. 31%  | 60.80%<br>(see footnote)  | 81.65%                  | 74.37%   | 68%  |
| <b>1st follow up</b>   | 87.09%                                     | 76.74%                                 | n.a.   | n.a.  | 74.33%                  | 60%  | 55.25%   |
| <b>2nd follow up</b>   | 90.09%                                     | n.a.                                   | n.a.   | n.a.  | 72.16%                  | n.a.   | 83% (see footnote)   |
| <b>3rd follow up</b>   | 87.18%                                     | n.a.                                   | n.a.   | n.a.  | 80.4%(see footnote)     | n.a.   | n.a.   |
| <b>4th follow up</b>   | n.a.                                       | n.a.                                   | n.a.   | n.a.  | Not available.          | n.a.   | n.a.   |
| <b>TIME OF OBSERVATION</b>                                   | 1957/64/75/92                              | 1977/94                                | 1957/64/75/92/96   | 1995  | 1992/94/96/98           | 1987/92-94   | 1986/98/94   |
| <b>DURATION OF OBSERVATION</b>                               | 35 yrs                                     | 17 yrs                                 | 39 yrs   |   | 6 yrs                   | 6 yrs  | 8 yrs  |
| <b>RELATIONAL DATA</b>                                       |  |  |  |   |                         |  |  |
| <b>siblings</b>  | x  | x                                      | x  | x   |                         |  |  |
| <b>spouse</b>  | x  | x                                      | x  |   | x                       | x  | x  |
| <b>friend network</b>  | x  | x                                      | x  |   |                         |  |  |
| <b>children</b>  |  |  |  |   |                         | x  |  |
| <b>MULTI-LEVEL DATA</b>                                      |  |  |  |   |                         |  |  |
| <b>household/family</b>                                      | x  | x                                      | x  | x   | x                       | x  | x  |
| <b>school</b>  | x  | x                                      | x  |   |                         |  |  |
| <b>PUBLIC/GOV RECORD LINK</b>                                |  |  |  |   |                         |  |  |
| <b>Social Security</b>                                       | x  | x                                      | x  |   | x                       |  |  |
| <b>Tax Record</b>  | x  | x                                      | x  |   |                         |  |  |
| <b>School Record</b>   | x  | x                                      | x  |   |                         |  |  |
| <b>NDI</b>   | x  | x                                      | x  |   |                         | x  |  |
| <b>Employer Pension Study</b>                                |  |  |  |   |                         | x  |  |
| <b>DATA CONTENT</b>  |  |  |  |   |                         |  |  |
| <b>FAMILY ORIGIN</b>   | Excellent                                  | Excellent                              | Excellent  | Good  | Acceptable              | Good   | Acceptable   |
| <b>PARENTING STYLE AND CHILDHOOD FAMILY RELATIONSHIP</b>     | Good                                       | Excellent                              | Excellent  | Good  | None                    | Excellent  | Good   |
| <b>EARLY HEALTH ENVIRONMENT &amp; FAMILY MEDICAL HISTORY</b> | Good                                       | Good                                   | Good   | Good  | None                    | Good   | None   |
| <b>EARLY ABILITY/ACHIEVEMENT</b>                             | Excellent                                  | Acceptable                             | Excellent  | None  | None                    | Acceptable   | None   |
| <b>EARLY AMBITIONS/ASPIRATION</b>                            | Excellent                                  | Acceptable                             | Excellent  | None  | None                    | Poor   | None   |
| <b>GEOGRAPHIC INFORMATION</b>                                | Excellent                                  | Excellent                              | Excellent  | Acceptable  | None                    | Excellent  | Poor   |

|   | WLS Grads  | WLS Sib    | Life History | MIDUS      | HRS        | NSFH       | ACL        |
|---|------------|------------|--------------|------------|------------|------------|------------|
| <b>EDUCATION</b>  | Excellent  | Good       | Excellent    | Poor       | Acceptable | Acceptable | Poor       |
| <b>LFP/EMPLOYMENT/WORK</b>                              | Excellent  | Good       | Excellent    | Poor       | Poor       | Poor       | Poor       |
| <b>MILITARY SERVICE</b>                                 | Excellent  | Good       | Excellent    | None       | Poor       | Acceptable | None       |
| <b>INCOME</b>   | Good       | Good       | Good         | Acceptable | Excellent  | Excellent  | Good       |
| <b>FINANCIAL SITUATION AND INTERTRANSFER</b>            | Excellent  | Excellent  | Excellent    | Poor       | Excellent  | Excellent  | Poor       |
| <b>ASSETS AND WEALTH</b>                                | Excellent  | Excellent  | Excellent    | Poor       | Excellent  | Excellent  | Poor       |
| <b>HOUSING AND NEIGHBORHOOD</b>                         | None       | None       | Poor         | Acceptable | Good       | Poor       | Excellent  |
| <b>PENSION AND HEALTH INSURANCE</b>                     | Good       | Good       | Good         | Poor       | Excellent  | Poor       | Poor       |
| <b>RETIREMENT AND FUTURE (see JOB section for more)</b> | Good       | Good       | Good         | Poor       | Excellent  | Poor       | Good       |
| <b>MARRIAGE/COHABITATION (see also INTIMATE REL)</b>    | Excellent  | Excellent  | Excellent    | Good       | Excellent  | Excellent  | Good       |
| <b>SPOUSE(S)/INTIMATE PARTNER (R's report only)</b>     | Excellent  | Excellent  | Excellent    | Good       | Excellent  | Excellent  | Poor       |
| <b>FERTILITY OR CHILDREN ROSTER</b>                     | Excellent  | Good       | Excellent    | Good       | Excellent  | Excellent  | Excellent  |
| <b>SELECTED (FOCAL) CHILD</b>                           | Excellent  | Good       | Excellent    | None       | None       | Excellent  | None       |
| <b>PARENTS (OWN; IN-LAWS)</b>                           | Excellent  | Excellent  | Excellent    | Poor       | Excellent  | Excellent  | Acceptable |
| <b>SIBLINGS</b>   | Excellent  | Poor       | Excellent    | Poor       | Excellent  | Excellent  | None       |
| <b>SELECTED SIBLING</b>                                 | Excellent  | Excellent  | Excellent    | Excellent  | Good       | None       | None       |
| <b>HOUSEHOLD MEMBERS</b>                                | Excellent  | Excellent  | Excellent    | Poor       | Excellent  | Excellent  | Excellent  |
| <b>FRIENDS</b>  | Excellent  | None       | Excellent    | None       | None       | None       | Excellent  |
| <b>COGNITIVE FUNCTION/MENTAL ABILITY</b>                | Excellent  | Excellent  | Excellent    | None       | Good       | None       | Good       |
| <b>PERSONALITY</b>                                      | Good       | Good       | Good         | Excellent  | None       | None       | Acceptable |
| <b>OTHER PSYCHOLOGICAL MEASURES</b>                     | Good       | Good       | Good         | Excellent  | None       | Good       | Acceptable |
| <b>ATTITUDES, BELIEFS, PRIORITIES</b>                   | Acceptable | Acceptable | Acceptable   | Excellent  | None       | Acceptable | Good       |
| <b>PERCEIVED DISCRIMINATION, IDENTITY</b>               | None       | None       | Acceptable   | Excellent  | None       | None       | Poor       |
| <b>RELIGION</b>   | Good       | Good       | Excellent    | Excellent  | Poor       | Good       | Excellent  |
| <b>RELATIONSHIP WITH SPOUSE/PARTNER</b>                 | Poor       | Poor       | Good         | Excellent  | Poor       | Excellent  | Excellent  |
| <b>HOUSEHOLD WORK</b>                                   | None       | None       | None         | Poor       | None       | Good       | Excellent  |
| <b>SEXUALITY AND SEXUAL RELATIONSHIP</b>                | None       | None       | Poor         | Excellent  | None       | Good       | None       |
| <b>WIDOWHOOD</b>  | None       | None       | None         | None       | Good       | Good       | Good       |
| <b>CLOSENESS AND SIMILAR VIEWS WITH FAMILY</b>          | Excellent  | Excellent  | Excellent    | None       | None       | Excellent  | None       |
| <b>SOCIAL COMPARISON TO FAMILY</b>                      | Excellent  | Excellent  | Excellent    | None       | Poor       | Good       | None       |
| <b>SOCIAL SUPPORT ( also see CAREGIVING)</b>            | Good       | Good       | Good         | None       | Poor       | Good       | Excellent  |
| <b>CAREGIVING, SOCIAL CONTACT AND ACTIVITIES</b>        | Excellent  | Excellent  | Excellent    | Poor       | Poor       | Excellent  | Poor       |
| <b>LIFE EVENT INVENTORY</b>                             | Poor       | Poor       | Good         | Acceptable | Poor       | Acceptable | Excellent  |
| <b>PHYSICAL/MENTAL HEALTH</b>                           |            |            |              |            |            |            |            |
| <b>Health Perception and Comparison</b>                 | Good       | Excellent  | Good         | Excellent  | Acceptable | Acceptable | Good       |
| <b>Bio-Markers</b>                                      | None       | None       | Excellent    | None       | Poor       | None       | None       |
| <b>Neurophysiological measures</b>                      | None       | None       | Excellent    | None       | None       | None       | None       |
| <b>Hand usage</b>                                       | None       | None       | Excellent    | None       | None       | None       | None       |
| <b>Functional Status</b>                                | Acceptable | Acceptable | Acceptable   | Acceptable | Good       | Good       | Poor       |
| <b>Diseases, Illnesses, and Medical Conditions</b>      | Good       | Good       | Good         | Good       | Good       | Acceptable | Acceptable |
| <b>Physical Symptoms</b>                                | Excellent  | Excellent  | Excellent    | Excellent  | Poor       | Poor       | Poor       |
| <b>Body Size</b>  | Good       | Good       | Excellent    | Excellent  | Good       | Good       | Good       |
| <b>NUTRITION INFORMATION</b>                            | None       | None       | None         | None       | None       | None       | None       |
| <b>MENTAL HEALTH</b>                                    |            |            |              |            |            |            |            |
| <b>General mental/emotional health</b>                  | None       | None       | Good         | Good       | Good       | None       | None       |
| <b>Stress</b>   | Good       | Good       | Good         | Excellent  | None       | Good       | None       |
| <b>Depression</b>                                       | Excellent  | Excellent  | Excellent    | Excellent  | Acceptable | Acceptable | Good       |
| <b>Medical Treatment and Drugs</b>                      | None       | None       | Acceptable   | Good       | Excellent  | None       | None       |
| <b>Hospitalization</b>                                  | Good       | Good       | Good         | None       | Good       | None       | Acceptable |
| <b>Physical Exams Reported</b>                          | Poor       | Good       | Good         | Poor       | None       | None       | None       |
| <b>Other Health Service Utilization</b>                 | None       | None       | Poor         | Excellent  | Excellent  | None       | Poor       |
| <b>WOMEN'S REPRODUCTIVE HEALTH AND MENOPAUSE</b>        | Good       | Excellent  | Good         | Good       | None       | None       | None       |
| <b>ALCOHOL/DRINKING</b>                                 | Good       | Good       | Excellent    | Good       | Acceptable | Acceptable | Acceptable |
| <b>SMOKING</b>  | Good       | Excellent  | Excellent    | Excellent  | Good       | Excellent  | Good       |
| <b>EXERCISE</b>   | Acceptable | Acceptable | Acceptable   | Acceptable | Acceptable | None       | Poor       |
| <b>SLEEP</b>  | Acceptable | Acceptable | Acceptable   | Acceptable | None       | None       | Good       |

|                        | <b>WLS Grads</b> | <b>WLS Sib</b> | <b>Life History</b> | <b>MIDUS</b> | <b>HRS</b> | <b>NSFH</b> | <b>ACL</b> |
|------------------------|------------------|----------------|---------------------|--------------|------------|-------------|------------|
| <b>THE END OF LIFE</b> | Excellent        | Excellent      | None                | None         | Excellent  | Good        | None       |

|  | WLS Grads | WLS Sib | Life History | MIDUS | HRS | NSFH | ACL |
|--|-----------|---------|--------------|-------|-----|------|-----|
| <b>*We consider this a work in progress, and we welcome corrections and suggestions for expansion of this summary material.</b>  |           |         |              |       |     |      |     |
| NOTES  |           |         |              |       |     |      |     |
| 1. Duration/Time of Observation  |           |         |              |       |     |      |     |
| The duration of observation is measured by the time between the first observation/interview and the most recent one reported here. The most recent observation/interview is defined by the data we can obtain through ICPSR or other sources. For example, though ACL 1994 is not available through ICPSR, we are able to obtain a copy of the questionnaire and to report it in the table. However, we do not include HRS 2000 here.  |           |         |              |       |     |      |     |
| 2. MIDUS sibling and twin sample   |           |         |              |       |     |      |     |
| Up through June 2001, we could not find any documents released to the public regarding the twin and sibling samples. From the documents in ICPSR and the Harvard public health school, sample size and data content are the only available information.  |           |         |              |       |     |      |     |
| 3. MIDUS response rate   |           |         |              |       |     |      |     |
| There are 4464 eligible persons in the screened sample. It is estimated that 1212 persons are eligible in the sample of screening not completed. The total eligible sample size is 5676. The unweighted actual interviewed sample size is 3485. The response rate of 60.8 percent is reported in the technical report documenting the MIDUS survey (METHODOLOGY OF THE NATIONAL SURVEY OF MIDLIFE DEVELOPMENT IN THE UNITED STATES (MIDUS)), which is available on the MIDUS website. <a href="http://midmac.med.harvard.edu/research.html#res1">http://midmac.med.harvard.edu/research.html#res1</a> According to that report, it is not possible to calculate a response rate with a ratio of completions to selected cases because some refusals took place <u>before</u> sample selection, so the actual denominator could only be estimated.  |           |         |              |       |     |      |     |
| 4. ACL response rate   |           |         |              |       |     |      |     |
| There are 4994 eligible persons in the original sample, including black oversample from national black supplement sample. Additionally, there are 361 eligible wives in households with husbands older than 65. The total eligible sample size is 5355. The actual sample size is 3617. The unconditional response rate is 68%. However, in the second wave, ACL only tried to interview respondents from the first wave. With 166 deaths and 584 refusals, the response rate is 83%. Since we use the original eligible sample as the denominator, the unconditional response rate would be 55.3%, i.e., (3617-166-584)/(5355-166). The response rate for the third wave (1994) was provided by Stephanie Robert.   |           |         |              |       |     |      |     |
| 5. HRS sample/questionnaire design   |           |         |              |       |     |      |     |
| In addition to the age-eligible samples of 1931-1941 birth year cohorts in the baseline survey, HRS also interviewed and followed up their spouses or partners regardless of their age. The questionnaires for the age-eligible members and their partners are identical. The general rule for the follow-up sample is that if the relationship has ended before the following survey, then interviews are requested with both the sample member and the original spouse or partner as well as the new spouse or partner of either of them at the time of the following wave (the new spouse or partner is followed up only until he/she no longer lives with the sample member and is found to be married to or living with someone else). Thus, as of HRS98 interviews were asked to all respondents in the baseline survey, although there was a slight exception for this rule at the third wave of HRS. |           |         |              |       |     |      |     |
| 6. HRS Response Rates:   |           |         |              |       |     |      |     |
| There were 11,522 respondents re-interviewed in 1994, including 177 exit reports. With 233 deaths confirmed, the unconditional response rate is 74.32%, i.e., (11522-177)/(15497-233). There were 11,377 respondents reinterviewed in 1996, including 413 exit reports (177 from 1994). With 515 deaths confirmed but 109 new spouses from 1994, the 'unconditional' response rate is 72.16%, i.e., (11377-413)/(15497+109-413). For response rate in 1998, please check HRS technical report at <a href="http://www.umich.edu/~hrswww/studydet/techdet/sample.html">http://www.umich.edu/~hrswww/studydet/techdet/sample.html</a> . Note the official response rates reported by HRS include exit reports on the deceased and all new spouses.  |           |         |              |       |     |      |     |
| 7. NSFH sample/questionnaire design  |           |         |              |       |     |      |     |
| For NSFH1 (1987-88) an interview with one adult per household who was randomly selected as the primary respondent, was conducted as well as a self-administrated questionnaire. In addition, the spouse or cohabiting partner of the primary respondent was also asked with a self-administered questionnaire. In 1992-94 NSFH2, the original NSFH samples were reinterviewed. Not only the current spouse or cohabiting partner but also the original spouse or partner with whom the primary respondent no longer lived were interviewed with an almost identical questionnaire as the main respondent. Furthermore, NSFH2 conducted a telephone interview with "focal children" of age 10-17 and age 18-23 at the survey as well as a randomly selected parent of the main respondent.  |           |         |              |       |     |      |     |
| 8. Relational Data   |           |         |              |       |     |      |     |
| Relational Data include siblings, parent-child, spouse, and friends. Spousal relational data are inherited in household data. WLS has more than 200 original 1957 graduates whose spouses are also in the sample. WLS siblings are selected randomly from the sibling roster. We cannot find any report on the selection methods of MIDUS twin and sibling sample, except that MIDUS twins are a national sample and different from the MIDUS main and sibling sample.   |           |         |              |       |     |      |     |

