

KŌTĀTĀ

INSIGHT

BEHAVIOURAL ECONOMIC & SOCIAL ANALYSIS

Scoping paper

Initial specifications for a short form wellbeing outcomes survey

April 2019¹

¹ This paper has been slightly revised for publication in April 2020

This paper was written by Bev Hong with expert input by Conal Smith of Kōtātā Insight on commission to the Social Investment Agency.

This working paper was completed as a preliminary desk-based exercise in 2019. It was undertaken as the basis for consultation and possible development of a short form wellbeing survey for small organisations.

It is being published in 2020 as some have found it a useful source of questions for data collection relating to Covid-19.

Minor editing has been undertaken in preparing this paper for publication. A more substantive revision has been the inclusion of the 5-item WHO-5 mental wellbeing measure as part of the initial core survey specifications to reflect heightened overall interest in monitoring mental health.

CONTENTS

Summary	1
Introduction	3
Purpose	3
Wellbeing as a focus for public policy.....	3
The value of a short form wellbeing survey	4
Survey Content.....	5
High consistency in the wellbeing topic areas of national wellbeing frameworks.....	5
Adoption of 12 short form topic areas	7
Survey structure and questions	9
Key survey features.....	9
The General Social Survey as an initial guide	13
Initial core short form survey questions.....	15
Data, analysis and reporting and next steps	18
Data specifications, analysis and reporting needs.....	18
Next steps	18
References.....	20
Appendix A Initial short form survey questions.....	21
Appendix B The SF-12 and Material Wellbeing Index questions	26

List of tables

Table 1 Topic areas and focus of questions identified for a short form wellbeing survey	2
Table 2 Topic areas for OECD How's Life and New Zealand wellbeing reporting frameworks.....	5
Table 3 Local government wellbeing and short form survey topic areas	7
Table 4 The 12 current wellbeing domains of the Living Standards Framework.....	8
Table 5 Key survey features and short form survey considerations	10
Table 6 Primary two-yearly repeated content of NZGSS (2016, 2018 surveys).....	14
Table 7 Proposed short form wellbeing focus of survey questions	16

SUMMARY

This scoping paper presents initial specifications for the development of a short form wellbeing outcomes survey that small local government and service provider organisations can use for targeted data collection about wellbeing. The benefit of such a survey is that it will provide a robust, valid and user-friendly approach for collecting wellbeing data that would not otherwise be available and which has comparability with wellbeing outcomes reporting in New Zealand at a national level.

A comparison of the OECD international and New Zealand national wellbeing reporting frameworks identified substantial comparability in the topic areas or domains of wellbeing that are used. Given the pivotal role that the Treasury Living Standards Framework (LSF) and associated dashboard has for government fiscal and policy decision making – the 12 LSF current wellbeing domains have been adopted as the basis for structuring the survey content for the initial survey specifications.

The New Zealand General Social Survey (NZGSS) provides the initial guide for the development of the specifications as it is the primary data source that national reporting frameworks use for reporting on the wellbeing of New Zealanders. This survey is conducted by StatsNZ and has been undertaken biennially since 2008 with refinements over time. Adopting the structure, question order, framing and response format of the NZGSS both makes use of the best practice approach reflected by StatsNZ as well as helps to ensure alignment and comparability of the data collected by the short form survey.

The topic areas and 31 questions initially identified for inclusion in a short form survey are presented on the next page. These were identified based on the following criteria:

- brevity: a minimal number of questions to reflect the topic area
- respondent burden: ease of understanding and response
- face validity: that reflects the topic area focus
- statistical validity: demonstrated use and ability to represent the underlying concept
- monitoring change: potential as wellbeing outcome measure with relevance for monitoring change over time
- alignment: indicators commonly used in national wellbeing frameworks
- availability: information not available elsewhere (such as through administrative datasets, IDI or geographic-based information).

The next steps for this work would be to:

1. identify and engage with interested parties
2. consult on the initial specifications and confirm a common set of information needs and survey approach/es for the local context
3. build the survey instrument/s
4. pilot the short form survey format/s.

An essential element to accompany the building of the short form wellbeing survey will be the development of data specifications as a key output. This will ensure that there is a consistent approach across organisations that use the survey to data storage. This consistency would facilitate the use of data across comparable datasets.

Table 1 Topic areas and focus of questions identified for a short form wellbeing survey

Topic area	Questions
Subjective wellbeing	Life satisfaction - how you feel about your life as a whole Family wellbeing - how your family is doing
Health	General health self-rating Mental wellbeing (WHO-5 scale)
Cultural identity	Able to be yourself in New Zealand
Civic engagement and governance	Trust in most people in New Zealand Trust in institutions: Police, Educational, Media Discrimination (treated unfairly) in past 12 months
Income and consumption	In the past 12 months – not paid electricity, gas, rates, or water bills on time, because of a shortage of money How well total income meets every day needs and necessities
Environment	For development – initial suggestions: <ul style="list-style-type: none"> • How satisfied are you with the quality of your local environment? • Satisfaction with access to natural spaces such as waterfronts, parks, and green spaces
Housing	House cold in winter Is the house damp Does the house get mould Crowding: How many bedrooms (relative to children and adults)
Safety	How safe you feel walking alone in your neighbourhood after dark
Social Connection	Feelings of loneliness How hard to talk to someone if depressed How hard to ask someone for a place to stay - to stay with them
Time use	For development – initial suggestions: <ul style="list-style-type: none"> • Satisfaction with free time • Satisfaction with time available to do the things they want to do
Jobs and earnings	If in paid employment - satisfaction with their paid employment over the past 4 weeks (asked about in demographics section) For potential development – initial suggestions: <ul style="list-style-type: none"> • Level of stress experienced from their paid employment
Knowledge and skills	Highest educational qualification – school (NCEA level), post school
Demographics	For discussion Date of Birth (DOB), ethnicity, sexual orientation, birth country, year and monthly arrived in New Zealand, birthplace of parents, Māori descent, qualifications, paid work, jobs, hours of work, income

INTRODUCTION

Purpose

This scoping paper presents initial specifications for the development of a short form wellbeing outcomes survey that local government and service provider organisations can use for targeted data collection about wellbeing. The benefit of such a survey is that it provides a robust, valid and user-friendly approach for data collection which has comparability with other wellbeing outcomes data and reporting in New Zealand.

