Longitudinal Study of Ageing in a Retirement Community (LARC)

The initial three-year phase of LARC began in June 2006 with the aim of exploring the development and implications of the new purpose-built retirement community at Denham Garden Village (DGV), Buckinghamshire. More broadly, the study is designed to examine longitudinal changes within the Village and responses to this new form of care and accommodation for ageing populations. It does so using a range of methodological approaches, including biannual surveys of the resident population of DGV alongside qualitative methods involving observation, diary-keeping, interviews and photographic/audio-visual work.

Summary findings are available on the website: www.keele.ac.uk/larc

Anchor

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For more information contact:
The LARC research team
Centre for Social Gerontology
Keele University
Staffordshire
ST5 5BG
UK

Telephone: +44 (0)1782 733844
Email: larc@ilcs.keele.ac.uk
Website: www.keele.ac.uk/larc

© The LARC research team (Bernadette Bartlam, Miriam Bernard, Jennifer Liddle, Thomas Scharf and Julius Sim)
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Introduction

In this technical report, the focus is on the second survey of residents conducted in 2009 (Wave 2). The technical report describes the survey design, sampling, data collection and fieldwork procedures, and the processing of the survey data.

Survey design

The LARC Wave 2 survey was designed to collect a range of information from the residents of DGV at a point when the retirement community was still being developed. At the time of data collection (April–August 2009), the resident population was comprised of two main groups:

- Longstanding residents who had lived in DGV through the change in ownership of the Village from the Licensed Victuallers National Homes (LVNH) to Anchor Trust; and
- More recently arrived residents who had moved into DGV subsequent to Anchor Trust assuming ownership of the site.

A baseline survey in 2007 captured information relating to each of these sub-groups, but was completed at a point when a relatively small number of new residents had moved into the village. The Wave 2 survey was developed to collect data from residents who had moved into the village since the baseline survey took place and, in some cases, from longstanding residents who chose not to take part in the initial survey. In addition, the survey provided an opportunity to collect data from residents who took part in the Wave 1 survey, to allow comparisons to be drawn over time at both the individual and the community level.

The survey took the form of a structured questionnaire, administered in face-to-face interviews by researchers from Keele University. The questionnaire was based on the questionnaire used for the Wave 1 survey (see LARC Wave 1 survey technical report), and was designed to provide data that were relevant both to the particular circumstances of DGV and to a wider population of older people. In this context, the questionnaire drew upon material arising from:

- Previous work undertaken in purpose-built retirement communities by members of the research team (for example, Bernard et al. 2004, Bernard et al. 2007);
- Previous and current work being undertaken in purpose-built retirement communities by other research teams (for example, Croucher et al. 2003, Croucher et al. 2006, Darton et al. 2005, Dawson et al. 2006, Evans and Vallelly 2007, Vallelly et al. 2006);
- Previous and current work undertaken by members of the research team in other geographic settings (for example, Phillipson et al. 2001, Scharf et al. 2002, Smith et al. 2004);
• Wider surveys of the older population (for example, English Longitudinal Study of Ageing); and
• Analyses of key social phenomena of relevance in later life (for example, measures of well-being, loneliness, and social support networks).

The questionnaire thus incorporated a combination of established questions and measures that permit comparison between DGV and other settings, as well as questions that are likely to be relevant only to the particular situation at DGV. Moreover, bearing in mind the longitudinal nature of the LARC project, the questionnaire included items that would allow comparisons to be drawn over time.

Questionnaire content

The key topics covered in the questionnaire were:

• Socio-demographic data (including age, sex, ethnicity, marital status, household composition, education and training, housing tenure and length of residence at DGV);
• Work and employment (identifying the main occupations of the respondent and, where relevant, spouses/partners during their working lives, and providing a measure of socio-economic status);
• Housing (including previous housing history, reasons for moving to DGV, and satisfaction with accommodation and DGV as a place to live);
• Mobility within and beyond DGV (including access to and use of a car, and other means of getting around, and ease of access to and frequency of use of facilities within and beyond DGV);
• Satisfaction with facilities at DGV;
• Physical health, mental health and well-being (encompassing broad measures of respondents’ health and well-being, as well as data about specific medical conditions and use of primary care services);
• Social and civic activities (participation in a range of social, civic and leisure activities within and beyond DGV);
• Family and social relationships (including social network composition, proximity of family and friends, frequency and form of contact with family, friends and neighbours, and loneliness);
• Help, care and support (identifying the nature and sources of any help or support that is needed, and satisfaction with such support);
• Income and wealth (addressing the sources and types of personal income available, ability to manage on finances, and the relative affordability of DGV); and
• Future expectations (including the extent to which DGV represents a ‘home for life’).