**Table 2. Detailed Comparisons of Surveys of the Life Course and Aging\***

|   | WLS Grads      | WLS Sib       | Life History      | MIDUS               | HRS        | NSFH             | ACL |
|---|----------------|---------------|-------------------|---------------------|------------|------------------|-----|
| <b>FAMILY ORIGIN</b>  |                |               |                   |                     |            |                  |     |
| Nationality   |                |               |                   | 95                  | x          | x                | 86  |
| Race/Ethnicity  | 57             | 77/94         | 57                | 95                  | x          | x                | 86  |
| parental nationality  | 75             | 77            | 75                | 95                  |            |                  | 86  |
| grandparental nationality   |                |               |                   |                     |            |                  | 86  |
| parental education  | 57/75          | 77(age 16)/94 | 57/75             | 95                  | x          | x                | 89  |
| parental employment   | 57/75          | 77(age 16)/94 | 57/75             | 95                  |            | x                |     |
| parental occupation   | 57/75          | 77(age 16)/94 | 57/75             | 95                  |            | x                |     |
| father as an union member   | 75             | 77            | 75                |                     |            |                  |     |
| family income   | 57(Wisc)/75    |               | 57(Wisc)/75       |                     |            |                  |     |
| on welfare  |                |               |                   | 95                  |            | x                |     |
| perceived family financial status in childhood  |                |               |                   | 95                  |            |                  | 89  |
| parental assessment on family wealth in community                                       | 57             |               | 57                |                     |            |                  |     |
| residential area (size, geocode)  | 57/64/70/75/92 | 77/94         | 57/64/70/75/92/96 |                     |            | x                |     |
| family religion/religiosity   | 75             |               | 75                |                     |            | x                |     |
| twin  | 75             | 77/94         | 75                | 95                  |            |                  |     |
| birth order   | 75             | 77/94         | 75                | 95                  | x          | x                |     |
| number of siblings  | 75/92          | 77/94         | 75/92             | 95                  | x          | x                |     |
| all siblings (age, sex, education)  | 75/92          |               | 75/92             |                     | x(not edu) |                  |     |
| language spoken in home   |                |               |                   | 95 (English or not) |            |                  |     |
| <b>(also see sections EARLY HEALTH ENVIRONMENT/FAMILY MEDICAL HISTORY, AND PARENTS)</b> |                |               |                   |                     |            |                  |     |
| <b>PARENTING STYLE AND CHILDHOOD FAMILY RELATIONSHIP</b>                                |                |               |                   |                     |            |                  |     |
| family structure  | 75/92          | 77/94         | 75/92             | 95                  |            | x                | 89  |
| age at family disruption  |                |               |                   | 95                  |            | x                | 89  |
| parental marital problem  | 94             | 94            | 96                |                     |            | x (see footnote) | 89  |
| experience of leaving parental hh   |                |               |                   |                     |            | x                | 89  |
| living arrangement with biological/step parents   |                |               | 96                |                     |            | x                |     |
| close to any adult in the hh, if separated from parents                                 |                |               |                   |                     |            |                  | 89  |
| < 16 work to support family: age, hrs of work   |                |               |                   |                     |            |                  | 89  |
| shy as a child  |                |               |                   |                     |            |                  | 89  |
| affection display among parents and siblings  | 94             | 94            | 96                |                     |            |                  |     |
| autonomy in childhood   | 94             | 94            | 96                | 95 (rules)          |            |                  |     |
| positive relationship among parents and siblings  | 94             | 94            | 96                |                     |            |                  |     |
| physical abuse among parents and siblings   | 94             | 94            | 96                |                     |            | x                |     |
| verbal abuse among parents and siblings   | 94             | 94            | 96                | 95                  |            | x                |     |
| emotional abuse among parents and siblings  |                |               | 96                |                     |            |                  |     |
| perceived drinking problem: who (up to 3)   |                |               |                   |                     |            | x                | 89  |
| perceived violence: who (up to 3)   |                |               |                   |                     |            | x                | 89  |
| perceived mental problem: who (up to 3)   |                |               |                   |                     |            | x                | 89  |
| perceived mother's personality/characters   |                |               | 96                | 95                  |            | x (see footnote) |     |
| perceived relationship with mother (closeness, confiding, affection, attention)         |                |               | 96                | 95                  |            | x (see footnote) |     |
| perceived parenting from mother (rule, strict, consistent, harsh)                       |                |               |                   | 95                  |            | x (see footnote) |     |
| perceived parenting from mother (caring, overprotecting)                                |                |               | 96                |                     |            |                  |     |
| perceived father's personality/characters   |                |               |                   | 95                  |            | x (see footnote) |     |
| perceived relationship with father (closeness, confiding, affection, attention)         |                |               | 96                | 95                  |            | x (see footnote) |     |
| perceived parenting from father (rule, strict, consistent, harsh)                       |                |               | 96                | 95                  |            | x (see footnote) |     |
| perceived parental health (mental & physical)   |                |               | 96                |                     |            |                  |     |
| housework sharing as a child  |                |               |                   | 95                  |            | x (see footnote) |     |

|  | WLS Grads      | WLS Sib        | Life History   | MIDUS          | HRS      | NSFH             | ACL |
|--|----------------|----------------|----------------|----------------|----------|------------------|-----|
| <b>EARLY HEALTH ENVIRONMENT AND FAMILY MEDICAL HISTORY</b>     |                |                |                |                |          |                  |     |
| smokers  | 94             | 94             | 94             |                |          | x (see footnote) |     |
| drinking problems  | 94             | 94             | 94             |                |          | x (see footnote) |     |
| family history of heart attack                                 |                |                |                | 95             |          |                  |     |
| perceived bio-parental health status at age 16                 |                |                |                | 95             |          |                  |     |
| A585perceived (bio) parental health at age 16                  |                |                |                | 95             |          |                  |     |
| <b>EARLY ABILITY/ACHIEVEMENT</b>                               |                |                |                |                |          |                  |     |
| school performance   | 57             |                | 57             |                |          | x (see footnote) |     |
| academic program(s)  | 57             |                | 57             |                |          |                  |     |
| academic program(s): reported by parents                       | 57             |                | 57             |                |          | x (see footnote) |     |
| IQ   | 57 (Wisconsin) | 77 (Wisconsin) | 57 (Wisconsin) |                |          |                  |     |
| <b>EARLY AMBITIONS/ASPIRATION</b>                              |                |                |                |                |          |                  |     |
| post high school plan  | 57/75          |                | 57/75/96       |                |          |                  |     |
| post high school, educational plan                             | 57/75          | 77 (age 16)    | 57/75/96       |                |          |                  |     |
| post high school, work plan                                    | 57             |                | 57             |                |          |                  |     |
| post high school, family/marriage plan                         | 57             |                | 57             |                |          | x (see footnote) |     |
| post high school, military plan                                | 57             |                | 57             |                |          |                  |     |
| educational asp/expectation                                    | 57/75          |                | 57/75/96       |                |          | x (see footnote) |     |
| occupational asp/expectation                                   | 57/75          | 77 (at 16)/94  | 57/75/96       |                |          |                  |     |
| value of college education                                     | 57             |                | 57             |                |          |                  |     |
| perceived parental encouragement/expectation                   | 57/75/94       | 77 (at 16)/94  | 57/75/94       |                |          | x (see footnote) |     |
| perceived parental support on higher education                 | 57/75          |                | 57/75          |                |          | x (see footnote) |     |
| perceived peer's influence                                     | 57/75          |                | 57/75          |                |          |                  |     |
| perceived teacher's influence                                  | 57/75          |                | 57/75          |                |          |                  |     |
| parental expectation on education                              | 57             |                | 57             |                |          |                  |     |
| reasons: not expecting further education for R                 | 57             |                | 57             |                |          |                  |     |
| parental attitude on college education (multiple items)        | 57             |                | 57             |                |          |                  |     |
| parental expectation on job/work/occupation                    | 57             |                | 57             |                |          |                  |     |
| parental involvement on college plan (parent)                  | 57             |                | 57             |                |          |                  |     |
| parental involvement on college plan (respondent)              | 57             |                | 57             |                |          |                  |     |
| teacher's evaluation (only outstanding students)               | 57             |                | 57             |                |          |                  |     |
| contact teachers for college plan                              | 57             |                | 57             |                |          |                  |     |
| unfulfilled occ asp at teen and its consequences               |                |                | 96             |                |          |                  |     |
| <b>GEOGRAPHIC INFORMATION</b>                                  |                |                |                |                |          |                  |     |
| residence at interviews: geo codes                             | 57/64/75/92    | 77/92          | 57/64/75/92    |                | x(state) | x                |     |
| residence at interviews: city size                             | 57/64/75/92    | 77/92          | 57/64/75/92    |                |          | x                |     |
| residence at interviews: Urban/rural                           | 57/64/75/92    | 77/92          | 57/64/75/92    |                |          | x                |     |
| residence at interviews: SMSA                                  | 57/64/75/92    | 77/92          | 57/64/75/92    |                |          | x                |     |
| month and year in which R began living in this place           |                |                |                |                |          | x                |     |
| residence while growing up                                     | 57             | 77/92          | 57             | 95 (size only) |          | x (at 16)        | 86  |
| residence right after birth                                    |                |                |                |                |          | x                |     |
| # of moving  |                |                |                | 95 (childhood) |          |                  |     |
| # of moving since Jan '82                                      |                |                |                |                |          | x                |     |
| recent moving: time  |                |                |                |                |          |                  | 94  |
| self-assessment of curr neighborhood (see SOCIAL RELATIONSHIP) |                |                |                | 95             |          | x                |     |

|  | WLS Grads          | WLS Sib         | Life History       | MIDUS | HRS        | NSFH             | ACL                  |
|--|--------------------|-----------------|--------------------|-------|------------|------------------|----------------------|
| <b>SOCIOECONOMIC LIFE</b>  |                    |                 |                    |       |            |                  |                      |
| <b>EDUCATION</b>   |                    |                 |                    |       |            |                  |                      |
| educational plan/asp at teen (see EARLY AMBITIONS)   | 57/75              | 77 (age 16)     | 57/75              |       |            | x (see footnote) |                      |
| significant other's expectation/encouragement<br>(see EARLY AMBITIONS and EARLY ACHIEVEMENT) | 57/75              | 94              | 57/75              |       |            | x (see footnote) |                      |
| formal education history   | 64/75/92           | 77/94           | 64/75/92           |       | x          | x                |                      |
| high school performance  | 57 (official/self) |                 | 57 (official/self) |       |            | x (see footnote) |                      |
| high school program/courses  | 57                 |                 | 57                 |       |            |                  |                      |
| college preparation (tests)  | 57                 |                 | 57                 |       |            |                  |                      |
| financial preparation  | 57                 |                 | 57                 |       |            |                  |                      |
| college application  | 57                 |                 | 57                 |       |            |                  |                      |
| college program(s)   | 57/64/75/92        | 77/94           | 57/64/75/92        |       |            |                  |                      |
| degrees  | 64/75/92           | 77/94           | 64/75/92           |       | x          | x                |                      |
| educational attainment   | 64/75/92           | 77/94           | 64/75/92           | 95    | x          | x                | 86                   |
| schooling history  | 64/75/92           | --(constructed) | 64/75/92           |       |            | x                |                      |
| school/college characteristics   | 64/75/92           | 77/94           | 64/75/92           |       |            |                  |                      |
| continuing education   | 64/75/92           | 77/94           | 64/75/92           |       |            |                  |                      |
| on job training  | 75/92              | 77/94           | 75/92              |       | x          |                  |                      |
| vocational/occupational education  | 64/75/92           | 77/94           | 64/75/92           |       |            | x                |                      |
| military education/training  | 75                 |                 | 75                 |       |            |                  |                      |
| perceived educational success  | 92                 | 94              | 92                 |       |            |                  |                      |
| value of education   | 57                 | 94              | 57                 |       |            |                  |                      |
| <b>Labor Force Participation/EMPLOYMENT/WORK</b>   |                    |                 |                    |       |            |                  |                      |
| post high school job plan  | 57                 |                 | 57                 |       |            |                  |                      |
| occ expectation/asp (see EARLY AMBITION)   | 57/75/92           |                 | 57/75/92/96        |       |            |                  |                      |
| occupational asp 10 years later, at interviews   | 75/92              | 77/94           | 75/92/96           |       |            |                  |                      |
| unfulfilled occ asp at teen and its consequences   |                    |                 | 96                 |       |            |                  |                      |
| unfulfilled occ asp at age 35 and its consequences   |                    |                 | 96                 |       |            |                  |                      |
| current LFP/major activities   | 64/75/92           | 77/94           | 64/75/92/96        | 95    | x          | x                | 86/89/94 (wks,hr/wk) |
| LFP history  | 64/75/92           | 94              | 64/75/92/96        |       | x(partial) | x                |                      |
| LFP 1985-95  | 75/92              | 94              | 75/92/96           | 95    |            |                  |                      |
| Out of LF longest: duration, reason  |                    |                 |                    | 95    |            |                  |                      |
| laid off/unemployed/looking for job, last 10yrs  |                    |                 |                    |       | x          |                  |                      |
| LF activities in weeks, last year  |                    |                 |                    | 95    |            |                  |                      |
| LFP and fertility (women only)   | 75 (up to 1974)    | 77 (up to 1976) | 75 (up to 1974)    |       |            | x                |                      |
| job/occ history  | 64/75/92           | 94              | 64/75/92/96        |       | x(partial) |                  |                      |
| first job  | 75/92              | 77/94           | 75/92              |       |            |                  |                      |
| first job: age   | 75/92              | 77/94           | 75/92              | 95    |            |                  |                      |
| first job: occupation  | 75/92              | 77/94           | 75/92              |       |            |                  |                      |
| first full-time employment: age  | 75/92              | 77/94           | 75/92              | 95    |            | x                |                      |
| first full-time employment: occ  | 75/92              | 77/94           | 75/92              |       |            |                  |                      |
| job/occ at 1970  | 75/92              | 77/94           | 75/92              |       |            |                  |                      |
| job/occ one year ago, at interviews  | 75/92              | 77/94           | 75/92              |       |            | x                |                      |
| job/occ at age 50 (for R over age 60)  |                    |                 |                    |       |            | x                |                      |
| cur/last job/occ   | 64/75/92           | 77/94           | 64/75/92/96        | 95    | x          | x                | 86/89/94             |
| all jobs: occupation   | 75/92              |                 | 75/92              |       |            |                  |                      |
| all jobs: industry   | 75/92              |                 | 75/92              |       |            |                  |                      |
| all jobs: ft/pt  | 75/92              |                 | 75/92              |       |            | x                |                      |
| all jobs: on job training  | 92                 |                 | 92                 |       |            |                  |                      |
| all jobs: reason(s) to quit  | 92                 |                 | 92/96              |       |            |                  |                      |
| all jobs: company/employer   | 92                 |                 | 92                 |       |            |                  |                      |
| all jobs: union membership   | 92                 |                 | 92                 |       |            |                  |                      |
| all jobs: health insurance   | 92                 |                 | 92                 |       |            |                  |                      |
| cur/last job: hours of work (a week)   | 75/92              | 77/94           | 75/92/96           | 95    | x          | x                | 86/89/94             |
| cur/last job: industry   | 64/75/92           | 77/94           | 64/75/92/96        |       | x          | x                | 86/89/94             |