Wellbeing as a focus for public policy

Over recent years, there has been increased international focus on the use of wellbeing as a key concept for governments to better understand how people are faring, what works to improve outcomes for people, and why. A wellbeing approach that includes a focus on the experiences of people and communities as well as environmental and economic considerations has been adopted by the New Zealand government as a way to broaden the frame of reference for budgetary and policy decision-making and to measure the country's progress.

The New Zealand Treasury's Living Standards Framework (LSF) and its associated dashboard underpin this wellbeing approach. The framework helps to:

advise successive governments about the likely effects of their policy choices on New Zealanders' living standards over time. By adopting the LSF, we are aligning our stewardship of the public finance system with an intergenerational wellbeing approach².

The inclusion of wellbeing as a primary focus for public policy has been consolidated through the announcement of the New Zealand Wellbeing Budget 2019. There has also been consultation by the New Zealand Treasury on a proposal to embed wellbeing in the Public Finance Act 1989. (The Treasury, 2018) This proposal aims to include wellbeing objectives as the basis for guiding budget decisions and the requirement to report on wellbeing indicators, alongside macroeconomic and fiscal indicators.

At a local level, the Local Government (Community Well-being) Amendment Bill, currently being progressed through parliament, restores the stated purpose of local government to *promote the social, economic, environmental, and cultural well-being of communities*. This amendment reinstates the wellbeing focus introduced in the Local Government Act 2002, and which was subsequently removed in the 2012 Amendment Act.³

The adoption of a wellbeing focus as central to public policy requires robust and relevant evidence about the wellbeing of New Zealanders to support decision-making. This includes the ability to meaningfully measure, understand and report on wellbeing outcomes and how they change over time both nationally and locally.

² Retrieved April 2018, <https://treasury.govt.nz/information-and-services/nz-economy/living-standards>

³ Retrieved April 2019, https://www.parliament.nz/en/pb/bills-and-laws/bills-proposed-laws/document/BILL_77941/local-government-community-well-being-amendment-bill#

The value of a short form wellbeing survey

StatsNZ (Statistics New Zealand) is New Zealand's official statistics agency and conducts national surveys to describe and better understand the economy, population and society of New Zealand. The New Zealand General Social Survey (NZGSS), conducted by Statistics New Zealand biennially, collects data about the wellbeing of New Zealanders nationally. It involves a survey of about 8000 individuals aged 15 years and over who are living in New Zealand households (StatsNZ, 2018).

The NZGSS is the primary data source for the reporting of wellbeing indicators nationally and for key subgroups in the New Zealand population. However, due to sample limitations, the NZGSS is not able to meet the wellbeing data needs of smaller local government organisations or the small subgroup populations associated with social service client groups. Wellbeing data will need to be collected by local government or social service agencies themselves to support evaluation research and decision-making for them to be able to monitor and report on the wellbeing of their constituents or client base.

It is proposed that a short form wellbeing survey will provide a coordinated and consistent approach to robust wellbeing data collection that is aligned and comparable with national data collection approaches. This will be of value to those organisations that may lack expertise in data collection as it will result in higher quality data being collected. In addition, the use of a common short form survey will mean that the same wellbeing data is collected using a consistent approach which will result in comparable datasets. This will allow user agencies to compare wellbeing outcomes with each other and with national data from the NZGSS and provides opportunities for research and analysis involving more than one dataset.

Common wellbeing data collection at a local level that is robust, systematic and aligns with national level activities will also assist to embed and create a coherent measurement system connected locally and nationally.

SURVEY CONTENT

High consistency in the wellbeing topic areas of national wellbeing frameworks

Topic area specifications for the short form survey content have been identified by considering the range of topic areas covered in the OECD *How's Life* Wellbeing Framework and national New Zealand wellbeing reporting frameworks. Overall, there is a high consistency in the range of topics that these wellbeing frameworks use. The frameworks considered are:

- The OECD *How's Life* Wellbeing Framework
- The Treasury Living Standards Framework (LSF)
- The Social Report
- The Social Investment Agency wellbeing measurement approach
- Indicators Aotearoa New Zealand.

A brief description of each of these reporting frameworks is presented below.