Details of the sources of the questions and measures used in the questionnaire are appended to this report (see Appendix 1).
The questionnaire ended with a series of questions for the interviewer. These addressed the circumstances of the interview, including who was present at the interview, and characteristics that might have affected the course of the interview (such as the respondent’s ability to read the showcards). Interviewers were encouraged to write additional comments relevant to the interview on a blank page of the questionnaire.

The Wave 1 questionnaire was originally piloted and amended ahead of data collection in 2007 (see Wave 1 technical report). However, a number of changes were made to this questionnaire for the Wave 2 survey. Additional questions were added in several sections of the questionnaire to collect more information around certain topics. In particular, a stronger focus was placed on social activities and care and support. A few questions were modified to improve their flow, or their applicability to residents living in a retirement village.

In order to limit the burden placed on residents and maintain response rates, the research team felt it important that the time required to administer the Wave 2 questionnaire was not increased substantially. The inclusion of additional questions therefore necessitated prioritising other questions in order to make decisions about which questions to cut. In addition, two versions of the questionnaire were developed in order to remove the need for previous respondents to answer some sociodemographic questions again.

The main changes to the questionnaire following Wave 1 data collection were:

**Socio-demographic data**
- Removal of question about presence of pets
- Insertion of question relating to LVNH scheme

**Work and employment**
- Insertion of question about reasons for retirement

**Living in Denham**
- Insertion of questions about outdoor space and parking
- Insertion of question about desired changes to property
- Insertion of question about relationships between residents who have bought and those who are renting their properties
- Removal of question about mixing of people with differing states of health
- Insertion of questions about community in the village
- Addition of other facilities in the village to questions on use and evaluation

**Physical health, mental health and well-being**
- Insertion of CES-D 10 depression scale
- Insertion of questions about accessing the GP practice at which the resident is registered
- Removal of age identity questions
- Removal of question on religiosity for previous respondents

**Social and civic activities**
- Additional activities added to frequency of participation questions
Family and social relationships
• Separate questions on postal and electronic (e.g. email) contact with relatives
• Removal of questions on independence

Help, care and support
• Insertion of question about tasks causing difficulties
• Insertion of questions about provision of help for others
• Modification of income and wealth questions to reflect current types of benefit/allowance
• Insertion of question about affordability of other items

Main data collection and fieldwork procedures

Contacting respondents
All residents named on a list supplied by staff at DGV were sent letters informing them that the survey would be taking place. Three versions of the letter were written (Appendices 2, 3 and 4) to try to maximize responses from residents who had taken part in the Wave 1 survey, as well as residents who had not taken part or had moved into the village after the Wave 1 fieldwork took place. An information sheet about the survey was also enclosed, informing residents that a member of the research team would contact them to invite them to take part in the survey (Appendix 5).

Members of the research team attempted contact by telephone with all residents on the list. All members of the research team followed a guideline document (Appendix 6) when telephoning residents. In response to informal advice from residents and DGV staff, residents were telephoned after 10am whenever possible, unless an earlier time had specifically been requested in a previous conversation.

Each resident was telephoned on several occasions until one of the following occurred:
• An interview was arranged;
• The resident refused an interview;
• A minimum of 10 unanswered calls had been made; or
• The research team were advised by the resident’s partner or staff at DGV that the resident was ineligible.

A village conference was held by the research team on 19th May 2009 with the aim of raising the profile of the survey (and the research more generally), and providing feedback on data already collected. Residents were invited to book appointments for the survey at the conference. Other measures taken to inform residents of the on-going fieldwork included the use of posters on noticeboards in public areas of DGV, and an item in the May 2009 LARC newsletter. Members of the research team also spoke at monthly Residents’ Forum meetings in the village before and during the fieldwork to remind residents about the survey and emphasize its importance.
Data collection
Fieldwork took place between 27 April and 6 August 2009. Face-to-face interviews were conducted by the five members of the LARC research team and two PhD students supervised by LARC team members at Keele. Previous experience of administering self-completion questionnaires to a similar population had revealed an undesirably high level of missing data, and this approach was not therefore adopted for this study. Moreover, owing to the longitudinal nature of the study, minimizing item non-response was considered a priority.

Residents who had agreed to participate were asked to sign a consent form (Appendix 7). All residents that took part in the survey were sent a card thanking them for their participation.