|   | WLS Grads | WLS Sib | Life History | MIDUS        | HRS         | NSFH | ACL                          |
|---|-----------|---------|--------------|--------------|-------------|------|------------------------------|
| cur/last job: wage  | 75/92     | 77/94   | 75/92        |              | x           | x    | 86/89/94                     |
| cur/last job: salary  | 75/92     | 77/94   | 75/92        |              | x           | x    | 86/89/94                     |
| cur/last job: tenure  | 75/92     | 77/94   | 75/92/96     |              |             |      | 89/94 (cur)                  |
| cur/last job: 2nd job   | 92        |         | 92           |              | x           | x    | 86/89                        |
| cur/last job: work schedule   |           |         |              | 95           | x           | x    |                              |
| cur/last job: company characteristics   | 75/92     | 94      | 75/92        |              |             |      |                              |
| cur/last job: pension plan  | 92        | 94      | 92           |              | x           |      |                              |
| cur/last job: job characteristic  | 75/92     | 77/94   | 75/92/96     | 95 (limited) |             |      | 86/89 (20+hrs), 94 (limited) |
| cur/last job: Wright's items  | 75/92     |         | 75/92/96     |              |             |      |                              |
| cur/last job: index of job desirability   | 75/92     | 77/94   | 75/92        |              |             |      |                              |
| cur/last job: job satisfaction (in general)   | 75/92     | 77/94   | 75/92/96     |              | x           |      | 86/89/94                     |
| cur/last job: job satisfaction (in specific characteristics)  | 75        |         | 75           |              |             |      |                              |
| cur/last job: job enjoyment   |           |         |              |              |             |      | 86/89/94                     |
| cur/last job: job security  | 75/92     | 94      | 75/92        | next 2 yrs   | x (next yr) |      | 86/89                        |
| cur/last job: union or employee-assoc   | 75/92     | 77/94   | 75/92        |              | x           |      |                              |
| cur/last job: self-assessment of job  |           |         |              |              | x           |      | 86/89/94                     |
| cur/last job: boring/not apprec, freq bothered (only applied to 20+ hrs and housekeeping)           |           |         |              |              |             |      | 86/89/94                     |
| cur/last job: occupational hazard (type, frequency)   | 92        | 94      | 92/96        |              |             |      |                              |
| cur/last job: job search activities   | 75/92     | 77/94   | 75/92        |              |             |      |                              |
| cur/last job: impact on physical/mental health  | 92        |         | 92           | 95           |             |      |                              |
| importance of work in general   | 75/92     | 77/94   | 75/92        |              |             |      |                              |
| importance of money in work (whether work, if not for pay)  | 75/92     | 77/94   | 75/92        |              | x           |      |                              |
| perceived success in work   | 92        | 94      | 92/96        |              |             |      |                              |
| perceived benefited/worse off for others  |           |         |              |              |             |      | 86/89                        |
| perceived worse/worse off for r   |           |         |              |              |             |      | 86                           |
| want to work more or to work less   |           |         |              |              |             |      | 86/89                        |
| want to work more or to work less: why (2 reasons)  |           |         |              |              |             | x    | 89                           |
| ideal number of work hours  |           |         |              |              |             | x    | 94                           |
| work life: best/worse parts (why important)   |           |         | 96           |              |             |      |                              |
| work life: successful? (why)  |           |         | 96           |              |             |      |                              |
| work life: one major change, if possible (why)+A260   |           |         | 96           |              |             |      |                              |
| time to work  |           |         |              | 95           |             | x    |                              |
| time for traveling to work  |           |         |              | 95           |             | x    |                              |
| job/family stress spill over (see MENTAL HEALTH)  | 92        | 94      | 92/96        | 95           |             | x    |                              |
| harassment/discrimination at work (type, harasser, grievance, complaints, resolution, satisfaction) |           | 94      | 96           |              |             |      |                              |
| difficulties in work  |           |         |              | 95           |             |      | 86/89 (3yrs)                 |
| work/occ hazard to health: ever, # of times   |           |         |              |              |             |      | 94                           |
| supports from or relationship with supervisor/co-workers  |           |         |              | 95           |             |      |                              |
| keeping house (see HOUSEHOLD WORK)  |           |         |              |              |             |      | 86/89/94                     |
| irregular work past 12 mos: time  |           |         |              |              |             |      | 86/89/94                     |
| irregular work past 12 mos: enjoyment   |           |         |              |              |             |      | 86/89/94                     |
| irregular work past 12 mos: satisfaction  |           |         |              |              |             |      | 86/94                        |
| irregular work past 12 mos: better/worse off for R and others                                       |           |         |              |              |             |      | 86/89/94                     |
| irregular work past 12 mos: better/worse off for others   |           |         |              |              |             |      | 86/94                        |
| irregular work past 12 mos: like to do more?  |           |         |              |              |             |      | 86                           |
| irregular work past 12 mos: perceived more in 5 yrs   |           |         |              |              |             |      | 86                           |
| curr looking for another job  |           |         |              |              | x           |      |                              |
| job search activity to find another job   |           |         |              |              | x           |      |                              |
| if found out a job like the curr job, will look into it?  |           |         |              |              | x           |      |                              |
| reasons not to work   | 75/92     | 77/94   | 75/92        |              |             |      | 86/89/94                     |
| reasons not getting good jobs in life   |           |         |              |              |             |      | 86                           |
| reasons to work (for 55+)   |           |         |              |              |             |      | 89                           |
| work/employment plan 10 years later   | 75/92     | 77/94   | 75/92        |              |             |      |                              |

|  | WLS Grads | WLS Sib | Life History | MIDUS | HRS | NSFH | ACL      |
|--|-----------|---------|--------------|-------|-----|------|----------|
| work/employment plan at age 55   | 92        | 94      | 92           |       |     |      |          |
| work/employment plan at age 62   | 92        | 94      | 92           |       |     |      |          |
| work/employment plan at age 65   | 92        | 94      | 92           |       |     |      |          |
| stop working for pay in 2/3 yrs: likely  |           |         |              |       |     |      | 86/89    |
| stop working for pay in 2/3 yrs: reasons   |           |         |              |       |     |      | 86       |
| stop working for pay in 2/3 yrs: how much choice, feel   |           |         |              |       |     |      | 86       |
| likelihood of working full-time after 62   |           |         | 96           |       | x   |      |          |
| likelihood of working full-time after 65   |           |         | 96           |       | x   |      |          |
| likelihood to reduce time at work  |           |         | 96           |       |     |      |          |
| self assessment of employment/LF/self-employment/<br>work situation: 10 yrs ago, now, 10 yrs ahead |           |         |              | 95    |     |      |          |
| chance that health will limit work activity next 10yrs   |           |         |              |       | x   |      |          |
| planning to stop working at a particular age: when   |           |         |              |       | x   |      |          |
| planning to work fewer hrs at a particular age: when   |           |         |              |       | x   |      |          |
| planning to change the kind of work at a particular age: when                                      |           |         |              |       | x   |      |          |
| planning to work for yourself at a particular age: when  |           |         |              |       | x   |      |          |
| control over work  |           |         |              | 95    |     |      |          |
| efforts and thoughts on work   |           |         |              | 95    |     |      |          |
| attitudes on retirement  |           |         |              |       | x   | x    |          |
| retirement status/time   | 92        | 94      | 92/96        |       | x   | x    | 86/89/94 |
| retirement plan  | 92        | 94      | 92/96        |       | x   |      |          |
| retirement status/time (spouse)  | 92        | 94      | 92/96        |       | x   | x    |          |
| retirement plan (spouse)   | 92        | 94      | 92/96        |       | x   |      |          |
| when to stop working completely  | 92        | 94      | 92           |       | x   |      | 86/89/94 |
| retired: reasons   |           |         |              |       | x   |      | 86/89/94 |
| retired: as wanted to?   |           |         |              |       | x   |      | 86/89/94 |
| retired: satisfaction  |           |         |              |       | x   |      |          |
| retired: comparison to years before retired  |           |         |              |       | x   |      |          |
| retired: how much choice, feel   |           |         |              |       |     |      | 86/89/94 |
| degree if importance of some reasons why R retired   |           |         |              |       | x   |      |          |
| before retired, how much thought about retirement  |           |         |              |       | x   |      |          |
| preparation for retirement (retiree): discussion with others                                       |           |         |              |       | x   |      |          |
| preparation for retirement (retiree): attending meetings   |           |         |              |       | x   |      |          |
| chance back to work or increase work time  | 92        | 94      | 92           |       | x   |      |          |
| how do you expect living standards change  | 92        | 94      | 92/96        |       | x   | x    |          |
| want to continue some paid work when retire  |           |         |              |       | x   |      |          |
| volunteer work (see SOCIAL SUPPORTS)   |           |         |              |       |     |      | 86/89/94 |
| <b>MILITARY SERVICE</b>  |           |         |              |       |     |      |          |
| post high school, military plan  | 57        |         | 57           |       |     |      |          |
| entered as a draftee or enlisted   | 75/92     | 77/94   | 75/92        |       |     | x    |          |
| education before entering  | 75/92     | 77/94   | 75/92        |       |     |      |          |
| duration   | 75/92     | 77/94   | 75/92        |       | x   | x    |          |
| military education/training  | 75        |         | 75           |       |     |      |          |
| military ranking/program (history)   | 75        |         | 75           |       |     |      |          |
| promotion  | 75        |         | 75           |       |     |      |          |
| pay rank   | 75        |         | 75           |       |     |      |          |
| ever involved in combat  |           |         |              |       |     | x    |          |
| <b>INCOME</b>  |           |         |              |       |     |      |          |
| r and sp : wage/salary   | 75/92     | 77/94   | 75/92        |       | x   | x    | 86/89/94 |
| r and sp : farm (self employment) income   | 75        | 77      | 75           |       |     |      |          |
| r and sp: net income from self-employment  | 75/92     | 77/94   | 75/92        |       | x   | x    |          |
| r and sp: total income   | 75/92     | 77/94   | 75/92        | 95    | x   | x    | 86/89/94 |
| r and sp: child support and alimony payment  |           | 94      | 96           |       | x   | x    |          |
| hh: net income in total  | 92        | 94      | 92           | 95    | x   | x    |          |

|  | WLS Grads    | WLS Sib      | Life History | MIDUS               | HRS | NSFH | ACL                    |
|--|--------------|--------------|--------------|---------------------|-----|------|------------------------|
| hh: interest/dividends (capital income)                                | 92           | 94           | 92           |                     | x   | x    | 86/89/94 (couple, y/n) |
| hh: social security  | 92           | 94           | 92           | 95                  | x   | x    | 86/89/94 (couple, y/n) |
| hh: pension/annuities/benefit  | 92           | 94           | 92           |                     | x   | x    | 86/89/94 (couple, y/n) |
| hh: public assistance  | 92           | 94           | 92           | 95                  | x   | x    | 86/89/94 (couple, y/n) |
| hh: child support  | 92           | 94           | 92           |                     | x   | x    |                        |
| hh: alimony  | 92           | 94           | 92           |                     | x   | x    |                        |
| hh: unemployment compensation  |              |              |              |                     | x   | x    | 86/89/94 (couple, y/n) |
| hh: workers' compensation  |              |              |              |                     | x   | x    | 86/89/94 (couple, y/n) |
| hh: SSI and other welfare  |              |              |              |                     | x   | x    | 86/89/94 (couple, y/n) |
| hh: other sources  | 92           | 94           | 92           | 95                  | x   | x    | 86/89/94 (couple, y/n) |
| <b>FINANCIAL SITUATION AND INTERTRANSFER</b>                           |              |              |              |                     |     |      |                        |
| satisfaction with financial status                                     |              |              |              |                     | x   |      | 86/89/94               |
| self-evaluation  |              |              |              | 95                  |     |      |                        |
| comparison   |              |              |              |                     |     |      | 89 (to 86)             |
| comparison to 10 years before and after                                |              |              |              | 95                  |     |      |                        |
| control over financial situation                                       |              |              |              | 95                  |     |      |                        |
| thoughts and efforts on financial situation                            |              |              |              | 95                  |     |      |                        |
| meet needs (family)  |              |              |              | 95                  |     | x    |                        |
| paying bills   |              |              |              | 95                  |     |      | 86/89/94               |
| serious financial probs: time (86:ever; 89: since 86; 94: since 86/89) |              |              |              |                     |     |      | 86/89/94               |
| serious financial probs: types   |              |              |              |                     |     |      | 89                     |
| serious financial probs: expected                                      |              |              |              |                     |     |      | 86/89/94               |
| serious financial probs: how dealt                                     |              |              |              |                     |     |      | 86/89                  |
| serious financial probs: sp/children/friend help, worse mortgage       |              |              |              | 95 (y/n)            |     |      | 89                     |
| expense: food  |              |              |              |                     | x   |      | 86/89                  |
| expense: rent  |              |              |              |                     |     |      | 86/89                  |
| inheritance (>1000): r and sp (when and amount)                        | 92           | 94           | 92           |                     | x   | x    |                        |
| charity  | 92           | 94           | 92           |                     |     |      |                        |
| receiving: type (cash or property)                                     | 92 (1975 on) | 94 (1977 on) | 92 (1975 on) |                     | x   |      |                        |
| receiving: whom (parents and others, ranking)                          | 92 (1975 on) | 94 (1977 on) | 92 (1975 on) | 95 (public/private) | x   | x    |                        |
| receiving: amount  | 92 (1975 on) | 94 (1977 on) | 92 (1975 on) | 95                  | x   | x    |                        |
| receiving: time  | 92 (1975 on) | 94 (1977 on) | 92 (1975 on) |                     | x   | x    |                        |
| receiving: purpose   | 92 (1975 on) | 94 (1977 on) | 92 (1975 on) |                     | x   | x    |                        |
| to children: whom (ranking)  | 92 (1975 on) | 94 (1977 on) | 92 (1975 on) |                     | x   | x    |                        |
| to children: amount  | 92 (1975 on) | 94 (1977 on) | 92 (1975 on) |                     | x   | x    |                        |
| to children: time  | 92 (1975 on) | 94 (1977 on) | 92 (1975 on) |                     | x   | x    |                        |
| to children: purpose   | 92 (1975 on) | 94 (1977 on) | 92 (1975 on) |                     | x   | x    |                        |
| to parents: whom (ranking)   | 92 (1975 on) | 94 (1977 on) | 92 (1975 on) |                     | x   | x    |                        |
| to parents: amount   | 92 (1975 on) | 94 (1977 on) | 92 (1975 on) |                     | x   | x    |                        |
| to parents: time   | 92 (1975 on) | 94 (1977 on) | 92 (1975 on) |                     | x   | x    |                        |
| to parents: purpose  | 92 (1975 on) | 94 (1977 on) | 92 (1975 on) |                     | x   | x    |                        |
| to others: whom (ranking)  | 92 (1975 on) | 94 (1977 on) | 92 (1975 on) |                     | x   | x    |                        |
| to others: amount  | 92 (1975 on) | 94 (1977 on) | 92 (1975 on) |                     | x   | x    |                        |
| to others: time  | 92 (1975 on) | 94 (1977 on) | 92 (1975 on) |                     | x   | x    |                        |
| to others: purpose   | 92 (1975 on) | 94 (1977 on) | 92 (1975 on) |                     | x   | x    |                        |
| receiving >200 from ones not living together in past 5 yrs:whom        |              |              |              |                     |     | x    |                        |
| receiving >200 from ones not living together in past 5 yrs: \$         |              |              |              |                     |     | x    |                        |
| giving >200 to ones not living together in past 5 yrs: whom            |              |              |              |                     |     | x    |                        |
| giving >200 to ones not living together in past 5 yrs: \$              |              |              |              |                     |     | x    |                        |
| receiving from relatives living w/ r: for room or board, in \$         |              |              |              |                     |     | x    |                        |
| giving to relatives living w/ r: for clothing, entertainment, etc.     |              |              |              |                     |     | x    |                        |
| giving loan (>200) to relatives living with r: \$                      |              |              |              |                     |     | x    |                        |