Table 2 Topic areas for OECD *How's Life* and New Zealand wellbeing reporting frameworks

The OECD <i>How's Life</i> Wellbeing Framework (OECD, 2011)
<p>The OECD <i>How's Life</i> Wellbeing Framework covers 11 domains of wellbeing and is used to measure and compare how people are faring across countries internationally. It substantially informed the development of the Treasury LSF as well as the SIA wellbeing measurement approach.</p> <p>Topic/domain areas: Civic engagement and governance, Education and skills, Environmental quality, Health status, Housing, Income and wealth, Jobs and earnings, Personal security, Social connections, Subjective wellbeing, Work and life balance</p>
The Treasury Living Standards Framework (The Treasury, 2018)
<p>The Treasury Living Standards Framework has been developed to reflect what matters to New Zealand and support the inclusion of wellbeing considerations in public policy decision making. The LSF has 12 current wellbeing outcome domains which form the basis for reporting on the current wellbeing of people aged 15 years and over in New Zealand (Our People) and to monitor progress that is being made at a national level (Our Country).</p> <p>Topic/domain areas: Civic engagement and governance, Cultural identity, Environment, Health, Housing, Income and consumption, Knowledge and skills, Safety, Social connections, Subjective wellbeing, Time use, Jobs and earnings.</p>

The Social Report (Ministry of Social Development, 2016)

The Social Report was first published in 2001 with the most recent report published in 2016. It presents indicators grouped according to 10 outcome domains to show how people are faring in New Zealand and monitor trends over time. It aims to:

- report on social indicators that complement existing economic and environmental indicators
- compare New Zealand with other countries on measures of wellbeing
- contribute to better-informed public debate
- aid planning and decision-making and help identify key areas for action.

Topic/domain areas: Civic and political rights, Cultural Identity, Economic standard of living, Health, Knowledge and skills, Leisure and recreation, Life satisfaction, Paid work, Safety, Social Connectedness.

The Social Investment Agency wellbeing measurement approach

(Social Investment Agency, 2018)

The SIA wellbeing measurement approach is based on the OECD *How's Life Wellbeing Framework* and is consistent with the Treasury's LSF. The approach focuses on identifying changes in wellbeing for people who receive social sector interventions. The model has 12 topic domains with Life Satisfaction identified separately as an overall measure of how people view their own wellbeing.

Topic/domain areas: Civic engagement and governance, Environmental quality, Health, Housing, Income and living standards, Jobs and earnings, Knowledge and skills, Leisure and free time, Safety, Self, Social connections, Ūkaipōtanga / Cultural identity.

Indicators Aotearoa New Zealand - Ngā Tūtohu Aotearoa (StatsNZ, 2019)

Indicators Aotearoa New Zealand has been developed by Stats NZ as a source of measures for New Zealand's wellbeing. The development of these indicators has been a staged process that has involved broad public engagement and consultation to identify what is important to New Zealanders, input by data experts and formal peer review (both national and international).

Eighteen topic areas and their related indicators have recently been finalised with first reporting to begin in June 2019. The reporting focus includes measures of current wellbeing, capital stocks, and trans-boundary impacts. Stats NZ has worked with Treasury to ensure Indicators Aotearoa New Zealand broadly aligns with Treasury's Living Standards Framework.

StatsNZ note that the initial set of indicators includes gaps in data, ranging from a complete absence of data to limitations on the ability to break information down to useful and meaningful levels for different communities.

Topic/domain areas: Air quality, Cities and settlements, Climate, Culture, Economic standards of living, Ecosystems, Governance, Health, Identity, Knowledge and skills, Land, Leisure, Safety, Social connections, Subjective wellbeing, Waste, Water and sanitation, Work.

The Social Investment Agency (SIA) working paper that proposes the SIA wellbeing measurement approach (SIA, 2018a) presents a mapping and comparison of the topic areas and conceptual topic definitions of the Treasury Living Standards Framework (LSF), the OECD *How's Life* Wellbeing Framework, the Social Report and the SIA wellbeing measurement approach. This found very high consistency across the topic or domain areas and similarity in the concepts used with minor variation in content and emphasis. New Zealand national approaches, however, all include reference to cultural identity as a topic area whereas the OECD wellbeing framework does not.

At the time of the mapping exercise described above, the Indicators Aotearoa New Zealand topic areas and suite of indicators were yet to be decided. Since that time, 18 topic areas have been confirmed.

Mapping across the 18 Indicators Aotearoa New Zealand topic areas to the OECD and national frameworks referred to above show that whilst the topic areas similarly reflect those identified in the other frameworks, they include significantly more detail with respect to environmental concerns and the built environment.

Adoption of 12 short form topic areas

For the purposes of the initial specifications for a short form wellbeing survey, it is proposed that the 12 topic areas found to be common across the national wellbeing frameworks in the comparison exercise described above are used. These 12 topic areas can also be mapped against the social, economic, environmental, and cultural well-being areas that local governments will be required to focus on in the future as described in the Local Government (Community Well-being) Amendment Bill currently being considered by Parliament (see below).

Table 3 Local government wellbeing and short form survey topic areas

Local government wellbeing areas	Short form survey topic areas
Social	Social connection Knowledge and skills Health Safety Time use Subjective wellbeing
Economic	Income and consumption Jobs and earning Housing
Environmental	Environment
Cultural	Cultural identity Civic engagement and governance

Given the pivotal government role of the Treasury LSF and the alignment of ongoing national indicator activities to this framework – it is proposed that the 12 LSF current wellbeing domains and descriptions are used for developing the short form survey as a starting point. These 12 domains are described below.

Table 4 The 12 current wellbeing domains of the Living Standards Framework

Domain	Definition
Civic engagement and governance	People's engagement in the governance of their country, how “good” New Zealand's governance is perceived to be and the procedural fairness of our society.
Cultural identity	Having a strong sense of identity, belonging and ability to be oneself, and the existence value of cultural taonga.
Environment	The natural and physical environment and how it impacts people today.
Health	Our mental and physical health.
Housing	The quality, suitability and affordability of the homes we live in.
Knowledge and skills	People's knowledge and skills.
Income and consumption	People's disposable income from all sources, how much people spend and the material possessions they have.
Jobs and earnings	The quality of people's jobs (including monetary compensation) and work environment, people's ease and inclusiveness of finding suitable employment and their job stability and freedom from unemployment.
Safety	People's safety and security (both real and perceived) and their freedom from risk of harm, and lack of fear.
Social connection	Having positive social contacts and a support network.
Subjective wellbeing	Overall life satisfaction and sense of meaning and self.
Time use	The quality and quantity of people's leisure and recreation time (that is, people's free time when they are not working or doing chores).