Length of interview
Most interviews took at least an hour to complete, though some took considerably longer.

Response
The sampling frame for the survey was the list of residents (n=275) supplied to the research team by staff at DGV. Given the focus in the study on individuals rather than households, all named residents were potentially eligible for interview. However, some individuals were deemed ineligible because they had not yet moved into DGV, were away for the entire fieldwork period, had significant mental or physical health problems, or had died.

Table 1 summarizes the response to the LARC Wave 2 survey. Of the 248 eligible individuals, 156 (63 per cent) were interviewed. The 92 individuals who were not interviewed consisted of 87 residents (35 per cent) who refused to take part in the survey and 5 residents (2 per cent) who indicated a willingness to take part in the survey, but who for one reason or another were subsequently not available for interview (for example, because they were at work, or about to move house or go on holiday). The most commonly given reason for refusing to take part in the survey was related to individuals’ state of health (n=24).

A total of 122 individuals were interviewed at Wave 1; 72 (59%) of these respondents were interviewed again at Wave 2. Thirteen Wave 1 respondents had died or moved out of the village before fieldwork for the Wave 2 survey began. Of the 109 previous respondents living in the village at the start of Wave 2 fieldwork, 3 were ineligible due to significant health problems, and 1 respondent died during the fieldwork period. Seventy-two (69%) of the remaining 105 eligible Wave 1 respondents were interviewed at Wave 2.

Eighty-four (51%) individuals were interviewed from the total 166 individuals living in the village at the start of fieldwork who did not take part in the Wave 1 survey, or who moved to DGV after the survey took place. 29 individuals had died or moved out of the village before fieldwork for Wave 2 began. Of the 166 individuals, 8 were ineligible due to significant health problems, 5 moved out or had not moved in, 1 died during the period of fieldwork, 6 were away for
the entire fieldwork period, and 3 were not contactable. 59% of the 143 eligible ‘new’ individuals were interviewed at Wave 2.

Table 1: Response to LARC Wave 2 survey

<table>
<thead>
<tr>
<th></th>
<th>Number of individuals</th>
<th>Percentage of total sample</th>
<th>Percentage of eligible sample</th>
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<tr>
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<td>1</td>
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<td>away for entire fieldwork period</td>
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<td>2</td>
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<td>not yet moved in</td>
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<td>1</td>
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<td>deceased</td>
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<td>1</td>
<td>1</td>
</tr>
<tr>
<td>moved out</td>
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<td>1</td>
<td>1</td>
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<td>Total eligible individuals</td>
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<td>Total refusals/not available</td>
<td>92</td>
<td>37</td>
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Ethical issues

An important aspect of LARC – both for the initial three-year study and for the longer project – is obtaining appropriate ethical and access permissions and respecting the privacy of residents, staff and others involved in the research. Ethical issues are likely to arise throughout the course of any research project and relate both to the roles and responsibilities of the research team, and to the ways in which the study is conducted. LARC as a whole is guided by a number of ethical codes of practice, including:


• The Research Institute for Life Course Studies’ (Keele University) policy on ‘lone working’. See: http://www.keele.ac.uk/research/lcs/membership/docs/Lone%20Working%20Policy.pdf

The work falls under the scrutiny of the Faculty Research Ethics Committee at Keele University. The committee in turn reports to the University’s Research Ethics Committee. The study undergoes periodic ethical review through these Committees as necessary. In addition, the members of the research team have all undergone a Criminal Records Bureau check.

All residents (both existing and new) receive a welcome letter and written information about the study. Every attempt is also made to bring the presence of the researchers to the attention of residents and staff, including the wearing of identification badges. In accordance with accepted ethical practice and with the Data Protection Act (1998), participants’ individual consent is sought, in writing, prior to their involvement in the different aspects of the study. They are informed that quotations from them may be used in reports or presentations, but that their identity – and that of anyone they might refer to – will be concealed.

All residents are given unique identifiers. These are substituted for real names in all documents, unless individuals request otherwise. All documents are archived electronically on Keele University’s storage facility (Blackboard), to which only LARC researchers and key IT support personnel have access. The list detailing the unique identifiers and real names is stored separately from other documentation and is second password protected. In addition, it is a policy of the research team not to use email to send any material that might inappropriately identify residents or staff. Any material that might be considered sensitive in terms of data protection is uploaded to Blackboard (which can be accessed off site by the research team), and thereafter only stored there.