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|---|-----------|---------|--------------|-------|-----|------|----------------------|
| <b>ASSETS AND WEALTH</b>                                    |           |         |              |       |     |      |                      |
| homeownership   | 92        | 94      | 92           | 95    | x   | x    | 86/89/94 (cur value) |
| real estate   | 92        | 94      | 92           |       | x   | x    |                      |
| business/farm   | 92        | 94      | 92           |       | x   | x    |                      |
| motor vehicles  | 92        | 94      | 92           |       | x   | x    |                      |
| IRA-Keoghs  |           |         |              | 95    | x   | x    |                      |
| stock mutual fund   |           |         |              |       | x   | x    |                      |
| checking-saving   |           |         |              |       | x   | x    |                      |
| bonds   |           |         |              |       | x   | x    |                      |
| CD  |           |         |              |       | x   | x    |                      |
| saving  | 92        | 94      | 92           |       | x   | x    |                      |
| investment (bond, fund, or stock)                           | 92        | 94      | 92           |       | x   | x    |                      |
| other assets  |           |         |              |       | x   | x    |                      |
| total (net) assets  |           |         |              | 95    | x   | x    | 86/89                |
| total assets from checking/saving/stock/bond                |           |         |              |       | x   | x    | 94                   |
| personal debts  | 92        | 94      | 92           |       | x   | x    |                      |
| ever homeless, last 5 years                                 |           |         |              | 95    |     |      |                      |
| ever phoneless, last 5 years                                |           |         |              | 95    |     |      |                      |
| <b>HOUSING AND NEIGHBORHOOD</b>                             |           |         |              |       |     |      |                      |
| perceived neighborhood quality                              |           |         |              | 95    |     |      | 86, 94               |
| perceived inequalities in neighborhood                      |           |         | 96           | 95    |     |      |                      |
| time in the current neighborhood                            |           |         |              | 95    |     |      |                      |
| satisfaction with home                                      |           |         |              |       | x   | x    | 86/89                |
| satisfaction with neighborhood                              |           |         |              |       | x   | x    | 86                   |
| housing (interviewer): types                                |           |         |              |       | x   | x    | 86/89                |
| housing (interviewer): structure (number of rooms, stories) |           |         |              |       | x   | x    | 86/89                |
| housing (interviewer): design (esp. for older people)       |           |         |              |       |     |      | 86/89                |
| housing (interviewer): location, including number of floor  |           |         |              |       |     |      | 86/89                |
| housing (interviewer): interior cleanliness                 |           |         |              |       | x   |      | 86/89                |
| housing (r): number of rooms                                |           |         |              |       |     |      | 86/89                |
| neighborhood (interviewer): various types of constructions  |           |         |              |       | x   |      | 86/89                |
| neighborhood (interviewer): well kept structure             |           |         |              |       | x   |      | 86/89                |
| neighborhood (interviewer): well kept yard/sidewalks        |           |         |              |       |     |      | 86/89                |
| <b>PENSION AND HEALTH INSURANCE</b>                         |           |         |              |       |     |      |                      |
| employment/union insurance: self                            | 92        | 94      | 92           | 95    | x   | x    | 94 (any)             |
| employment/union insurance: spouse                          | 92        | 94      | 92           | 95    | x   | x    |                      |
| employment/union insurance available: self                  |           |         |              | 95    |     |      |                      |
| employment/union insurance available: spouse                |           |         |              | 95    |     |      |                      |
| way of paying for employer/union insurance                  |           |         |              |       | x   |      |                      |
| whether employer/union insr is available to retiree         |           |         |              |       | x   |      |                      |
| whether employer/union pay the costs of insurance           |           |         |              |       | x   |      |                      |
| whether spouses of retired be covered under this plan       |           |         |              |       | x   |      |                      |
| non-empl insurance (types)                                  | 92        | 94      | 92           |       |     |      |                      |
| Gov: Medicare   |           |         |              | 95    | x   |      |                      |
| Gov: Medicaid   |           |         |              | 95    | x   |      |                      |
| Gov: VA/CHAMPUS   |           |         |              | 95    | x   |      |                      |
| Gov: others   |           |         |              |       | x   |      |                      |
| Medicare available to: self, spouse                         |           |         |              | 95    |     |      |                      |
| Medicaid available to: self, spouse                         |           |         |              | 95    |     |      |                      |
| VA/CHAMPUS available to: self, spouse                       |           |         |              | 95    |     |      |                      |
| Individual (private): Basic                                 |           |         |              |       | x   |      |                      |
| Individual (private): MEDIGAP                               |           |         |              |       | x   |      |                      |
| Individual (private): Other supplemental health             |           |         |              |       | x   |      |                      |
| Individual (private): Long-term care                        |           |         |              |       | x   |      |                      |

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|--|-----------|---------|--------------|-------|-----|------|-------------|
| <b>Individual (private): Others</b>  |           |         |              |       |     |      |             |
| amount of pay for individual insurance   |           |         |              |       | x   |      |             |
| whether health insurance covering mental health: self, spouse                                      |           |         |              | 95    |     |      | 89/94 (y/n) |
| reasons not to have insurance  | 92        |         | 92           |       |     |      |             |
| reasons being rejected by insurance co. (r, sp)  |           | 94      |              |       | x   |      |             |
| pensions: respondent/spouse  | 92        | 94      | 92           |       | x   | x    |             |
| pensions: plan(s)  | 92        | 94      | 92           | 95    | x   | x    |             |
| pensions: eligible age   | 92        | 94      | 92           |       | x   |      |             |
| pensions: current  | 92        | 94      | 92           |       | x   | x    |             |
| pension: type (formula, account)   |           |         |              |       | x   |      |             |
| pension: amount of pay   |           |         |              |       | x   |      |             |
| pension: benefits to be expected   |           |         |              |       | x   |      |             |
| life insurance: individual or group policies   |           |         |              |       | x   |      |             |
| life insurance: whether term insurance   |           |         |              |       | x   |      |             |
| life insurance: # of insurance policies  |           |         |              |       | x   |      |             |
| life insurance: obtained thru employer or individual   |           |         |              |       | x   |      |             |
| life insurance: amount   |           |         |              |       | x   |      |             |
| life insurance: current face value of policies   |           |         |              |       | x   |      |             |
| life insurance: beneficiary  |           |         |              |       | x   |      |             |
| <b>RETIREMENT AND FUTURE (see JOB section for more)</b>  |           |         |              |       |     |      |             |
| work full time after 55  | 92        | 94      | 92           |       |     |      |             |
| work full-time after 62  | 92        | 94      | 92/96        |       | x   |      |             |
| work full-time after 65  | 92        | 94      | 92/96        |       | x   |      |             |
| likelihood to reduce time at work  |           |         | 96           |       |     |      |             |
| work 10 years from now   | 75/92     | 77/94   | 75/92/96     |       |     |      |             |
| self assessment of employment/LF/self-employment/<br>work situation: 10 yrs ago, now, 10 yrs ahead |           |         |              | 95    |     |      |             |
| chance that health will limit work activity next 10yrs   |           |         |              |       | x   |      |             |
| planning to stop working at a particular age: when   |           |         |              |       | x   |      |             |
| planning to work fewer hrs at a particular age: when   |           |         |              |       | x   |      |             |
| planning to change the kind of work at a particular age: when                                      |           |         |              |       | x   |      |             |
| planning to work for yourself at a particular age: when  |           |         |              |       | x   |      |             |
| retirement status/time   | 92        | 94      | 92/96        |       | x   |      |             |
| attitudes on retirement  |           |         |              |       | x   | x    |             |
| retirement plan  | 92        | 94      | 92/96        |       | x   |      |             |
| moving to retirement comm (R age 50+)  |           |         |              |       |     |      | 86/89       |
| retirement status/time (spouse)  | 92        | 94      | 92/96        |       | x   | x    |             |
| retirement plan (spouse)   | 92        | 94      | 92/96        |       | x   |      |             |
| retired: reasons   |           |         |              |       | x   |      | 86/89/94    |
| retired: as wanted to?   |           |         |              |       | x   |      | 86/89/94    |
| retired: satisfaction  |           |         |              |       | x   |      |             |
| retired: comparison to years before retired  |           |         |              |       | x   |      |             |
| retired: how much choice, feel   |           |         |              |       | x   |      | 86/89/94    |
| degree if importance of some reasons why R retired   |           |         |              |       | x   |      |             |
| before retired, how much thought about retirement  |           |         |              |       | x   |      |             |
| preparation for retirement (retiree): discussion with others                                       |           |         |              |       | x   |      |             |
| preparation for retirement (retiree): attending meetings   |           |         |              |       | x   |      |             |
| when to stop working completely  |           |         | 96           |       | x   |      |             |
| chance back to work or increase work time  | 92        | 94      | 92/96        |       |     |      |             |
| influences on living standards   | 92        | 94      | 92/96        |       | x   |      |             |
| <b>FAMILY AND NETWORK</b>  |           |         |              |       |     |      |             |
| <b>MARRIAGE/COHABITATION (see also INTIMATE REL)</b>   |           |         |              |       |     |      |             |
| post high school, marriage plan  | 57        |         | 57           |       |     | x    |             |
| marital status   | 64/75/92  | 77/94   | 64/75/92/96  | 95    | x   | x    | 86/89/94    |

|  | WLS Grads    | WLS Sib      | Life History       | MIDUS             | HRS         | NSFH | ACL                          |
|--|--------------|--------------|--------------------|-------------------|-------------|------|------------------------------|
| number of marriages  | 75/92        | 77/94        | 75/92/96           | 95                | x           | x    | 86/89/94                     |
| marital history  | 75/92        | 77/94        | 75/92/96           |                   | x           | x    | 86(frist/widow/div), 89(cur) |
| marriage(s): age   | 75/92        | 77/94        | 75/92/96           | first/most recent | x           | x    |                              |
| marriage(s): duration                                      | 75/92        | 77/94        | 75/92/96           | first/most recent | x           | x    |                              |
| marriage(s): reason of ending                              | 75/92        | 77/94        | 75/92/96           | first/most recent | x           | x    |                              |
| marriage(s): fertility                                     | 75/92        | 77/94        | 75/92              |                   |             | x    |                              |
| cohabitation history                                       |              |              |                    |                   |             | x    |                              |
| cohabitation: duration                                     |              |              |                    |                   |             | x    |                              |
| cohabitation: number of partner                            |              |              |                    |                   |             | x    |                              |
| cohabitation: plan (how likely, age)                       |              |              |                    |                   |             | x    |                              |
| the perceived quality of cur marr (see INTIMATE REL)       |              |              |                    | 95                |             | x    | 86/89/94                     |
| serious romantic relationship - duration                   |              |              | 96                 |                   |             |      |                              |
| <b>SPOUSE(S)/INTIMATE PARTNER (R's report only)</b>        |              |              |                    |                   |             |      |                              |
| first spouse: education                                    | 75           | 77/94        | 75                 |                   |             | x    |                              |
| first spouse: age/birthdate                                | 75           | 77/94        | 75                 |                   |             | x    |                              |
| first spouse: age at marriage                              | 75           | 77/94        | 75                 |                   |             | x    |                              |
| first spouse: married before                               |              |              |                    |                   |             | x    |                              |
| first spouse: any children before, #                       |              |              |                    |                   |             | x    |                              |
| first spouse: age of children                              |              |              |                    |                   |             | x    |                              |
| first spouse: religion change, religion before marriage    |              |              |                    |                   |             | x    |                              |
| first spouse: LFP  |              |              |                    |                   |             | x    |                              |
| first spouse: father's education                           |              |              |                    |                   | x           |      |                              |
| first spouse: live with natural parents up to 14           |              |              |                    |                   |             | x    |                              |
| last spouse: SES (origin)                                  | 75 (cur sp)  |              | 75 (cur sp)        |                   | x (widowed) |      |                              |
| last spouse: age/birthdate                                 | 75/92        | 77/94        | 75/92              |                   | x (widowed) |      |                              |
| last spouse: education                                     | 75/92        | 77/94        | 75/92              |                   | x (widowed) |      |                              |
| last spouse: occ (industry, self-employed, private/public) | 75/92        | 77/94        | 75/92              |                   | x (widowed) |      |                              |
| last spouse: marital history                               | 75/92        |              | 75/92              |                   | x (widowed) |      |                              |
| last spouse: age at marriage                               | 75/92        | 77/94        | 75/92              |                   | x (widowed) |      |                              |
| last spouse: time at dissolution                           | 75/92        | 77/94        | 75/92              |                   | x (widowed) |      | 86 (if 1 mar)                |
| last spouse: dealing with divorce                          |              |              |                    |                   |             |      | 86 (if 1 mar)                |
| last spouse: death (place, time)                           | 92 (1975 sp) | 94 (1977 sp) | 92 (1975 sp)       |                   | x (widowed) |      | 86 (if widow ever)           |
| last spouse: dealing with spousal death                    |              |              |                    |                   |             |      | 86 (if widow ever)           |
| cur spouse: SES (origin)                                   | 75 (cur sp)  |              | 75 (cur sp)        |                   | x           | x    |                              |
| cur spouse: nationality/race                               |              |              |                    |                   | x           | x    | 86/89/94                     |
| cur spouse: age/birthdate                                  | 75/92        | 77/94        | 75/92              | 95                | x           | x    | 86/89/94                     |
| cur spouse: ages living with nature/step parents           |              |              |                    |                   |             | x    |                              |
| cur spouse: relationship with parents/siblings             |              |              |                    |                   |             | x    |                              |
| cur spouse: relationship with in-laws                      |              |              |                    |                   |             | x    |                              |
| cur spouse: health of parents                              |              |              |                    |                   |             | x    |                              |
| cur spouse: education                                      | 75/92        | 77/94        | 75/92/96           | 95                | x           | x    | 86/89/94                     |
| cur spouse: LFP  | 64/75/92     | 77/94        | 64/75/92/96        |                   | x           | x    | 86/89/94                     |
| cur spouse: occ(industry, self-employed, private/public)   | 64/75/92     | 77/94        | 64/75/92/96(brief) | 95                | x           | x    | 86/89/94                     |
| cur spouse: work schedule                                  |              |              |                    | 95                |             | x    |                              |
| cur spouse: time to work                                   |              |              |                    | 95                | x           | x    |                              |
| cur spouse: time traveling to work                         |              |              |                    | 95                |             |      |                              |
| cur spouse: work plan in the next 2 years                  |              |              |                    | 95                |             |      |                              |
| cur spouse: marital history                                | 75/92        | 77/94        | 75/92/96           |                   | x           | x    |                              |
| cur spouse: age at marriage                                | 75/92        | 77/94        | 75/92/96           |                   | x           | x    |                              |
| cur spouse: religion at marriage                           | 75/92        |              | 75/92              |                   |             |      |                              |
| cur spouse: current religion                               | 75/92        |              | 75/92              |                   | x           | x    |                              |
| cur spouse: salary/wage                                    | 75/92        | 77/94        | 75/92              | 95                | x           | x    |                              |
| cur spouse: second job                                     |              |              |                    |                   | x           | x    |                              |
| cur spouse: child care while R is working                  |              |              |                    |                   |             | x    |                              |
| cur spouse: self empl income                               | 92           | 94           | 92                 | 95                | x           | x    |                              |