SURVEY STRUCTURE AND QUESTIONS

Initial specifications for the way that the survey is structured, the questions and how they are framed are addressed in this section. The OECD *Guidelines on Measuring Subjective Wellbeing* (OECD, 2013) along with StatsNZ NZGSS descriptive information (StatsNZ, 2016 & 2018) have been used to guide the development of these specifications.

The proposed initial specifications take into account the need for a survey to collect wellbeing data that:

- is technically robust and credible
- prioritises information needs across the 12 wellbeing domains not available from other data sources (such as administrative datasets or geographic-based information)
- is short and user friendly
- can be administered in a way that is amenable to the context of local organisations and service providers
- enables on-going monitoring of progress and changes over time
- aligns with and is comparable to the LSF outcomes reported at a national level
- allows opportunity for analysis across datasets where similar data has been collected (combined or pooled data) or by linking to different datasets (for example matching individuals across datasets).

Key survey features

The development of survey methodology including a questionnaire requires specialist expertise. There are many methodological features that need to be taken into account to ensure that data collection is systematic, robust and that the data that is collected relates to what is intended (that is – that questions and response options have been interpreted as expected by respondents). In addition, specifications for a short form wellbeing survey also need to align with the approaches taken in other wellbeing data collection approaches if comparability across datasets is to be maximised.

Although a range of potential wellbeing indicators and data sources are identified in the SIA wellbeing measurement approach working paper (Social Investment Agency, 2018a), the NZGSS provides a common key source for wellbeing reporting across New Zealand's national frameworks. This includes the use of NZGSS data as the main data source for reporting the current wellbeing of New Zealanders by the Treasury (McLeod, 2018). The common use of data from the NZGSS points to adopting an approach which aligns closely with it to maximise comparability with LSF reporting. This approach also means that there is an ability to 'benchmark' short form survey results against responses to a nationally representative NZGSS sample.

Table 5 presents key survey features, potential methodological issues, the approach used in the NZGSS and considerations for an initial short form approach. These features include the way in which the survey is conducted (Modality), when (Seasonality), for whom (Sample size), survey content and questionnaire development.

Table 5 Key survey features and short form survey considerations

Feature	Issues	General Social Survey	Short form approach considerations
<p>The context for the survey – response bias and a tendency to respond in a way which is viewed favourably.</p>	<p>The context under which a person participates in a survey may influence how they interpret questions and their responses.</p> <p>This potential response bias may include an increased tendency to respond in a way which is considered desirable or so that they are viewed favourably.</p>	<p>Survey conducted as part of a national survey by an independent StatsNZ interviewer.</p>	<p>The service provider context may have an impact on response bias. Potential impacts include an:</p> <ul style="list-style-type: none"> • increased emphasis on aspects relating to the services being provided when interpreting some questions • increased tendency for a participant to respond in the way that they consider is desired (for example that wellbeing has improved over time). • decreased tendency towards responding favourably due to being in a context where there is an acknowledged need for support (the services being provided). <p>A further aspect that may influence individual’s responses is if the interviewer who conducts the survey has a provider relationship with the respondent (for example case worker).</p>
<p>Modality – the way the survey is conducted</p>	<p>Different survey methods: for example, face to face, telephone, and self-completion on-line result in different responses.</p>	<p>Face to face with interviewer who uses a laptop.</p>	<p>Ideally, the survey would be conducted in the same way. However, practical considerations may mean that other methods are used (for example less costly).</p>
<p>Seasonality – the time of year the survey is conducted</p>	<p>Surveying at different times of the year - for example holidays, seasons or special commemorative events may result in different responses.</p>	<p>Interviews conducted over a 12-month period.</p>	<p>To evaluate the impact of a policy or service, data collection may need to take place at specific time periods before and after policy changes/service provision.</p> <p>Standard seasonal adjustments may be able to be derived from NZGSS data.</p>

Feature	Issues	General Social Survey	Approach considerations
<p>Sample frame and size – identification of the group of potential respondents and how many are invited and how many participate</p>	<p>The ability to identify people in the target group, with available information to select, contact and survey a representative sample.</p> <p>Sample size that enables analysis and representative reporting</p>	<p>Statistical procedures used to select households from across New Zealand.</p> <p>Sample of 8000 individuals aged 15 years and over living in residential households.</p>	<p>The electoral roll for local area-based surveying and the client database for service providers as sample frames.</p> <p>An important consideration for any sample frame is how well it reflects the population of interest. For example, the profile of young voters on the electoral roll is different from that of young people in the general population. There are sampling and statistical techniques that can be used to lessen concerns about the representativeness of a sample frame (sampling bias).</p> <p>Sample size will depend on the types of analyses and reporting the data will be used for. Ideally service providers could incorporate the survey as part of their on-going monitoring/assessment approach such that the survey was conducted across all clients.</p>
<p>Survey content – the areas of interest that the questionnaire will ask about</p>	<p>Ensuring that the survey completion time is short while gathering sufficient data to meet the information needs</p>	<p>Includes a wellbeing focus for reporting on 9 of the 12 LSF current wellbeing outcome domains.</p> <p>The primary NZGSS content (repeated biennially and which includes the wellbeing questions of interest) is allocated about 25 minutes to complete.</p>	<p>Users will have varied interest across the 12 LSF current wellbeing domains with some areas likely to be more strongly shared as a focus (for example, health potentially).</p> <p>Ensuring that the survey length is short whilst covering:</p> <ul style="list-style-type: none"> • the LSF current wellbeing outcome domains • demographic information that is not otherwise available (for example from service administrative data) for reporting and data matching to combine with other datasets for analysis. • The short form survey will be deliberately designed so that additional content can be added to it to reflect local concerns and priorities