In these ways, the LARC team attempts to adhere to the principles of sound ethical research practice and governance, to minimize the risks entailed in empirical work of this nature, and to exercise appropriate professional judgement if and when presented with specific ethical dilemmas.
References


Appendix 1

LARC Wave 2 survey 2009: sources of questions

<table>
<thead>
<tr>
<th>Themes</th>
<th>Items/measures</th>
<th>Source</th>
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</thead>
<tbody>
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<td><strong>Socio-demographic data</strong></td>
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<td>Sex</td>
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<td>HCQ</td>
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<tr>
<td>Date of birth</td>
<td>A2</td>
<td>Census 2001</td>
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<tr>
<td>Age</td>
<td>A3</td>
<td>HCQ</td>
</tr>
<tr>
<td>Ethnicity</td>
<td>A4</td>
<td>Census 2001</td>
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<tr>
<td>Education/training</td>
<td>A5-A9</td>
<td>NALS 2002</td>
</tr>
<tr>
<td>Marital status</td>
<td>A10</td>
<td>HCQ</td>
</tr>
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<td>Household composition</td>
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<td>LARC</td>
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<td>Length of residence (at DGV)</td>
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<td>LARC</td>
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<td>LVNH scheme</td>
<td>A14</td>
<td>LARC</td>
</tr>
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<td>Length of residence in current property</td>
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<td>KPS 2000</td>
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<td>Type of accommodation</td>
<td>A16</td>
<td>PSE 1999/LARC</td>
</tr>
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<td>Tenure</td>
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<td>LARC</td>
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<td><strong>Work and employment</strong></td>
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<td>Activity in last 7 days</td>
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<td>Reasons for retiring</td>
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<td>LARC</td>
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<tr>
<td>Details of previous employment</td>
<td>B3–B8</td>
<td>HSE 2000</td>
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<td>Details of main occupation (social class)</td>
<td>B9–B10</td>
<td>NS-SEC</td>
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<td>Details of partner's main occupation (social class)</td>
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<td>Social class (subjective social class)</td>
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<td>BSA</td>
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<td><strong>Living in Denham Garden Village</strong></td>
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<td>Previous location</td>
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<td>LARC</td>
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<td>Previous accommodation type</td>
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<td>Previous number of bedrooms</td>
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<td>Length of residence in previous home</td>
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<td>Evaluation of previous accommodation</td>
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<td>Reasons for leaving previous home</td>
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<td>Deciding to move to DGV</td>
<td>C8–C11</td>
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<td>Perceptions of current accommodation</td>
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<td>HOOP/LARC</td>
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<td>Change to accommodation</td>
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<td>Accommodation score</td>
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<td>Car use and access</td>
<td>C17–C18</td>
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<td>Transport</td>
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<td>Use and evaluation of facilities at DGV</td>
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<td>Personal impact of moving to DGV</td>
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<td>Overall evaluation of DGV</td>
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**Physical health, mental health, well-being**

- Limiting longstanding illness: D1–D4, Census 2001
- Eyesight and hearing: D5–D6, Health Assessment Questionnaire 2007
- Subjective health status: D7, SF12 version 2
- Physical and mental health status: D8-D13, SF12 version 2
- Rating of general health: D14, SF36
- Keeping healthy: D15, LARC
- Depression scale: D16, CES-D 10
- Location of GP practice: D17-D18, LARC
- Access to GP practice: D19, LARC
- Consultation with GP: D20, KPS
- Satisfaction with life: D21, SWLS
- Attend religious meetings: D22, PANT
- Religiosity: D23, LARC
- Quality of life: D24, CASP-19
- Global quality of life: D25, KPS

**Social and civic activities**

- Participation in organized activities: E1–E3, LARC
- Feeling unable to participate: E4, LARC
- Moving outside DGV: E5, LARC
- Participation in community groups etc: E6, PANT
- Participation in civic and community activities: E7–E8, PSE 1999/KPS
- Awareness of current events: E9, LARC
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<td>Evaluation of help received from DGV staff</td>
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<td>KPS</td>
</tr>
</tbody>
</table>