|   | WLS Grads       | WLS Sib         | Life History    | MIDUS       | HRS | NSFH             | ACL                          |
|---|-----------------|-----------------|-----------------|-------------|-----|------------------|------------------------------|
| in control of the relationship with children                |                 |                 |                 | 95          |     |                  |                              |
| efforts and thoughts on relationship with children          |                 |                 |                 | 95          |     |                  |                              |
| life changed for children                                   |                 |                 |                 | 95          |     |                  |                              |
| fertility history   | 75/92           | 77/94           | 75/92           | 95          |     | x                |                              |
| fertility and LFP history (women)                           | 75 (up to 1974) | 77 (up to 1976) | 75 (up to 1974) |             |     |                  |                              |
| <b>SELECTED (FOCAL) CHILD</b>                               |                 |                 |                 |             |     |                  |                              |
| birth order   | 75/92           | 77/94           | 75/92           |             |     | x                |                              |
| birth date  | 75/92           |                 | 75/92           |             |     | x                |                              |
| education (degrees)   | 92              | 94              | 92              |             |     | x                |                              |
| schooling   | 92              | 94              | 92              |             |     | x                |                              |
| current residence (or living arrangement)                   |                 |                 |                 |             |     | x                |                              |
| R's educational expectation/aspiration for the child        | 75/92           |                 | 75/92           |             |     | x                |                              |
| R's expectation on child's occupation                       | 75              |                 | 75              |             |     |                  |                              |
| perceived influence on child's education                    | 92              |                 | 92              |             |     | x                |                              |
| military  | 92              |                 | 92              |             |     |                  |                              |
| labor force/employment                                      | 92              |                 | 92              |             |     | x                |                              |
| occupation (industry, self-employed, private/public)        | 92              |                 | 92              |             |     |                  |                              |
| job search activities (with R's help?)                      | 92              |                 | 92              |             |     |                  |                              |
| R's financial aid or payments                               |                 |                 |                 |             |     | x                |                              |
| marital status  | 92              | 94              | 92              |             |     | x                |                              |
| closeness and contact                                       | 92              | 94              | 92              |             |     | x                |                              |
| <b>PARENTS (OWN; IN-LAWS)</b>                               |                 |                 |                 |             |     |                  |                              |
| grandparents' not born in U.S.                              |                 |                 |                 |             |     |                  | 86                           |
| parents: nationality/race                                   |                 |                 |                 | 95 (father) |     |                  | 86                           |
| parents: age or birth date                                  | 75/92           | 94              | 75/92           | 95          | x   | x                | 86 (nature; age)             |
| parents: education  | 57/75/92        | 77/94           | 57/75/92        |             | x   | x                |                              |
| parents: occ (industry, self-employed, private/public)      | 57/75/92        | 77/94           | 57/75/92        |             |     | x                |                              |
| parents: residence  | 57/64/75/92     |                 | 57/64/75/92     |             | x   | x                |                              |
| parents: personality/characters perceived by R              |                 |                 | 96              | 95          |     |                  |                              |
| parents: living arrangement                                 | 92              |                 | 92              |             | x   | x                |                              |
| parents: duration if living together/distance               | 92              |                 | 92              |             | x   | x                |                              |
| parents: health   | 92              |                 | 92/96           | 95          | x   | x                |                              |
| parents: marital status                                     | 57/64/75/92     | 77/94           | 57/64/75/92     |             | x   | x                |                              |
| parents: contact  | 92              | 94              | 92              |             | x   | x                | 86/89                        |
| parents: closeness  | 92              | 94              | 92              |             |     | x                |                              |
| parents: social comparison (same sex parent)                | 92              | 94              | 92              |             |     |                  |                              |
| parents: similar outlook/views                              | 92              | 94              | 92              |             |     |                  |                              |
| parents: perceived support (loved/cared, willing to listen) |                 |                 |                 |             |     | x (see footnote) |                              |
| parents: perceived hassle (demand and criticized)           |                 |                 |                 |             |     | x (see footnote) | 86/89/94                     |
| parents: guidance   |                 |                 |                 |             |     |                  | 86/89                        |
| parents: perceived relationship (bio/step)                  |                 |                 |                 |             |     | x                |                              |
| parents: income   | 75/92           | 94              | 75/92           |             |     | x (see footnote) |                              |
| parents: home ownership                                     | 92              | 94              | 92              |             | x   | x (see footnote) |                              |
| parents: net worth  | 92              | 94              | 92              |             |     | x (see footnote) |                              |
| parents: R's assessment on parents' financial situation     |                 |                 |                 |             | x   |                  |                              |
| parents: financial intertransfer to and from                | 92              | 94              | 92              |             | x   | x                |                              |
| parents: death  | 92              | 94              | 92              | 95          | x   | x                | 86/89/94 (bio/natural)       |
| parents: time/place/cause of death                          | 92              | 94              | 92              | 95          | x   | x                | 86/89/94 (bio/natural)       |
| parent figures, if parents died: relation to R              |                 |                 |                 |             |     |                  | 86                           |
| parent figures, if parents died: guidance                   |                 |                 |                 |             |     |                  | 86                           |
| parental death in last 3 yrs: relation (bio/step)           |                 |                 |                 |             |     | x                | 86/89, 94 (since last intvw) |
| parental death in last 3 yrs: time                          |                 |                 |                 |             |     | x                | 86/89, 94 (since last intvw) |

|  | WLS Grads   | WLS Sib     | Life History | MIDUS | HRS           | NSFH                 | ACL      |
|--|-------------|-------------|--------------|-------|---------------|----------------------|----------|
| parental death in last 3 yrs: dealing with death well    |             |             |              |       |               |                      | 86/89    |
| mother's maiden name (in MEMORY TEST, see IQ)            |             |             |              |       |               |                      | 86/89/94 |
| in-laws: education                                       | 75 (cur sp) |             | 75 (cur sp)  |       | x             | x                    |          |
| in-laws: occ (industry, self-employed, private/public)   | 75 (cur sp) |             | 75 (cur sp)  |       |               |                      |          |
| in-laws: residence                                       | 92          |             | 92           |       | x             | x                    |          |
| in-laws: living arrangement                              | 92          |             | 92           |       | x             | x                    |          |
| in-laws: living distance                                 | 92          |             | 92           |       | x             | x                    |          |
| in-laws: health  | 92          |             | 92           |       | x             | x                    |          |
| in-laws: marital status                                  | 92          |             | 92           |       | x             | x                    |          |
| in-laws: contact   | 92          |             | 92           |       | x             | x                    |          |
| in-laws: income  | 92          |             | 92           |       |               |                      |          |
| in-laws: home ownership                                  | 92          |             | 92           |       | x             |                      |          |
| in-laws: net worth                                       | 92          |             | 92           |       |               |                      |          |
| in-laws: financial intertransfer to and from             | 92          |             | 92           |       | x             | x                    |          |
| in-laws: death   | 92          | 94          | 92           |       | x             | x                    |          |
| in-laws: perceived relationship                          |             |             |              |       |               | x                    |          |
| in-laws: perceived relationship with siblings-in-laws    |             |             |              |       |               | x                    |          |
| <b>SIBLINGS</b>  |             |             |              |       |               |                      |          |
| number of siblings                                       | 75/92       | 75/77/92/94 | 75/92/96     | 95    | x             | x                    |          |
| 3 most influential siblings                              |             |             | 96           |       |               |                      |          |
| all siblings: name                                       | 75/92       |             | 75/92        |       |               |                      |          |
| all siblings: sex  | 75/92       |             | 75/92        |       | x             | x(num of bro, sis)   |          |
| all siblings: relation                                   | 75/92       |             | 75/92        |       | x             | x(num of full, step) |          |
| all siblings: age  | 75/92       |             | 75/92        |       | x             | x (see footnote)     |          |
| all siblings: birth order                                | 75/92       |             | 75/92        |       | x             | x (see footnote)     |          |
| all siblings: education                                  | 75/92       |             | 75/92        |       |               | x (see footnote)     |          |
| all siblings: occupation                                 |             |             | 96           |       |               |                      |          |
| all siblings: marital status                             |             |             |              |       | x             | x                    |          |
| all siblings: living distance                            |             |             |              |       |               | x                    |          |
| all siblings: social contacts                            |             |             | 96           |       |               |                      |          |
| all siblings: closeness                                  |             |             | 96           |       |               | x                    |          |
| all siblings: outlook in life                            |             |             | 96           |       |               |                      |          |
| all siblings: comparison in education/work/finance       |             |             | 96(detailed) |       | x             |                      |          |
| all siblings: perceived relationship                     |             |             |              |       |               | x                    |          |
| <b>SELECTED SIBLING</b>                                  |             |             |              |       |               |                      |          |
| birthdate  | 75/92       | 94          | 75/92        |       |               |                      |          |
| high school characteristics                              | 75/92       | 77/94       | 75/92        |       |               |                      |          |
| living together up to age 16 (most of time)              | 77/92/94    | 77/94       | 77/92/94     |       |               |                      |          |
| marital status   | 92          | 94          | 92           |       | x             |                      |          |
| employment   | 75/92       | 94          | 75/92        |       | x (30 hrs/wk) |                      |          |
| last/cur occ (industry, self-employed, private/public)   | 75/92       | 94          | 75/92        |       |               |                      |          |
| job search activities (with R's help?)                   | 92          | 94          | 92           |       |               |                      |          |
| own a home   |             |             |              |       | x             |                      |          |
| having anyone under age 18 living with                   |             |             |              |       | x             |                      |          |
| living arrangement with parents: together, w/in 10 miles |             |             |              |       | x             |                      |          |
| contact  | 92          | 94          | 92           |       |               |                      |          |
| closeness  | 92          | 94          | 92           |       |               |                      |          |
| similar outlook/view                                     | 92          | 94          | 92           |       |               |                      |          |
| social comparison  | 92          | 94          | 92           |       | x (financial) |                      |          |
| death place  | 92          | 94          | 92           |       |               |                      |          |
| death cause  | 92          | 94          | 92           |       |               |                      |          |
| <b>HOUSEHOLD MEMBERS</b>                                 |             |             |              |       |               |                      |          |
| name   | 92          | 94          | 92           |       | x             | x                    |          |



|  | WLS Grads | WLS Sib | Life History | MIDUS | HRS | NSFH         | ACL       |
|--|-----------|---------|--------------|-------|-----|--------------|-----------|
| <b>vulnerability index</b>   |           |         |              |       |     |              | 86/89     |
| <b>autonomy</b>  | 92        | 94      | 92/96        | 95    |     | x            |           |
| <b>personal growth</b>   | 92        | 94      | 92/96        | 95    |     | x            |           |
| <b>environment mastery</b>   | 92        | 94      | 92/96        | 95    |     | x            |           |
| <b>positive relationship with others</b>   | 92        | 94      | 92/96        | 95    |     | x            |           |
| <b>purpose in life</b>   | 92        | 94      | 92/96        | 95    |     | x            |           |
| <b>self-acceptance</b>   | 92        | 94      | 92/96        | 95    |     | x            |           |
| <b>Brandstadter flexible goal adjustment</b>   | 92        | 94      | 92           |       |     |              |           |
| <b>Brandstadter tenacious goal pursuit</b>   | 92        | 94      | 92           |       |     |              |           |
| <b>Goal strategies (now, 10 yrs ago, 10 yrs beyond)</b>  |           |         |              | 95    |     |              |           |
| <b>Optimism (hope item from CESD)</b>  | 92        | 94      | 92           | 95    |     | x            |           |
| <b>Generativity (adapted McAdams)</b>  |           |         |              | 95    |     |              |           |
| <b>Self-esteem (Rosenberg, 1965)</b>   |           |         |              | 95    |     | x            |           |
| <b>sense of achievement (work/finance/education)</b>   | 92        | 94      | 92           |       |     |              |           |
| <b>Personal efficacy/Mastery</b>   |           |         |              | 95    |     | x            |           |
| <b>Perceived constraints</b>   |           |         |              | 95    |     |              |           |
| <b>Perceived life overall (cur, 10 yrs ago, 10 yrs later)</b>  |           |         |              | 95    |     | x(cur. only) |           |
| <b>Perceived control over health</b>   |           |         |              | 95    |     |              |           |
| <b>Perceived control over life in general, sex, work,<br/>relationship with spouse/partner/children<br/>finance, contribution to others</b>    |           |         |              | 95    |     |              |           |
| <b>ATTITUDES, BELIEFS, PRIORITIES</b>  |           |         |              |       |     |              |           |
| <b>attitudes regarding ageing and elderly</b>  |           |         |              |       |     |              | 86/89     |
| <b>attitudes regarding middle age, rating 20s, 40s, 60s.</b>   |           |         |              | 95    |     |              |           |
| <b>importance of success in work/finance/education</b>   | 92        | 94      | 92/96        |       |     |              |           |
| <b>importance of various job characteristics</b>   | 92        | 94      | 92           |       |     |              |           |
| <b>perceived life success in general</b>   |           |         | 96 (open)    |       |     |              |           |
| <b>Thoughts and efforts on overall life, sex, work,<br/>relationship with spouse/partner/children<br/>finance, contribution to others</b>      |           |         |              | 95    |     |              |           |
| <b>Problem management strategies/beliefs</b>   |           |         |              | 95    |     |              |           |
| <b>Life management beliefs/strategies</b>  |           |         |              | 95    |     |              |           |
| <b>fatalism index</b>  |           |         |              |       |     |              | 86/89     |
| <b>social/ultimate justice index</b>   |           |         |              |       |     |              | 86/89     |
| <b>Beliefs about planning and making sense of the past</b>   |           |         |              | 95    |     |              |           |
| <b>Beliefs about gathering support from others</b>   |           |         |              | 95    |     |              |           |
| <b>Family responsibility/obligation (Rossi)</b>  |           |         |              | 95    |     | x            |           |
| <b>Social (nonfamily) responsibility</b>   |           |         |              | 95    |     |              |           |
| <b>Gender Role Attitude on family/work/household</b>   |           |         |              | 95    |     | x            | 89        |
| <b>attitudes on divorce and marriage</b>   |           |         |              |       |     | x            |           |
| <b>attitudes on parenting</b>  |           |         |              |       |     | x            |           |
| <b>PERCEIVED DISCRIMINATION, IDENTITY</b>  |           |         |              |       |     |              |           |
| <b>Social well-being/alienation (Keyes, 6 scales)</b>  |           |         |              | 95    |     |              |           |
| <b>Perceived inequalities and opportunities<br/>(family, work)</b>   |           |         | 96           | 95    |     |              |           |
| <b>Perceived inequalities in neighborhood</b>  |           |         | 96           | 95    |     |              |           |
| <b>Perceived race identification/closeness</b>   |           |         |              | 95    |     |              | 86        |
| <b>Perceived discrimination due to race/ethnicity, sex,<br/>physical appearance, age, religion,<br/>sexual orientation, or others.</b>         |           |         |              | 95    |     |              | 94 (race) |
| <b>Perceived discrimination in frequency: education,<br/>scholarship, hiring, promotion, housing,<br/>police, loan, medical care, service.</b> |           |         |              | 95    |     |              |           |
| <b>Perceived frequency of day to day discrimination</b>  |           |         |              | 95    |     |              |           |

|   | WLS Grads | WLS Sib | Life History | MIDUS           | HRS | NSFH         | ACL                 |
|---|-----------|---------|--------------|-----------------|-----|--------------|---------------------|
| Main self-assessed reason for discrimination  |           |         |              | 95              |     |              |                     |
| Perceived amount that discrimination interferes on productive life, life getting harder |           |         |              | 95              |     |              |                     |
| <b>RELIGION</b>   |           |         |              |                 |     |              |                     |
| family religion/religiosity   | 75        |         | 75           |                 |     | x            |                     |
| religion at high school   | 75        |         | 75           |                 |     |              |                     |
| current religion/religiosity  | 75/92     | 77/94   | 75/92/96     | 95              | x   | x            | 86/94               |
| Spirituality  |           |         | 96           | 95              |     | x            |                     |
| Degree of identification with religious group   |           |         | 96           | 95              |     |              |                     |
| General importance of religion: family origin, currently                                |           |         | 96           | 95              |     |              | 86/89/94 (cur only) |
| Importance of religion: seeking comfort, decision making                                |           |         | 96           | 95              |     |              |                     |
| importance of spirituality in current life  |           |         | 96           | 95              |     |              |                     |
| importance of spirituality: praying, meditation   |           |         | 96           |                 |     |              |                     |
| Openness about religiosity/ spirituality  |           |         |              | 95              |     |              |                     |
| religiosity: attending services   | 75/92     | 77/94   | 75/92        | 95              | x   | x            | 86/89               |
| religiosity: reading text   |           |         |              |                 |     |              | 86                  |
| religiosity: TV/tapes   |           |         |              |                 |     |              | 86                  |
| religiosity: freq seeking spiritual comfort at diff time                                |           |         |              |                 |     |              | 86/89               |
| religious beliefs: re-united with loved, reward after life                              |           |         |              |                 |     |              | 86                  |
| Superstitiousness   |           |         | 96           | 95              |     |              |                     |
| Fundamentalism beliefs  |           |         | 96           | 95              |     | x            |                     |
| Born again (Christian)  |           |         | 96           | 95              |     | x            |                     |
| religion before marriage (SP)   | 92        |         | 92           |                 |     | x            |                     |
| current religion (SP)   | 92        |         | 92           |                 | x   | x            |                     |
| <b>RELATIONSHIP AND INTERACTIONS WITH OTHERS</b>  |           |         |              |                 |     |              |                     |
| <b>RELATIONSHIP WITH SPOUSE/PARTNER</b>   |           |         |              |                 |     |              |                     |
| quality in general  |           |         | 96           | 95              |     | x            |                     |
| quality in general: 10 yrs ago, 10 yrs later  |           |         |              | 95              |     |              |                     |
| marital satisfaction  |           |         |              |                 | x   | x            | 86/89/94            |
| closeness with spouse   | 92        | 94      | 92/96        |                 |     | x            | 86/89               |
| sharing similar views with spouse   | 92        | 94      | 92/96        |                 |     | x (by items) |                     |
| intimacy: emotional/sexual/recreational/intellectual/social                             |           |         | 96           |                 |     |              |                     |
| conventionality   |           |         | 96           |                 |     |              |                     |
| partner abuse: emotional/verbal/physical  |           |         | 96           |                 |     |              |                     |
| unfulfilled family/personal asp at youth  |           |         | 96           |                 |     |              |                     |
| family/personal life: aspects better/worse than expected (why)                          |           |         | 96           |                 |     |              |                     |
| family/personal life: successful? (why)   |           |         | 96           |                 |     |              |                     |
| family/personal life: one major change (why)  |           |         | 96           |                 |     |              |                     |
| in control  |           |         |              | 95              |     |              |                     |
| efforts and thoughts on marriage  |           |         |              | 95              |     |              |                     |
| chance to separate  |           |         |              | 95              |     |              |                     |
| marital harmony index: deserved,div/sep, forgiven, conflict, upset                      |           |         |              |                 |     | x            |                     |
| dependency on spouse: lost, death, taking place   |           |         |              |                 |     |              | 86/89               |
| negative spouse behavior: drink, violence, affair, waste \$                             |           |         |              |                 |     | x            | 86/89               |
| marital/relationship difficulties: in trouble, sep                                      |           |         |              | 95              |     | x            |                     |
| disagreement: financial, hh chores, leisure, something important                        |           |         |              | 95              |     | x            |                     |
| specific quality: communication, caring, understanding                                  |           |         |              |                 |     |              |                     |
| appreciation, help, relaxing  |           |         |              | 95              |     | x            |                     |
| specific problem: demanding, tense, argument, let you down, get on nerve                |           |         |              | 95              |     | x            |                     |
| family/personal decision making with sp/partner   |           |         |              | 95              |     |              | 89                  |
| perceived support (loved/cared, willing to listen)                                      |           |         |              | 95 (more items) |     |              | 86/89/94            |