Feature	Issues	General Social Survey	Approach considerations
<p>Survey questions – how questions are stated and the responses options that are provided</p>	<p>Question wording and the response options presented have an effect on the way they are answered.</p> <p>Questions and response options need to be presented in a way which is readily understood by respondents and not unduly complicated (respondent burden).</p>	<p>Question wording that has been refined over time and use of rating scales and show cards to assist with responding.</p> <p>Numeric from - 0 up to 10 - rating scales with descriptive labels at each end (the anchors), or 5-point labelled scales are generally used.</p>	<p>In general, wording of questions and response formats as used for the NZGSS is proposed.</p> <p>Some minimal adaptation to question wording may be required as only a subset of NZGSS questions are being asked about and to accommodate for context differences including the use of different survey methods (such as online completion or telephone surveys).</p> <p>Response options proposed to remain the same as for the NZGSS as they accord with international practice for the types of questions asked.</p>
<p>Introductory wording for areas of interest and survey question order</p>	<p>The way survey content is introduced can influence responses as can the order of questions.</p> <p>It is recommended that subjective wellbeing-related questions are asked about first, and factual questions are asked about later in the questionnaire.</p>	<p>Life satisfaction is the first question with subsequent questions introduced and grouped according to different wellbeing topic areas.</p> <p>Supplementary questions (not repeated biennially) are interspersed through the questionnaire.</p>	<p>It will be important to order the questions for the short form survey to align with when those topic areas are asked about in the NZGSS.</p> <p>Some NZGSS questions that are not included in the short form survey could influence responses. It is expected that as most questions included in the short form are asked early on in the NZGSS for that topic area, this will help minimise any question order effect.</p> <p>However, for the topic area - safety and security, respondents are asked about how worried they are about certain crimes such as being assaulted prior to questions about how safe they feel in different situations (such as using public transport at night). These earlier questions could potentially influence individual's responses to the latter questions about how safe they feel.</p>

The General Social Survey as an initial guide

Mirroring as much as possible the approach of one specific survey (in this case, the NZGSS), rather than adopting content and questions from many surveys has substantial advantages for addressing issues related to survey development such as the influence of order effects (responses to earlier survey questions effecting the response to later questions). The NZGSS was first conducted in 2008 and has been refined over time and reflects the OECD best practice advice for the measurement of wellbeing. Alignment with the LSF current wellbeing measures and the way the NZGSS is undertaken have therefore been primary factors for these suggested specifications.

Table 5 above has identified key survey features of the NZGSS and considerations for a short form survey used across local contexts. At a local organisational level, a range of factors are likely to influence the decisions made about how wellbeing data could best be collected. This includes aspects such as the characteristics of the survey target population, alignment with data collection through other surveying undertaken by the organisation, evaluative analysis needs and timing or resourcing implications.

These initial short form specifications propose a starting point for consultation to decide upon and build a core survey approach that can be used in common across organisations. This core approach could be:

- conducted as a standalone survey or included as the first section of a longer survey
- used by social service providers as part of initial information gathering with new clients and possibly repeated periodically over the time of service provision
- part of a routinely repeated survey of the population of interest (for example –adult population living in a small local authority area)
- conducted by face-to-face, telephone, hard copy, online self-completion or potentially face to face/phone *assisted* online or hard copy self-completion methods
- potentially administered by a client’s service provider.

The final core approach/es developed will depend on the outcome of consultation about these initial specifications with potential users. This would include consultation about practical considerations and information needs to be met by the survey. An essential aspect of developing the subsequent short form approach will be building and piloting the survey method in a way which includes testing for comparability with other data collection approaches (such as the NZGSS, or other modalities – such as face-to-face compared with self-completion).

Survey content order

The NZGSS includes primary content questions asked in every two-yearly survey and supplementary question areas asked about less frequently on a longer-term rotating basis. The primary content areas asked about in recent NZGSS surveys (2016, 2018) are listed in Table 6. As noted in the section above, question order influences the responses that individuals provide. Table 6 is presented in the order these question areas are asked about in the 2018 NZGSS questionnaire. The initial specification for a short form survey adopts this ordering approach for topic areas. Questions relating to a specific topic area have been grouped together.

Table 6 Primary two-yearly repeated content of NZGSS (2016, 2018 surveys)

Section	Question areas included
Household questionnaire	Age, sex, ethnicity, paid work, jobs, hours of work, income, housing tenure
Overall Life Satisfaction	Satisfaction with Life
Sense of purpose / Life worthwhile	Perception of how worthwhile life is
Health	Personal health – overall and mental wellbeing
Disability	Activity limitations
Language	Language first learned, languages spoken in the household, ability to speak Māori, Māori language
Culture and identity	Ability to express identity
Generalised trust	Trust in others
Institutional trust	Trust in institutions
Voting	Voting in, and reasons for not voting in last general election
Material standard of living	Whether people have enough money to meet their basic needs
Housing	Condition and suitability
Safety and security	Experiences of crime perceptions of safety
Acceptance of diversity	Acceptance of ethnic, religious and other cultural differences
Discrimination	Experiences of discrimination
Family wellbeing	How well family is doing, number of people in family, groups included in family (eg parents/grandparents)
Social connectedness	Contact with family and friends, loneliness, access to social support
Demography	Date of Birth (DOB), ethnicity, sexual orientation, birth country, year and month arrived in New Zealand, birthplace of parents, Māori descent, qualifications, paid work, jobs, hours of work, income

Initial core short form survey questions

An initial core set of wellbeing survey questions have been identified based on the following criteria:

- brevity: a minimal number of questions to reflect the topic area
- respondent burden: ease of understanding and response
- face validity: that reflects the topic area focus
- statistical validity: demonstrated use and ability to represent the underlying concept
- monitoring change: potential as wellbeing outcome measure with relevance for monitoring change over time
- alignment: indicators commonly used in national wellbeing frameworks
- availability: information not available elsewhere (such as through administrative datasets, IDI or geographic-based information).