**Abbreviations**
- Berryhill – New Lifestyles in Old Age
- BSA – British Social Attitudes survey
- CASP-19 – Quality of Life measure
- CES-D 10 – Center for Epidemiologic Studies Short Depression Scale
- ELSA – English Longitudinal Study of Ageing
- HCQ – Based on Harmonised Concepts and Questions for Government Social Surveys
- HOOP – Housing Options for Older People
- HSE – Health Survey for England
- KPS – Keele Poverty Survey
- NALS – National Adult Learning Survey
- NCI – Neighbourhood Cohesion Instrument (Buckner)
- NS-SEC – National Statistics Socio-economic Classification
- PANT – Practitioner Assessment of Network Type (Wenger)
- PSE – Millennium Survey of Poverty and Social Exclusion
- SF12 – Health measure
- SF36 – Health measure
- SWLS – Satisfaction With Life Scale (Diener)
Appendix 2

Letter to wave 1 respondents

27th March 2009

Dear

Thank you again for helping us with our first survey at Denham in 2007. We had a fantastic response from residents in the village, with 70% of all residents taking part!

Our next survey begins later this spring and we very much hope that you, in particular, will be willing to take part again. It is especially important that those people who took part last time also participate this time. If everyone who took part in 2007 takes part again, we will be able to measure changes in, for example, people’s health status, their use of facilities, and the types of activities they do.

We would also like to invite you to an event in the village hall at 10.30am on Tuesday 19th May 2009 where we hope to present some of our findings from the first phase of the study. Refreshments will be provided and the event will end with lunch at 12.30pm.

We hope you will take part in the survey again this year and enclose some advance information about it.

Best wishes,

on behalf of the LARC research team:

Dr Bernadette Bartlam
Professor Mim Bernard
Abi Bryan
Jenny Liddle
Professor Tom Scharf
Professor Julius Sim

The LARC research team
Centre for Social Gerontology, Research Institute for Life Course Studies
Keele University, Staffordshire, ST5 5BG
Tel: 01782 733844 Email: larc@ilcs.keele.ac.uk Web: www.keele.ac.uk/larc
Appendix 3

Letter to residents living in the village but not interviewed at wave 1

27th March 2009

Dear

You may already be aware that we are conducting a study about the experience of living in Denham Garden Village. Every other year we invite all residents to take part in a survey.

Our next survey begins later this spring and we very much hope that you will be willing to take part. A large number of residents took part in our first survey in 2007. However, we are particularly keen for residents who did not do the survey last time to take part this time in order to give us a more complete picture of life at Denham.

We would also like to invite you to an event in the village hall at 10.30am on Tuesday 19th May 2009 where we hope to present some of our findings from the first phase of the study. Refreshments will be provided and the event will end with lunch at 12.30pm.

We hope you will take part in the survey this year and enclose some advance information about it.

Best wishes,

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The LARC research team
Centre for Social Gerontology, Research Institute for Life Course Studies
Keele University, Staffordshire, ST5 5BG
Tel: 01782 733844   Email: larc@ilcs.keele.ac.uk   Web: www.keele.ac.uk/larc
Appendix 4

Letter to new residents – moved in since wave 1 survey

27th March 2009

Dear

You may already be aware that we are conducting a study about the experience of living in Denham Garden Village. Every other year we invite all residents to take part in a survey.

Our next survey begins later this spring and we very much hope that you will be willing to take part. We had a fantastic response from residents in the village for our last survey in 2007, with 70% of all residents taking part! However, we are particularly keen for residents who have moved in to the village since May 2007 to participate this time, even if they have only moved in recently. This will give us a more complete picture of life at Denham.

We would also like to invite you to an event in the village hall at 10.30am on Tuesday 19th May 2009 where we hope to present some of our findings from the first phase of the study. Refreshments will be provided and the event will end with lunch at 12.30pm.

We hope you will take part in the survey this year and enclose some advance information about it.

Best wishes,

on behalf of the LARC research team:

Dr Bernadette Bartlam
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Appendix 5

Survey information sheet

Introduction

You may already be aware that researchers from Keele University are conducting a study about the experience of living in Denham Garden Village. The study gives residents an opportunity to talk about different aspects of life in Denham Garden Village, including the things they like and the things they like less.

As part of the study, all residents are invited to take part in a survey every other year. We have talked about this at Residents’ Forum meetings and at meetings with staff at Denham Garden Village. A large number of residents took part in our first survey in 2007 and we would like to build on this success.

Our next survey begins later this spring and we very much hope that you will be willing to take part. By answering our questions you will be helping us to improve our knowledge of what is it like to live in Denham Garden Village.

How have I been chosen to take part?

We are contacting all residents living in Denham Garden Village to invite them to take part in this survey.

What will I have to do if I take part?

If you agree to take part, a member of the research team will contact you to arrange to do the survey with you at a time that is convenient for you. This typically takes around one hour to complete. You can choose do this in your home or in another location in the village.