|  | WLS Grads | WLS Sib | Life History | MIDUS           | HRS | NSFH          | ACL      |
|--|-----------|---------|--------------|-----------------|-----|---------------|----------|
| perceived hassle (demand and criticized)                         |           |         |              | 95 (more items) |     |               | 86/89/94 |
| perceived inequality between supports from/to sp                 |           |         |              |                 |     | x             | 89       |
| freq of conflict/disagreement, bothered/upset                    |           |         |              |                 |     | x             | 86/89/94 |
| perceived changes in life if separated                           |           |         |              |                 |     | x             |          |
| <b>HOUSEHOLD WORK</b>  |           |         |              |                 |     |               |          |
| time spent on hh chores: self and spouse/partner                 |           |         |              | 95              |     | x             |          |
| home maintenance: repair, mowing, canning, car repair            |           |         |              |                 |     | x             | 86/89    |
| home maintenance: money saved, time spent, enjoyment             |           |         |              |                 |     |               | 86/89    |
| childcare: time spent  |           |         |              |                 |     | x             | 86/89/94 |
| childcare: enjoyment and benefits                                |           |         |              |                 |     |               | 86/89/94 |
| childcare by r and sp: change schedule, serious problem          |           |         |              | 95              |     |               |          |
| housework: cleaning, cooking, laundry, sew&mend                  |           |         |              |                 |     | x             | 86/89/94 |
| housework: time spent, enjoyment, any help                       |           |         |              |                 |     |               | 86/89/94 |
| housework: pride, respect, rewarding                             |           |         |              | 95              |     | x             |          |
| fairness in hh chores: r, sp                                     |           |         |              | 95              |     | x             |          |
| staying home: job characteristics                                |           |         |              |                 |     |               | 86       |
| staying home: difficulties to do a good job                      |           |         |              |                 |     |               | 86       |
| <b>SEXUALITY AND SEXUAL RELATIONSHIP</b>                         |           |         |              |                 |     |               |          |
| quality in general   |           |         |              | 95              |     | x             |          |
| quality in specific dimensions                                   |           |         | 96           |                 |     |               |          |
| quality comparison to 10 years ago and 10 years ahead            |           |         |              | 95              |     |               |          |
| control over sexual life   |           |         |              | 95              |     |               |          |
| efforts and thoughts on sexual life                              |           |         |              | 95              |     |               |          |
| number of sex partners, past year                                |           |         |              | 95              |     |               |          |
| sexual orientation   |           |         |              | 95              |     |               |          |
| having sex, frequency in the last 6 months                       |           |         |              | 95              |     | x(past 1 mon) |          |
| <b>WIDOWHOOD</b>   |           |         |              |                 |     |               |          |
| most recent dead sp: age at death                                |           |         |              |                 | x   | x             | 86/89/94 |
| most recent dead sp: exp or unexpected                           |           |         |              |                 |     | x             | 86/89/94 |
| most recent dead sp: living arrangement before death             |           |         |              |                 |     | x             | 89       |
| most recent dead sp: last time of work for pay                   |           |         |              |                 |     | x             |          |
| most recent dead sp: most recent job                             |           |         |              |                 |     | x             |          |
| most recent dead sp: working hours per week                      |           |         |              |                 |     | x             |          |
| most recent dead sp: cause(s) of death                           |           |         |              |                 |     | x             | 86/89/94 |
| most recent dead sp: medical conditions or illness               |           |         |              |                 | x   | x             |          |
| most recent dead sp: time lapse, if ill, or sudden               |           |         |              |                 |     | x             | 89/94    |
| most recent dead sp: ill before, if died of accident             |           |         |              |                 |     | x             | 89/94    |
| most recent dead sp: care required                               |           |         |              |                 |     | x             | 89/94    |
| most recent dead sp: duration and intensity of care              |           |         |              |                 |     | x             | 89/94    |
| most recent dead sp: help from others                            |           |         |              |                 |     | x             |          |
| most recent dead sp: time to recover for R                       |           |         |              |                 |     |               | 89/94    |
| grief : duration to recover, missing, talking about              |           |         |              |                 |     |               |          |
| special occ to miss, feeling, death meaning to R,                |           |         |              |                 |     |               | 86/89/94 |
| why not recovered  |           |         |              |                 |     |               | 86       |
| supports or worse, children/rel-friends                          |           |         |              |                 |     | x             | 89       |
| widowed experience: self-confidence, responsibly,                |           |         |              |                 |     |               |          |
| negligence, meant to be, unfair, remarriage,                     |           |         |              |                 |     |               |          |
| better off for the dead, stronger.                               |           |         |              |                 |     |               | 86/89/94 |
| financial situation: start/stop/change in Soc Sec and \$         |           |         |              |                 | x   |               |          |
| financial situation: start/stop/change in Supp Sec and \$        |           |         |              |                 | x   |               |          |
| financial situation: start/stop/change in Vet benif and \$       |           |         |              |                 | x   |               |          |
| financial situation: start/stop/change in pens or annuity and \$ |           |         |              |                 | x   |               |          |
| financial situation: start/stop/change in earnings and \$        |           |         |              |                 | x   |               |          |

|   | WLS Grads    | WLS Sib      | Life History     | MIDUS | HRS            | NSFH             | ACL                 |
|---|--------------|--------------|------------------|-------|----------------|------------------|---------------------|
| financial situation: start/stop/change in wk hrs and \$   |              |              |                  |       | x              |                  |                     |
| financial situation: change in health insurance   |              |              |                  |       | x              |                  |                     |
| financial situation: received life insr settlement and \$                                       |              |              |                  |       | x              |                  |                     |
| financial situation: received lump-sum pension settle and \$ expenses associated with the death |              |              |                  |       | x              |                  |                     |
| <b>CLOSENESS AND SIMILAR VIEWS WITH FAMILY</b>  |              |              |                  |       |                |                  |                     |
| closeness: spouse   | 92           | 94           | 92/96            |       |                | x                |                     |
| closeness: parents  | 92           | 94           | 92               |       |                | x                |                     |
| closeness: sibling  | 92           | 94           | 92/96            |       |                | x                |                     |
| closeness: children   | 92           | 94           | 92/96            |       |                | x                |                     |
| similar views: spouse   | 92           | 94           | 92/96            |       |                | x                |                     |
| similar views: parents  | 92           | 94           | 92               |       |                | x                |                     |
| similar views: sibling  | 92           | 94           | 92/96            |       |                |                  |                     |
| similar views: children   | 92           | 94           | 92/96            |       |                | x                |                     |
| <b>SOCIAL COMPARISON TO FAMILY</b>  |              |              |                  |       |                |                  |                     |
| financial: same sex parent  | 92           | 94           | 92               |       |                |                  |                     |
| financial: sibling  | 92           | 94           | 92/96            |       | x (focal sib)  |                  |                     |
| financial: children   | 92           | 94           | 92/96            |       |                | x                |                     |
| work: same sex parent   | 92           | 94           | 92               |       |                |                  |                     |
| work: sibling   | 92           | 94           | 92/96            |       |                |                  |                     |
| work: children  | 92           | 94           | 92/96            |       |                | x                |                     |
| education: same sex parent  | 92           | 94           | 92               |       |                | x (see footnote) |                     |
| education: sibling  | 92           | 94           | 92/96            |       |                | x                |                     |
| education: children   | 92           | 94           | 92/96            |       |                | x                |                     |
| <b>SOCIAL SUPPORT ( also see CAREGIVING)</b>  |              |              |                  |       |                |                  |                     |
| any adult/friend for confiding while growing up   |              | 94           |                  |       |                |                  |                     |
| confidant (kin and non-kin)   | 92           | 94           | 92/96            |       |                |                  | 94                  |
| receiving help: persons (last month)  | 92 (last mo) | 94 (last mo) | 92/96 (since 92) |       |                | x                |                     |
| receiving help: types (last month)  | 92 (last mo) | 94 (last mo) | 92/96 (since 92) |       |                | x                |                     |
| giving help: persons (last month)   | 92 (last mo) | 94 (last mo) | 92/96 (since 92) |       | x (to parents) | x                | 86/89 (cur/last mo) |
| giving help: types (last month)   | 92 (last mo) | 94 (last mo) | 92/96 (since 92) |       |                | x                | 86/89 (cur/last mo) |
| giving help: time   |              |              |                  |       | x              |                  | 86/89 (cur/last mo) |
| giving help: how stressful  |              |              |                  |       |                |                  | 86/89 (cur)         |
| volunteer works (12 mos): types (church/edu/pol/sr citz/other)                                  |              |              |                  |       |                |                  | 86/89/94            |
| volunteer works: time   |              |              |                  |       | x              |                  | 86/89/94            |
| volunteer works: enjoyment  |              |              |                  |       |                |                  | 86/89/94            |
| volunteer works: satisfaction   |              |              |                  |       |                |                  | 86                  |
| volunteer works: better/worse off for R   |              |              |                  |       |                |                  | 86                  |
| volunteer works: better/worse off for others  |              |              |                  |       |                |                  | 86/89               |
| volunteer works: more?  |              |              |                  |       |                |                  | 89                  |
| volunteer works: why not volunteer  |              |              |                  |       |                |                  | 86                  |
| helps to others (12 mos): types   |              |              |                  |       |                |                  | 86/89/94            |
| helps to others: time   |              |              |                  |       |                |                  | 86/89/94            |
| helps to others: enjoyment  |              |              |                  |       |                |                  | 86/89/94            |
| helps to others: satisfaction   |              |              |                  |       |                |                  | 86                  |
| helps to others: better/worse off for R   |              |              |                  |       |                |                  | 86                  |
| helps to others: better/worse off for others  |              |              |                  |       |                |                  | 86/89               |
| perceived support in time of need   | 92           | 94           | 92               |       |                |                  |                     |
| possibility to borrow money for emergency   | 92           | 94           | 92               |       |                | x                |                     |
| possibility to talk to someone for personal problem   | 92           | 94           | 92               |       |                | x                |                     |
| possibility to ask for care during sickness   | 92           | 94           | 92               |       |                |                  |                     |
| Perceived positive/negative social support  |              |              | 96               |       |                |                  |                     |
| Perceived care, understanding, relying on, talking about  |              |              |                  |       |                |                  |                     |

|   | WLS Grads      | WLS Sib        | Life History       | MIDUS | HRS | NSFH | ACL                    |
|---|----------------|----------------|--------------------|-------|-----|------|------------------------|
| worries, demands, criticism, let you down, on nerves<br>(family, friends, other family members, co-workers) |                |                |                    | 95    |     |      | 86/89/94               |
| Emotional, instrumental, financial support<br>support/helps at sp/children death: who (sp/children/friends) | 92             | 94             | 92                 | 95    |     | x    | 86/89/94               |
| <b>CAREGIVING, SOCIAL CONTACT AND ACTIVITIES</b>  |                |                |                    |       |     |      |                        |
| <b>Caregiving</b>   |                |                |                    |       |     |      |                        |
| disability: whom (r, sp, hh mem)  | 92             | 94             | 92/96 (since 1992) |       |     | x    |                        |
| disability: condition   | 92             | 94             | 92/96 (since 1992) |       |     | x    |                        |
| disability: ranking   | 92             | 94             | 92/96 (since 1992) |       |     | x    |                        |
| disability: caregiving  | 92             | 94             | 92/96 (since 1992) |       |     | x    |                        |
| caregiving: type  | 92             | 94             | 92/96 (since 1992) |       |     | x    |                        |
| caregiving: duration  | 92             | 94             | 92/96 (since 1992) |       |     | x    |                        |
| caregiving: frequency   | 92             | 94             | 92/96 (since 1992) |       |     | x    |                        |
| caregiving: living arrangement  | 92             | 94             | 92/96 (since 1992) |       |     | x    |                        |
| caregiving: who gives   | 92             | 94             | 92                 |       |     | x    |                        |
| caregiving to fr/rel in 12 mos: time, stressful   |                |                |                    |       |     |      | 86/89/94               |
| <b>Social Contacts</b>  |                |                |                    |       |     |      |                        |
| neighbor: freq in contact/conversation  |                |                |                    | 95    |     |      |                        |
| frequency: friends, family, friend/relatives/co-workers   |                |                |                    | 95    |     |      |                        |
| frequency: parents  | 92             | 94             | 92                 |       | x   | x    |                        |
| frequency: sibling  | 92             | 94             | 92                 |       |     | x    |                        |
| frequency: child  | 92             | 94             | 92                 |       | x   | x    | 94(16+,live elsewhere) |
| time last seeing: parents   | 92             | 94             | 92                 |       |     |      |                        |
| time last seeing: sibling   | 92             | 94             | 92                 |       |     |      |                        |
| time last seeing: child   | 92             | 94             | 92                 |       |     |      |                        |
| <b>Social/Leisure Activities or SOCIAL INTEGRATION</b>  |                |                |                    |       |     |      |                        |
| friends (freq in past 4 wks)  | 92             | 94             | 92                 |       |     | x    |                        |
| relatives (freq in past 4 wks)  | 92             | 94             | 92                 |       |     | x    |                        |
| freq in phone (social integration)  |                |                |                    |       |     |      | 86/89                  |
| freq visits with friends (social integration)   |                |                |                    |       |     | x    | 86/89                  |
| freq attending meetings (social integration)  |                |                |                    |       |     | x    | 86/89                  |
| how many nearby neighbors whom R knows by name  |                |                |                    |       | x   |      | 86/89/94               |
| freq getting together with any of these neighbors   |                |                |                    |       | x   |      |                        |
| TV/radio: hrs/wk  |                |                |                    |       |     |      | 86/89                  |
| reading: hrs/wk   |                |                |                    |       |     |      | 86/89                  |
| <b>Social Participation (level of involvement)</b>  |                |                |                    |       |     |      |                        |
| church  | 75/92          | 77/94          | 75/92              |       |     | x    |                        |
| church related groups   | 75/92          | 77/94          | 75/92              |       |     | x    |                        |
| union member  | 75/92          | 77/94          | 75/92              |       |     | x    |                        |
| veterans' organization  | 75/92          | 77/94          | 75/92              |       |     | x    |                        |
| fraternal organizations   | 75/92          | 77/94          | 75/92              |       |     | x    |                        |
| business or civic groups  | 75/92          | 77/94          | 75/92              |       |     |      |                        |
| parent-teachers' assoc  | 75/92          | 77/94          | 75/92              |       |     |      |                        |
| community centers   | 75/92          | 77/94          | 75/92              |       |     |      |                        |
| organization of people of the same nationality  | 75/92          | 77/94          | 75/92              |       |     | x    |                        |
| sport teams   | 75/92          | 77/94          | 75/92              |       |     | x    |                        |
| country clubs   | 75/92          | 77/94          | 75/92              |       |     |      |                        |
| youth groups (scout leaders etc.)   | 75/92          | 77/94          | 75/92              |       |     | x    |                        |
| professional groups   | 75/92          | 77/94          | 75/92              |       |     | x    |                        |
| political clubs or organizations  | 75/92          | 77/94          | 75/92              |       |     | x    |                        |
| neighborhood improvement organizations  | 75/92          | 77/94          | 75/92              |       |     |      |                        |
| charity or welfare organization   | 75/92          | 77/94          | 75/92              |       |     |      |                        |
| hobby groups  | 75/92          |                | 75/92              |       |     | x    |                        |
| others  | 75/92          | 77/94          | 75/92              |       |     | x    |                        |
| voting  | 75 (1974 vote) | 77 (1976 vote) | 75 (1974 vote)     |       |     |      | 89 (1988 vote)         |