An initial set of 31 core questions are presented in Table 6 below. More detailed initial specifications relating to these questions is presented in Appendix A based on how they are currently framed in the surveys from which they were sourced. These core questions do not include specific questions about income or paid employment because this information is potentially available from other data sources. However, this could be included in the development of a full survey following consultation.

Questions in the topic areas of the Environment, Time use (work and leisure) and Jobs and earnings (work stress) have not been developed and used commonly in national surveys. Initial suggestions have been provided in these areas based on the indicators for development identified for future work by StatsNZ (Indicators Aotearoa New Zealand) and a question identified in the OECD guidelines. These are signalled in the table notes.

Key question areas considered but not included at this initial stage were:

- first language use, and Te Reo Māori language proficiency to reflect Cultural Identity which have been initially excluded for brevity purposes
- Sense of purpose and Locus of control (sense of self-agency) have been initially excluded as not sufficiently reflecting experienced wellbeing *outcomes*
- the 12 mental and physical health items of the SF12 (used in NZGSS 2016) excluded for brevity and because StatsNZ removed them from 2018 NZGSS onwards⁴
- the full 9-item Material Wellbeing Index excluded for brevity.

However, some of these items could be included in a survey as supplementary information collected to provide a greater range of information for specific organisations should they wish to do so. A list of the questions included in the Material Wellbeing Index and SF12 are provided in Appendix B.

The aim of this initial specification is to provide a starting point to consult with potential users and confirm a small core common set of questions that could be used by organisations to collect data on how New Zealanders in their subgroups of interest are faring across the 12 wellbeing outcome topic areas. As mentioned above, these core questions could then be supplemented by additional questions in areas of specific interest.

⁴ The SF12 was replaced by the World Health Organisation – Five (WHO-5) mental wellbeing scale for the 2018 NZGSS. Following this, StatsNZ considered returning to inclusion of the SF12 (which is used in the New Zealand Health Survey) but has subsequently continued to use the WHO-5 as an ongoing measure of mental wellbeing.

This approach would then create a common and coherent measurement tool that aligned representative data for a smaller local context with the national level wellbeing picture for New Zealanders. Additional more detailed questions in specific topic areas collected through additional questions in the same survey or through other means could provide information about more nuanced changes over time that were linked to the high-level core wellbeing short form survey data.

Table 7 Proposed short form wellbeing focus of survey questions

Topic area	Questions
Subjective wellbeing Q1-2	<p>Life satisfaction - how you feel about your life as a whole (Rating: <i>0 completely dissatisfied to 10 completely satisfied</i>)</p> <p>Family wellbeing - how your family is doing (Rating: <i>0 extremely badly to 10 extremely well.</i>)</p>
Health Q3-8	<p>General health self-rating (Rating: <i>poor to excellent</i>)</p> <p><u>WHO-5 mental wellbeing measure¹</u></p> <p>Frequency of the following over the last two weeks:</p> <ul style="list-style-type: none"> • I have felt cheerful and in good spirits • I have felt calm and relaxed • I have felt active and vigorous • I woke up feeling fresh and rested • My daily life has been filled with things that interest me <p>Response options: <i>all of the time (5), most of the time (4), more than half of the time (3), less than half of the time (2), some of the time (1), at no time (0)</i></p>
Cultural identity Q9	<p>Able to be yourself in New Zealand (Rating: <i>very easy to very hard</i>)</p>
Civic engagement and governance Q10-14	<p>Trust in most people (Rating: <i>0 not at all to 10 completely</i>)</p> <p>Trust in institutions: Police, Educational, Media (Rating: <i>0 not at all to 10 completely</i>)</p> <p>Discrimination (treated unfairly) in past 12 months (Yes, No, Don't know)</p>
Income and consumption Q15-16	<p><i>Income has not been included as a core question here as information is available elsewhere (IDI) or may be included in administrative data records. If needed it is asked about in the demographics section (see below).</i></p> <p>In past 12 months – not paid electricity, gas, rates, or water bills on time, because of a shortage of money (Rating: <i>not at all to more than once</i>)</p> <p>How well total income meets every day needs and necessities (Rating: <i>not enough to more than enough money</i>)</p>
Environment Q17-18	<p><i>Could potentially be inferred from geographical information</i></p> <p><i>For development – initial suggestions:</i></p> <ul style="list-style-type: none"> • How satisfied are you with the quality of your local environment?² • Satisfaction with access to natural spaces such as waterfronts, parks, and green spaces³