The answers you give to our questions will be treated in the strictest confidence. Absolutely no-one outside the research team will have access to the information you provide, and the study’s findings will be presented in such a way that no individuals will be identifiable.
Do I have to take part?

No. As in the previous survey in 2007, taking part is entirely voluntary. If you would prefer not to take part, you do not have to give a reason. If you decide to take part but later change your mind, you will be able to withdraw from the study at any time.

Are there other ways to take part in the study?

Yes, there are! As well as surveys, we are also encouraging residents to take part in other ways. This might involve you attending a group discussion or writing about your experiences.

Some residents take part in all aspects of the study, and others are involved in one or two elements. It’s up to you how involved you wish to be. Please get in touch with us if you would like to know more about taking part in the study.

What do I do now?

We will contact you to find out if you wish to take part in the survey. If you agree to take part, we will arrange for a member of the research team to visit you at a convenient time to do the survey with you.

If you would like to know anything more about the study, please do not hesitate to contact our Administrator, Abi Bryan. Abi’s contact details are given below. Please discuss this information with your family or friends if you wish.

We do hope that you will be able to take part in this study. By taking part you will be helping to improve our knowledge of residents’ experiences of living at Denham Garden Village.

Contact us

| The LARC research team | Telephone: +44 (0)1782 733844 |
| Centre for Social Gerontology | Email: larc@ilcs.keele.ac.uk |
| Research Institute for Life Course Studies | Web: www.keele.ac.uk/larc |
| Keele University | |
| Staffordshire | |
| ST5 5BG | |
Appendix 6

Guidelines on telephone recruitment conversation

**Introduce yourself**
Hello, is that Mr/Mrs .......?
Hello Mr/Mrs....
My name is ........ I work at Keele University.
You may know that we are carrying out some research in the Village looking at the experiences of people who live there - what sorts of things they like about the village and what sorts of things they think don’t work so well.

I’m checking – have you heard about our work?

**If yes:**
Great, so what we’re doing at the moment is interviewing as many residents as possible, because obviously residents are the only people who actually know what it’s like.
I’m phoning you to see if you would be willing to talk with us.
I do emphasize that it will be in complete confidence. That any information you give us will be taken back to the University and that nobody in the village will know who has said what.
What we will do is produce anonymous reports for Anchor which say a number of people said this, some people said that.

The questions are around your reasons for moving to the village, your health generally and your experience of living in a retirement community. This will take no more than an hour.

Does that make sense? Would you be happy to make an appointment for one of us to come and see you?

**If no:**
Ok, if I can explain. I’m a member of the Centre for Social Gerontology at Keele University. We are in the middle of a 3 year project looking at the experiences of residents who live in Denham Garden Village.
Developments like Denham are fairly new in the UK, and we are trying to understand their strengths and also their limitations, because clearly they will suit some people very well, and other people not so well.

So what we’re doing at the moment is interviewing as many residents as possible, because obviously residents are the only people who actually know what it’s like. I’m phoning you to see if you would be willing to talk with us.
I do emphasize that it will be in complete confidence. That any information you give us will be taken back to the University and that nobody in the village will know who has said what.
What we will do is produce anonymous reports for Anchor which say a number of people said this, some people said that.

The questions are around your reasons for moving to the village, your health generally and your experience of living in a retirement community. This will take no more than an hour.

Does that make sense? Would you be happy to make an appointment for one of us to come and see you?
Thank you

Thank you very much (make appointment – explain which member of the team will be coming and that they will be carrying an identity card)

Finally, I just want to say that when (member of team) arrives, if you have changed your mind then, or at any time during the interview, please don’t hesitate to say so.

Just to say again, that my name is …. And my phone number is ........
Don’t hesitate to come back to me/call me if you have any queries.

Thank you very much for your time, and take care.
Appendix 7

Consent form

CONSENT FORM

Please sign this form to give us your permission to use the information you give us in this survey.

1. I have read and understand the survey information leaflet.

2. I have had the opportunity to ask questions.

3. I understand that my participation is voluntary and that I am free to refuse to answer a question, or withdraw from the survey at any time, without giving any reason.

4. I understand that the results of the survey may be included in reports or publications from this study, but that these will be anonymous and I will not be identifiable.

5. I agree to take part in the survey.

___________________       __________________              _________
Signature       Print name                    Date

Any questions, please contact our Administrator, Abi Bryan, using the details below.

Contact us

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Staffordshire
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