|  | WLS Grads | WLS Sib | Life History | MIDUS | HRS         | NSFH | ACL                                  |
|--|-----------|---------|--------------|-------|-------------|------|--------------------------------------|
| <b>LIFE EVENT INVENTORY</b>  |           |         |              |       |             |      |                                      |
| psychological turning point in last 12 mos in job/career, interpersonal relationship, recognizing self, strength/weakness, realizing dreams: event, impact |           |         |              | 95    |             |      |                                      |
| ever homeless in the last 5 yrs  |           |         |              | 95    |             |      |                                      |
| ever institutionalized in the last 5 years   |           |         |              | 95    |             |      |                                      |
| divorce since last intvw: time to sep, time to be official   | 75/92     | 77/94   | 75/92/96     |       |             |      | 89/94                                |
| divorce since last intvw: dealing, worse/support from children/ex-sp, friend   |           |         |              |       |             | x    | 89                                   |
| death of parents: time   | 92        | 94      | 92           |       |             | x    | 94 (since 86/89)                     |
| death of close relative  |           |         |              |       |             |      | 94 (since 86/89)                     |
| serious financial problem: time, expected  |           |         |              |       |             |      | 94 (since 86/89)                     |
| physical attack or assault ever: time  |           |         |              |       |             | x    | 86/89/94(since 86/89)                |
| physical attack or assault ever: type, who   |           |         |              |       |             |      | 89                                   |
| life-threatening illness or accidents ever: time   |           |         |              |       |             |      | 86/89/94(since 86/89)                |
| life-threatening illness or accidents ever: what (type)  |           |         |              |       |             |      | 89                                   |
| life-threatening illness or accidents ever: dealing  |           |         |              |       |             |      | 86/89                                |
| serious, not life-threatening illness/injury: time   |           |         |              |       |             |      | 86/89(last 3 yrs),94(since 86 or 89) |
| serious, not life-threatening illness/injury: worse/support from spouse/children/friend  |           |         |              |       |             |      | 86                                   |
| moving to new place: time  |           |         |              |       |             |      | 86/89(last 3 yrs),94(since 86 or 89) |
| moving to new place: old address   |           |         |              |       |             |      | 86                                   |
| moving to new place: changes due to move   |           |         |              |       |             |      | 86                                   |
| lost job: time, expected   | 75/92     | 77/94   | 75/92        |       |             |      | 86/89(last 3 yrs)/94(since 86/89)    |
| robbed/burglarized: time   |           |         |              |       |             |      | 86/89(last 3 yrs)/94(since 86/89)    |
| others   |           |         |              |       |             |      | 86/89(last 3 yrs)/94(since 86/89)    |
| self reported major life event: events   |           |         | 96           |       |             |      |                                      |
| self reported major life event: time   |           |         | 96           |       |             |      |                                      |
| self reported major life event: emot strength & impact on life   |           |         | 96           |       |             |      |                                      |
| <b>PHYSICAL/MENTAL HEALTH</b>  |           |         |              |       |             |      |                                      |
| <b>Health Perception and Comparison</b>  |           |         |              |       |             |      |                                      |
| Overall health rating  | 92        | 94      | 92/96        | 95    | x           |      | 86/89/94                             |
| Health compared to same sex/age peers  | 92        | 94      | 92/96        | 95    |             | x    |                                      |
| Health change 10 yrs ago, expected 10 yrs ahead  |           |         |              | 95    | x(1 yr ago) |      |                                      |
| Health comparison  |           |         |              |       |             |      | 89 (to 86)                           |
| Appearance 10 years ago  | 92        | 94      | 92           |       |             |      |                                      |
| Appearance change since 10 yrs ago   |           |         |              | 95    |             |      |                                      |
| Overall health at age 16   |           |         |              | 95    |             |      |                                      |
| Evaluation appropriate weight (body image)   |           |         |              | 95    |             |      |                                      |
| <b>Comparing to 10 years ago ---</b>   |           |         |              |       |             |      |                                      |
| General health   | 92        | 94      | 92/96        |       |             |      |                                      |
| Appearance   |           | 94      | 96           |       |             |      |                                      |
| eyesight   |           | 94      |              |       |             |      |                                      |
| teeth  |           | 94      |              |       |             |      |                                      |
| Energy   |           | 94      |              |       |             |      |                                      |
| weight   |           | 94      |              |       |             |      |                                      |
| hearing  |           | 94      |              |       |             |      |                                      |
| hair condition   |           | 94      |              |       |             |      |                                      |

|  | WLS Grads | WLS Sib | Life History | MIDUS | HRS | NSFH | ACL      |
|--|-----------|---------|--------------|-------|-----|------|----------|
| body shape   |           | 94      |              |       |     |      |          |
| skin condition   |           | 94      |              |       |     |      |          |
| sexual pleasure  |           | 94      |              |       |     |      |          |
| strength of arms   |           | 94      |              |       |     |      |          |
| strength of legs   |           | 94      |              |       |     |      |          |
| digestive functions  |           | 94      |              |       |     |      |          |
| Comparing to 5 years ago ----                                |           |         |              |       |     |      |          |
| Energy   |           |         |              | 95    |     |      |          |
| Physical fitness   |           |         |              | 95    |     |      |          |
| Physique/figure  |           |         |              | 95    |     |      |          |
| Weight   |           |         |              | 95    |     |      |          |
| Satisfaction   |           |         |              |       |     |      |          |
| Overall health satisfaction                                  |           |         |              | 95    | x   | x    | 86/89/94 |
| Overall appearance satisfaction                              |           |         |              | 95    |     | x    |          |
| Interviewer's rating   |           |         |              |       |     |      |          |
| general health (r and sp)                                    |           |         |              |       |     |      | 86/89    |
| tiredness  |           |         |              |       | x   |      | 86/89    |
| eyesight   |           |         |              |       |     |      | 86/89    |
| hearing  |           |         |              |       | x   |      | 86/89/94 |
| walking  |           |         |              |       |     |      | 86/89    |
| understanding  |           |         |              |       | x   | x    | 86/89/94 |
| memory   |           |         |              |       | x   |      | 86/89/94 |
| Risk Rating  |           |         |              |       |     |      |          |
| heart attacks  |           |         |              | 95    |     |      |          |
| cancers  |           |         |              | 95    |     |      |          |
| Bio-Markers  |           |         |              |       |     |      |          |
| vital sign: height, weight, waist, hip, blood pressure       |           |         |              |       |     |      |          |
| peak flow, temp/pulse/resp rate,                             |           |         |              |       |     |      |          |
| visual acuity (glasses)                                      |           |         | 96           |       | x   |      |          |
| general: grip, dominant hand, apparent age, race, attitudes  |           |         | 96           |       |     |      |          |
| Skin: color/temp/texture/moisture/lesions                    |           |         | 96           |       |     |      |          |
| Nail: pigmentation, length, lesions, lines, white area       |           |         | 96           |       |     |      |          |
| Hair: distribution, texture, color                           |           |         | 96           |       |     |      |          |
| Health history volunteered by R                              |           |         | 96           |       |     |      |          |
| Lymph  |           |         | 96           |       |     |      |          |
| Skull: size, tenderness, bruit                               |           |         |              |       |     |      |          |
| Eyes: extraocular movements, nystagmus,                      |           |         |              |       |     |      |          |
| lid lesions, sclerae, conjunctivae, cornea,                  |           |         |              |       |     |      |          |
| pupils, ophthalmoscopic exam                                 |           |         | 96           |       |     |      |          |
| Ears: hearing, bone conduction, pinnae, external canal, drum |           |         | 96           |       |     |      |          |
| Nose: Mucous membranes, sinus tenderness                     |           |         | 96           |       |     |      |          |
| Mouth: Lip color, lip moisture, lip lesions,                 |           |         |              |       |     |      |          |
| odor of breath, salivary pool, tongue,                       |           |         |              |       |     |      |          |
| teeth, gums, buccal mucosa, torus                            |           |         | 96           |       |     |      |          |
| Throat: Uvula, posterior pharynx, voice quality              |           |         | 96           |       |     |      |          |
| Neck: ROM, tenderness, thyroid size, bruit,                  |           |         |              |       |     |      |          |
| tracheal position, salivary glands                           |           |         | 96           |       |     |      |          |
| Thorax and lungs: inspection, palpation, percussion,         |           |         | 96           |       |     |      |          |
| auscultation   |           |         |              |       |     |      |          |
| Cardiovascular: jugular, apical, auscultation,               |           |         |              |       |     |      |          |
| murmurs, friction rub, pulses, peripheral vascular,          |           |         |              |       |     |      |          |
| arterial bruits, venous distension, pulsation,               |           |         |              |       |     |      |          |
| tenderness, or inflammation abnormal venous pattern          |           |         | 96           |       |     |      |          |
| over chest/abdomen   |           |         |              |       |     |      |          |
| Abdomen: Organs, Hernias, auscultation                       |           |         | 96           |       |     |      |          |
| Musculoskeletal: Muscles, spine, joints, tender pts          |           |         | 96           |       |     |      |          |

|   | WLS Grads | WLS Sib | Life History       | MIDUS | HRS            | NSFH | ACL               |
|---|-----------|---------|--------------------|-------|----------------|------|-------------------|
| Mental State: grooming, affect, activity, speech, mood, sensorium |           |         | 96                 |       |                |      |                   |
| Neurophysiological measures                                       |           |         |                    |       |                |      |                   |
| Hand usage  |           |         |                    |       |                |      |                   |
| in various situations   |           |         | 96                 |       |                |      |                   |
| forced to change (when, how, why)                                 |           |         | 96                 |       |                |      |                   |
| Functional Status   |           |         |                    |       |                |      |                   |
| Eyesight: problems, corrections                                   |           |         |                    |       | x(self-rating) |      | 86                |
| Hearing: problems, corrections                                    |           |         |                    |       | x(self-rating) |      | 86                |
| Employment disability (full)                                      |           |         |                    | 95    | x              | x    |                   |
| Disability limits work for pay (respondent)                       |           |         |                    |       | x              | x    |                   |
| Disability limits work for pay (spouse)                           |           |         |                    |       | x              |      |                   |
| Employment interruption by health reasons                         | 92        | 94      |                    |       | x              |      |                   |
| Length of employment disability (full)                            |           |         |                    | 95    | x              |      |                   |
| Health lead to cutback in work activities                         |           |         |                    | 95    | x              |      |                   |
| major health problem(s)   |           |         |                    |       |                |      | 86(3)/89(1)/94(3) |
| disability due to health problem(s)                               |           |         |                    |       |                |      | 86(3)/89(1)/94(3) |
| Functional disability due to illness                              |           |         |                    |       | x              | x    |                   |
| ADL(modified IADL & ADL) limited                                  | 92        | 94      |                    | 95    | x              | x    | 86/89/94          |
| Need help with basic ADLs (Rs 55+)                                |           |         |                    |       |                | x    |                   |
| Received care for illness/last 12mo.                              | 92        | 94      | 92                 |       |                | x    |                   |
| Received help with basic ADLs (12 mos)                            | 92        | 94      | 92                 |       |                |      |                   |
| disability in hh: whom (r, sp, hh mem)                            | 92        | 94      | 92/96 (since 1992) |       |                | x    |                   |
| disability in hh: condition                                       | 92        | 94      | 92/96 (since 1992) |       |                | x    |                   |
| disability in hh: ranking   | 92        | 94      | 92/96 (since 1992) |       |                | x    |                   |
| disability in hh: caregiving                                      | 92        | 94      | 92/96 (since 1992) |       |                | x    |                   |
| Diseases, Illnesses, and Medical Conditions                       |           |         |                    |       |                |      |                   |
| anemia  | 92        | 94      | 92/96              | 95    |                |      |                   |
| asthma  | 92        | 94      | 92/96              | 95    | x              | x    |                   |
| arthritis   | 92        | 94      | 92/96              | 95    | x              | x    | 86/89/94          |
| bronchitis or emphysema   | 92        | 94      | 92/96              | 95    |                | x    |                   |
| lung diseases   |           |         |                    | 95    | x              |      | 86/89/94          |
| cancer  | 92        | 94      | 92/96              | 95    | x              | x    | 86/89/94          |
| chronic liver   | 92        | 94      | 92/96              | 95    |                | x    |                   |
| diabetes  | 92        | 94      | 92/96              | 95    | x              | x    | 86/89/94          |
| serious back  | 92        | 94      | 92/96              | 95    | x              |      |                   |
| heart trouble   | 92        | 94      | 92/96              | 95    | x              | x    | 86/89/94          |
| high blood pressure   | 92        | 94      | 92/96              | 95    | x              |      | 86/89/94          |
| stroke  |           |         |                    | 95    | x              |      | 86/89/94          |
| kidney/bladder  | 92        | 94      | 92/96              | 95    | x              |      |                   |
| ulcer   | 92        | 94      | 92/96              | 95    |                | x    |                   |
| stomach   |           |         |                    | 95    | x              |      |                   |
| allergies   | 92        | 94      | 92/96              | 95    |                |      |                   |
| ms  | 92        | 94      | 92/96              | 95    |                |      |                   |
| fracture  |           |         |                    | 95    | x              |      | 86/89/94          |
| colitis   | 92        | 94      | 92/96              | 95    |                | x    |                   |
| circulation problem   |           | 94      | 92/96              | 95    |                |      |                   |
| urine   |           |         |                    | 95    |                |      | 86/89/94          |
| feet and legs   |           |         |                    | 95    | x              |      | 86/89/94          |
| high cholesterol  |           | 94      | 92/96              | 95    | x              |      |                   |
| anxiety/depression  |           |         |                    | 95    |                |      |                   |
| alcohol/drug abuse  |           |         |                    | 95    |                |      |                   |
| others  | 92        | 94      | 92/96              |       |                |      |                   |
| cancers, in various type  |           |         |                    | 95    | x              |      | 86/89/94          |
| heart attack (ever)   |           |         |                    | 95    | x              |      | 86/89/94          |
| Diagnosis of angina or other heart problems                       |           |         |                    | 95    | x              |      |                   |