Topic area	Questions
Housing Q19-22	<p>House cold in winter (Rating: <i>N/A, no to yes, always</i>)</p> <p>Is the house damp (Rating: <i>not damp to yes, always</i>)</p> <p>Does house get mould (Rating <i>no, yes</i>)</p> <p>Crowding: How many bedrooms (relative to number of children and adults living in house)⁴</p>
Safety Q23	How safe you feel walking alone in your neighbourhood after dark (Rating: <i>very unsafe to very safe</i>)
Social Connection Q24-26	<p>Feelings of loneliness (Rating: <i>none of the time to all of the time</i>)</p> <p>How hard to talk to someone if depressed (Rating: <i>very easy to very hard</i>)</p> <p>How hard to ask someone for a place to stay - to stay with them (Rating from <i>very easy to very hard</i>)</p>
Time use Q27-28	<p><i>For development – initial suggestions:</i></p> <ul style="list-style-type: none"> • Satisfaction with free time • Satisfaction with the amount of time available for them to do the things they want to do³
Jobs and earnings Q29-30	<p>If in paid employment - satisfaction with their paid employment over the past 4 weeks (asked about in demographics section) (Rating from <i>very dissatisfied to very satisfied</i>)</p> <p><i>Employment and earnings could be gained from other sources (IDI) or asked about in demographics section (see below)</i></p> <p><i>For potential development – initial suggestions:</i></p> <ul style="list-style-type: none"> • Level of stress experienced from their paid employment³
Knowledge and skills Q31	Highest educational qualification – school (NCEA level), post school (Asked about in demographics section (see below) - if not already known.
Demographics	<p><i>For discussion as to relevance.</i></p> <p>Date of Birth (DOB), ethnicity, sexual orientation, birth country, year and month arrived in New Zealand, birthplace of parents, Māori descent, qualifications, paid work, jobs, hours of work, income⁵</p>

Note 1: The inclusion of the WHO-5 mental wellbeing measure has been made as part of the 2020 preparation of this paper for publication to reflect heightened overall interest in monitoring mental health.

Note 2: A question in the suite of domain evaluation questions in the Personal Wellbeing Index (OECD, 2013)

Note 3: Identified as indicators or areas of questions development in *Suite of Indicators Aotearoa New Zealand – Ngā Tūtohu Aotearoa indicators, for release in June 2019* StatsNZ, 2019

Note 4: Calculated, for example, using the Canadian Crowding Index. For a description see - <http://socialreport.msd.govt.nz/appendix-3-technical-notes.html>

Note 5: The NZGSS demographic-related questions have not been presented in this scoping paper. Core questions should include those needed for data matching such as DOB. Questions can be retrieved from <https://cdm20045.contentdm.oclc.org/digital/collection/p20045coll2/id/806/rec/6>

DATA, ANALYSIS AND REPORTING AND NEXT STEPS

Data specifications, analysis and reporting needs

An essential element to accompany the building of the short form wellbeing survey will be the development of data specifications as a key output. This will ensure that there is a consistent approach to data storage across organisations that use the survey. This consistency would facilitate the use of comparable data across these datasets.

Consistency in data specifications would also mean that a standardised approach to reporting and analysis could be developed for use by organisations. This could be of great value to small organisations with low or stretched expertise in this area and could be a tool that is commonly used across different organisations.

The common reporting and analysis needs across potential users can be identified as part of consultation undertaken on the basis of these initial specifications. Potential areas of common interest include:

- reporting the current wellbeing of their subgroup of interest across the 12 topic areas
- monitoring and reporting on changes over time
- comparison with national or larger regional subgroups to better appreciate their specific differences for planning purposes
- a hierarchy of wellbeing outcomes reporting which includes the higher-level short form survey as well as more detailed wellbeing related changes over time.

More specific analyses that the short form wellbeing survey data could potentially contribute to include evaluation related analyses (with a focus on long term outcomes), and cost-benefit related analyses that contribute to policy and fiscal decision-making.

Next steps

This scoping proposes specifications for an initial 31 items for a short form wellbeing outcomes survey. These initial specifications are based around the 12 LSF current wellbeing domains and the NZGSS. They are a useful starting point for developing a robust and useful survey instrument that can be consistently used by local government and social service organisations. The aim of the tool is to provide high level current wellbeing outcomes information about subgroups of interest over time that is aligned with reporting of wellbeing outcomes at a national level. The next steps for this work would be to:

1. identify and engage with interested parties
2. consult on the initial specifications and confirm a common set of information needs and survey approach/es for the local context
3. Build the survey instrument/s
4. Pilot the short form survey format/s.

It is envisaged that the development of the short form survey will be an iterative process. It will involve building and refining the survey over time to ensure that the data collected provides information of value to local organisations as well as testing and refining the approach to maximise comparability with national wellbeing data. This initial scoping provides a platform for engaging with organisations and provider agencies to confirm the information needs they have

and to jointly develop and pilot a short form survey that is suitable and relevant to their needs. For the resultant survey to be most useful, it will be important to consult with a range of different potential users so that the survey is developed in a way that is flexible enough to commonly meet their needs.

Once a survey approach has been developed for piloting –the comparability of data collected from a short form survey relative to the longer form NZGSS will require specific pilot testing to understand any impact that a shortened format may have on how individuals respond to the questions asked and how to best interpret these differences. To do so, it will be essential to include a specific research component to assess any differences between the short form approach and the long form national survey method. Establishing the level of comparability and what is required to conduct valid analysis across datasets such as the NZGSS, and potentially within the IDI, will create opportunities for more complex analyses. These can be used to better evaluate programmes and policies as well as to better understand the factors that contribute to improved wellbeing outcomes for local and service-based target groups.

Wellbeing measurement and reporting is currently a dynamic work focus across government in New Zealand and it will be important that this work augments rather than duplicates what is going on elsewhere. In particular, it will be important that this work connects with the on-going LSF work programme, any survey question and other changes to the NZGSS over time, the StatsNZ Indicators Aotearoa reporting focus and other national or local initiatives to develop new wellbeing survey questions and data collection approaches.

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APPENDIX A

INITIAL SHORT FORM SURVEY QUESTIONS

Detailed question format for adaptation from NZGSS-related suggested short form survey questions and questions to be developed.