|  | WLS Grads | WLS Sib | Life History | MIDUS | HRS | NSFH             | ACL      |
|--|-----------|---------|--------------|-------|-----|------------------|----------|
| <b>Physical Symptoms</b>                     |           |         |              |       |     |                  |          |
| energy                                       | 92        | 94      | 92/96        | 95    |     |                  |          |
| trouble sleep                                | 92        | 94      | 92/96        | 95    |     |                  |          |
| fatigue/exhaustion                           | 92        | 94      | 92/96        | 95    |     | x                |          |
| headaches                                    | 92        | 94      | 92/96        | 95    |     |                  |          |
| visual problem                               | 92        | 94      | 92/96        | 95    |     |                  |          |
| dizziness                                    | 92        | 94      | 92/96        | 95    |     |                  | 86/89/94 |
| heart bit hard                               |           |         |              | 95    |     |                  | 86/89/94 |
| numbness                                     | 92        | 94      | 92/96        | 95    |     |                  |          |
| ringing                                      | 92        | 94      | 92/96        | 95    |     |                  |          |
| nausea                                       | 92        | 94      | 92/96        | 95    |     |                  |          |
| vomit  | 92        | 94      | 92/96        | 95    |     |                  |          |
| upset stomach                                | 92        | 94      | 92/96        | 95    |     |                  |          |
| constipation                                 | 92        | 94      | 92/96        | 95    |     |                  |          |
| diarrhea                                     | 92        | 94      | 92/96        | 95    |     |                  |          |
| urination                                    | 92        | 94      | 92/96        | 95    |     |                  | 86/89/94 |
| aching muscles                               | 92        | 94      | 92/96        | 95    |     |                  |          |
| stiff/swollen joint                          | 92        | 94      | 92/96        | 95    |     |                  |          |
| back pain                                    | 92        | 94      | 92/96        | 95    | x   |                  |          |
| chest pain                                   | 92        | 94      | 92/96        | 95    |     |                  |          |
| shortness of breath                          | 92        | 94      | 92/96        | 95    |     |                  | 86/89/94 |
| excess sweating                              | 92        | 94      | 92/96        | 95    |     |                  |          |
| respiratory problems                         | 92        | 94      | 92/96        | 95    |     |                  |          |
| skin problems                                | 92        | 94      | 92/96        | 95    |     |                  |          |
| coughing/wheezing                            | 92        | 94      | 92/96        | 95    |     |                  |          |
| bone pains                                   |           | 94      |              | 95    |     |                  |          |
| palpitations                                 |           | 94      |              | 95    |     |                  |          |
| painful sexual intercourse                   |           | 94      |              | 95    |     |                  |          |
| hearing loss                                 |           |         | 96           | 95    |     |                  |          |
| teeth or gum                                 |           |         | 96           | 95    |     |                  |          |
| trouble swallowing                           |           |         | 96           | 95    |     |                  |          |
| shaking or tremors                           |           |         | 96           | 95    |     |                  |          |
| others                                       | 92        | 94      | 92/96        |       |     |                  |          |
| Symptoms, shortness of breath (revised Rose) |           |         |              | 95    |     |                  |          |
| Symptoms of angina (Rose index)              |           |         |              | 95    |     |                  |          |
| <b>Body Size</b>                             |           |         |              |       |     |                  |          |
| BMI (height/weight)                          | 92        | 94      | 92/96        | 95    | x   | x (see footnote) | 86/89/94 |
| Waist/Hip                                    |           |         | 96           | 95    |     |                  |          |
| Weight one year ago                          |           |         |              | 95    | x   |                  |          |
| Weight at 21 yrs old                         |           |         |              | 95    |     |                  |          |
| 10 lbs lost/gain in past 12 months? Why?     |           |         | 96           | 95    |     |                  |          |
| Lifetime times 10+ lbs lost                  |           |         |              | 95    |     |                  |          |
|  |           |         |              |       |     |                  |          |
| <b>NUTRITION INFORMATION</b>                 |           |         |              |       |     |                  |          |
|  |           |         |              |       |     |                  |          |
| <b>MENTAL HEALTH</b>                         |           |         |              |       |     |                  |          |
| General mental/emotional health              |           |         | 96           | x     | x   |                  |          |
| Stress                                       |           |         |              |       |     |                  |          |
| family stress spill over work                | 92        | 94      | 92/96        | 95    |     | x                |          |
| work stress spill over family                | 92        | 94      | 92/96        | 95    |     | x                |          |
| family enhancement spill over work           | 92        | 94      | 92/96        |       |     |                  |          |
| family stress                                |           |         |              | 95    |     |                  |          |
| work stress                                  |           |         |              | 95    |     |                  |          |
| Depression                                   |           |         |              |       |     |                  |          |
| CES-D  | 92        | 94      | 92/96        | 95    | x   | x                | 86/89/94 |
| earliest age                                 | 92        | 94      | 92/96        | 95    |     |                  | 89       |

|  | WLS Grads | WLS Sib | Life History | MIDUS | HRS | NSFH | ACL                   |
|--|-----------|---------|--------------|-------|-----|------|-----------------------|
| duration   | 92        | 94      | 92/96        | 95    |     |      |                       |
| age at most serious                                    | 92        | 94      | 92/96        | 95    |     |      |                       |
| times (frequency)                                      | 92        | 94      | 92/96        | 95    |     |      |                       |
| age at most recent                                     | 92        | 94      | 92/96        |       |     |      | 89/94 (comp to 86/89) |
| life time: freq, duration, spacing                     | 92        | 94      | 92/96        |       |     |      | 86(ever)/89(freq)     |
| most serious (last year): freq, duration               |           |         |              |       |     |      | 86/89                 |
| comparison to last week                                |           |         |              |       |     |      | 86/94                 |
| suicide attempts (frequency, first/last time)          |           |         | 96           |       |     |      |                       |
| impact on social/work life                             |           |         | 96           |       |     |      |                       |
| hospitalization/professional help/medication           |           |         | 96           |       |     |      |                       |
| Interviewer's rating: depressed                        |           |         |              |       |     |      | 86/89/94              |
| SAD (when)   |           |         | 96           |       |     |      |                       |
| Anxiety (scale)  |           | 94      | 96           | 95    |     |      |                       |
| Hostility (scale)                                      | 92        | 94      | 92/96        |       |     | x    |                       |
| Panic attacks, last 12 months                          |           |         | 96           | 95    |     |      |                       |
| Dysphoria, past month                                  |           |         |              | 95    |     |      |                       |
| Positive affect, past month                            |           |         |              | 95    |     |      |                       |
| Substance Abuse (various type of substances)           |           |         |              | 95    |     |      |                       |
| <b>HEALTH SERVICE UTILIZATION AND HOSPITALIZATION</b>  |           |         |              |       |     |      |                       |
| <b>Medical Treatment and Drugs</b>                     |           |         |              |       |     |      |                       |
| Treatment for heart trouble                            |           |         |              | 95    | x   |      |                       |
| Heart procedures ever done                             |           |         |              | 95    |     |      |                       |
| Treatment for cancer                                   |           |         |              |       | x   |      |                       |
| Treatment for lung condition                           |           |         |              |       | x   |      |                       |
| Treatment for diabetes                                 |           |         |              |       | x   |      |                       |
| Treatment for high blood pressure                      |           |         |              | 95    |     |      |                       |
| Treatment for arthritis or rheumatism                  |           |         |              |       | x   |      |                       |
| Most recent operation (anesthetized)                   |           |         |              | 95    |     |      |                       |
| Taking any medications for stroke                      |           |         |              | 95    | x   |      |                       |
| Taking any medications for high blood pressure         |           |         |              | 95    | x   |      |                       |
| Taking any medications for depression/anxiety          |           |         | 96           |       |     |      |                       |
| Prescription meds taken for various conditions         |           |         | 96           | 95    |     |      |                       |
| Non-prescrip drugs last 12 months (freq)               |           |         |              | 95    |     |      |                       |
| Consequence (family/work/school) of non-prescrip drugs |           |         |              | 95    |     |      |                       |
| <b>Hospitalization</b>                                 |           |         |              |       |     |      |                       |
| Illness bed days/last yr                               | 92        | 94      | 92           |       | x   |      | 86/89/94 (3mos)       |
| Frequency (last year)                                  | 92        | 94      | 92           |       |     |      |                       |
| Reason (longest stay)                                  | 92        | 94      | 92           |       |     |      |                       |
| Duration (longest stay)                                | 92        | 94      | 92           |       |     |      |                       |
| Self care minutes                                      |           |         |              |       | x   |      |                       |
| # of admission to hospital over 1 yr                   | 92        | 94      | 92           |       | x   |      |                       |
| # of night stayed in hospital                          |           |         |              |       | x   |      | 86/89/94 (6mos)       |
| # of admission to nursing home over 1 yr               |           |         |              |       | x   |      |                       |
| time stayed in nursing home                            |           |         |              |       | x   |      | 86/89/94 (6mos)       |
| for mental health problem                              |           |         | 96           |       |     |      |                       |
| <b>Physical Exams Reported</b>                         |           |         |              |       |     |      |                       |
| complete health exam, last 12 months                   | 92        | 94      | 92           |       |     |      |                       |
| dental check-up, past 12 months                        |           | 94      |              |       |     |      |                       |
| stress test, past 12 months                            |           | 94      |              |       |     |      |                       |
| cholesterol test, past 12 months                       |           | 94      |              |       |     |      |                       |
| blood pressure, past 12 months                         |           | 94      |              |       |     |      |                       |
| when last blood pressure test                          |           |         |              | 95    |     |      |                       |
| chest x-ray, past 12 months                            |           | 94      |              |       |     |      |                       |
| prostate exam, past 12 months                          |           | 94      |              |       |     |      |                       |
| pap smear, past 12 months                              |           | 94      |              |       |     |      |                       |

|   | WLS Grads | WLS Sib | Life History | MIDUS          | HRS | NSFH             | ACL                        |
|---|-----------|---------|--------------|----------------|-----|------------------|----------------------------|
| mammogram, past 12 months   |           | 94      |              |                |     |                  |                            |
| <b>Other Health Service Utilization</b>   |           |         |              |                |     |                  |                            |
| # of doctor visits in 1 yr  |           |         |              |                | x   |                  | 86/89 (6mos),<br>94 (3mos) |
| frequency, routine physical/dentist/optician, last 12 months                            |           |         |              | 95             | x   |                  |                            |
| one place of medical care, own doctor   |           |         |              | 95             | x   |                  |                            |
| Last blood pressure reading   |           |         |              | 95             | x   |                  |                            |
| Alternative Medicine  |           |         |              | 95             |     |                  |                            |
| Vitamins and supplements taken regularly  |           |         | 96           | 95             | x   |                  |                            |
| Seeing mental health professionals  |           |         | 96           | 95             | x   |                  |                            |
| # of visits to mental health professionals  |           |         |              | 95             | x   |                  | 86/89 (3mos)               |
| Self Help Group (past 12 months)  |           |         |              | 95             |     |                  |                            |
| Health reminder in life (who)   |           |         |              |                |     |                  | 86                         |
|   |           |         |              |                |     |                  |                            |
| <b>WOMEN'S REPRODUCTIVE HEALTH AND MENOPAUSE</b>  |           |         |              |                |     |                  |                            |
| contraceptive pills: duration   |           | 94      |              |                |     |                  |                            |
| contraceptive pills: cur usage  |           | 94      |              | (past 30 days) |     |                  |                            |
| sterilization   |           | 94      |              |                |     | x                |                            |
| menstruating: first time  |           | 94      |              | 95             |     |                  |                            |
| menstruating: frq of discomfort   |           | 94      |              | 95             |     |                  |                            |
| menstruating: most recent period  |           | 94      |              | 95             |     |                  |                            |
| menstruating: why stop  |           | 94      |              | 95             |     |                  |                            |
| perimenopause: symptoms   |           | 94      |              |                |     |                  |                            |
| menopause: time   | 92        | 94      | 92           | 95             |     |                  |                            |
| menopause: surgery (type, age, reasons,<br>others' attitudes)                           | 92        | 94      | 92           | 95             |     |                  |                            |
| menopause: hormone (age, duration, cur use,<br>by types, reasons, attitudes/preference) | 92        | 94      | 92           | 95 (some)      |     |                  |                            |
| menopause: symptoms   | 92        | 94      | 92           |                |     |                  |                            |
| menopause: consequence (family, work, self-image)                                       | 92        | 94      | 92           | 95             |     |                  |                            |
| menopause: knowledge on menopause   | 92        | 94      | 92           |                |     |                  |                            |
|   |           |         |              |                |     |                  |                            |
| <b>ALCOHOL/DRINKING</b>   |           |         |              |                |     |                  |                            |
| ever drink  | 92        | 94      | 92/96        |                |     |                  | 86/89/94                   |
| ever drinking regularly   | 92        | 94      | 92/96        | 95             | x   | x                | 94                         |
| when quit   |           |         |              |                |     |                  | 94                         |
| reason to quit  |           |         |              |                |     |                  | 94                         |
| when begin  | 92        | 94      | 92/96        | 95             | x   |                  |                            |
| frequency (past month)  | 92        | 94      | 92/96        | 95             | x   | x                | 86/89/94                   |
| quantity  | 92        | 94      | 92/96        | 95             |     | x                | 86/89/94                   |
| frequency for 5+ drinks (past month)  | 92        | 94      | 92/96        |                |     | x (see footnote) |                            |
| greatest quantity, age  |           |         |              | 95             |     |                  |                            |
| use more than intended  |           |         |              | 95             |     |                  |                            |
| modified MAST   |           |         |              | 95             | x   | x                |                            |
| consequences (MAST)   | 92        | 94      | 92/96        |                |     |                  |                            |
| problem drinkers in hh (childhood)  | 92        | 94      | 92/96        |                |     |                  |                            |
| problem drinkers in hh ever   | 92        | 94      | 92/96        |                |     | x                |                            |
|   |           |         |              |                |     |                  |                            |
| <b>SMOKING</b>  |           |         |              |                |     |                  |                            |
| current smoking   | 92        | 94      | 92           | 95             | x   |                  | 86/89/94                   |
| ever smoking  | 92        | 94      | 92           | 95             | x   |                  | 86/89                      |
| duration  | 92        | 94      | 92           | 95             |     |                  |                            |
| when quit or start  |           | 94      | 96           | 95             | x   |                  | 94                         |
| amount  | 92        | 94      | 92           | 95             | x   |                  | 86/89/94 (curr)            |
|   |           |         |              |                |     |                  |                            |
| <b>EXERCISE</b>   |           |         |              |                |     |                  |                            |

|  | WLS Grads | WLS Sib | Life History | MIDUS | HRS | NSFH | ACL   |
|--|-----------|---------|--------------|-------|-----|------|-------|
| light physical activity (in frequency)   | 92        | 94      | 92/96        | 95    | x   |      |       |
| vigorous physical activity (in frequency)  | 92        | 94      | 92/96        | 95    | x   |      |       |
| physical activities in summer and winter   |           |         |              | 95    |     |      |       |
| physical activities: gardening, walk   |           |         |              |       |     |      | 86/89 |
| active sports: in freq   |           |         |              |       |     |      | 86/89 |
| <b>SLEEP</b>   |           |         |              |       |     |      |       |
| # of hrs/ per day  |           |         |              |       |     |      | 86/89 |
| physical symptom: trouble sleeping   | 92        | 94      | 92/96        | 95    |     |      |       |
| menopause symptom -- trouble sleeping  | 92        | 94      | 92           | 95    |     |      |       |
| <b>THE END OF LIFE</b>   |           |         |              |       |     |      |       |
| death  | 92        | 94      | 92           |       | x   | x    |       |
| cause of death   | 92        | 94      | 92           |       | x   | x    |       |
| death place  | 92        | 94      | 92           |       | x   |      |       |
| death date   | 92        | 94      | 92           |       | x   | x    |       |
| Social Security Number   | 92        | 94      | 92           |       | x   |      |       |
| <b>*We consider this a work in progress, and we welcome corrections and suggestions for expansion of this summary material.</b>  |           |         |              |       |     |      |       |
| NOTES  |           |         |              |       |     |      |       |
| 1. Spouse section  |           |         |              |       |     |      |       |
| In this section, variables are limited to those collected from the respondents, that is, proxy report. Since HRS, NSFH II, and ACL also interviewed current spouses, one can obtain spousal information by matching household records. This also applies to a handful of WLS graduate couples. Please read footnotes 5, 7, and 8 in Table 1.   |           |         |              |       |     |      |       |
| 2. Physical symptoms and medical conditions  |           |         |              |       |     |      |       |
| In both WLS surveys, the physical symptom is self-reported incidence occurred in the last 6 months and the medical condition is reported as diagnosed by a medical professional. In MIDUS and ACL, both are measured as self-reported incidence occurred in the last 12 months or diagnosed by a medical professional. NSFH87 did not have a checklist, but asked about disabling conditions. The conditions are from NSFH92. Additionally, WLS also ask the degree of discomfort from the physical symptom and the degree of interference with life from the medical condition. |           |         |              |       |     |      |       |
| 3. Life History Data and open-ended questions  |           |         |              |       |     |      |       |
| Life History Survey has many open-ended questions that do not appear in their codebooks. Therefore, it was not possible to document any more details for this data set. For more information on these data, contact Carol Ryff at The Institute on Aging, University of Wisconsin-Madison, Madison, Wisconsin, USA.  |           |         |              |       |     |      |       |
| 4. NSFH  |           |         |              |       |     |      |       |
| Many NSFH questions about parenting, family background, and siblings are reported by the focal children. So the reader should check with the NSFH codebook to be certain who these questions are being asked about.  |           |         |              |       |     |      |       |

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