Retrieved from <https://cdm20045.contentdm.oclc.org/digital/collection/p20045coll2/id/806/rec/6>

Demographic-related questions have not been included.

Please note that all response options also include *Don't know* and *Refused* as a potential response.

Reference to *The show cards* are cards that display the response options or rating scale that are shown to the respondent.

Topic area	Question focus	Question	Response options
Subjective wellbeing	Life satisfaction	I am going to ask you a very general question about your life as a whole these days. This includes all areas of your life. Looking at <i>the showcard</i> , where zero is completely dissatisfied, and ten is completely satisfied, how do you feel about your life as a whole?	11-point rating scale: 0 = completely dissatisfied; 10 = completely satisfied
Subjective wellbeing	Family wellbeing	I now have some questions about your family. First of all, I'd like you to think, in general, about how your family is doing. Looking at <i>the showcard</i> , where zero means extremely badly and ten means extremely well, how would you rate how your family is doing these days? IF NECESSARY: Include all areas of life for your family. IF NECESSARY: Your 'family' is the group of people that you think of as your family.	11-point rating scale: 0 = extremely badly 10 = extremely well
Health	General self-rating	This question is about your current health. Looking at <i>the showcard</i> , in general, would you say your health is excellent, very good, good, fair, or poor?	5-point rating scale: very good; good; fair; poor; very poor

Topic area	Question focus	Question	Response options
Health ⁵	Mental wellbeing (WHO-5)	<p>The next few questions are about how you have been feeling in the last two weeks.</p> <p>Looking at <i>the showcard</i>, in the last two weeks, how often have you:</p> <ul style="list-style-type: none"> - felt cheerful and in good spirits? - felt calm and relaxed? - felt active and vigorous? - woken up feeling fresh and rested? - felt that your daily life has been filled with things that interest you? 	5-point rating scale: most of the time; more than half of the time; less than half of the time; some of the time; at no time
Cultural Identity	Able to be yourself in NZ	<p>People in New Zealand have different lifestyles, cultures, and beliefs, that express who they are.</p> <p>Looking at <i>the showcard</i>, how easy or hard is it for you to be yourself in New Zealand?</p>	5-point rating scale: very easy; easy; sometimes easy, sometimes hard; hard; very hard
Civic engagement and governance	Trust in people	<p>And now a general question about trust.</p> <p>Looking at <i>the showcard</i>, on a scale of zero to ten, in general how much do you trust most people in New Zealand?</p>	11-point rating scale: 0 = not at all 10 = completely
Civic engagement and governance	Trust in institutions	<p>The following questions are about whether you have trust in various institutions in New Zealand.</p> <p>Even if you have had very little or no contact with these institutions, please base your answer on your general impression of these institutions.</p> <p>Looking at <i>the showcard</i>, on a scale of zero to ten, how much do you trust: - the police? - the education system? - the media?</p>	Asked for each of the three institutions separately 11-point rating scale: 0 = not at all 10 = completely

⁵ The inclusion of the WHO-5 mental wellbeing measure has been made as part of the 2020 preparation of this paper for publication to reflect heightened overall interest in monitoring mental health.

Topic area	Question focus	Question	Response options
Civic engagement and governance	Discrimination in past 12 months	<p>The next question is about discrimination in New Zealand. By discrimination, I mean being treated unfairly or differently compared to other people. <i>The showcard</i> lists some reasons why people may be discriminated against.</p> <p>SHOWCARD: Reasons for discrimination: age; skin colour; way of dress or appearance; race or ethnic group; accent or language spoken; gender; sexual orientation; religious beliefs; disability or health issues; any other reason</p> <p>In the last 12 months, have you been discriminated against?</p>	Response: yes, no
Income and consumption	Bill payment for utilities	Looking at <i>the showcard</i> , in the last 12 months, have [YouYouOrYourPartner] not paid electricity, gas, rates, or water bills on time, because of a shortage of money?	3-point response options: not at all; once; more than once
Income and consumption	Enough money	Looking at <i>the showcard</i> , how well does [Your, YouAndYourPartnersCombined] total income meet your everyday needs, for such things as accommodation, food, clothing, and other necessities?	3-point response options: only just enough money; enough money; more than enough money
Environment (suggested)	Local environment	<p><i>To be developed (adapted from Personal Wellbeing Index)</i></p> <p>On a scale from zero to ten - How satisfied are you with the quality of your local environment? Zero means you feel not at all satisfied and 10 means you feel completely satisfied.</p>	11-point rating scale: 0 = not at all satisfied 10 = completely satisfied
Environment (suggested)	Access to natural spaces	<p><i>To be developed:</i></p> <p>The extent to which people are satisfied with their access to natural spaces such as waterfronts, parks, and green spaces.</p>	<i>To be developed</i>
Housing	Too cold in winter	Looking at <i>the showcard</i> , in winter, is your house or flat colder than you would like?	4 response options: yes – often; yes sometimes; no; I have not spent a winter living in this house or flat

Topic area	Question focus	Question	Response options
Housing	Major dampness	Would you say this house or flat is always damp, sometimes damp, or not damp at all? IF NECESSARY: A damp house or flat may feel or smell damp, or have damp patches on the walls, ceiling, floor, or window frames.	3 response options: yes – always; yes – sometimes; not damp
Housing	Major mould	Does any part of your home get mould growing on it, for example, on the walls, ceiling, window frames, curtains, or blinds?	Response: yes, no
Housing	Bedrooms needed	How many bedrooms are there in your house or flat? Please count rooms or sleepouts furnished as bedrooms, or any caravan that this household uses as a bedroom.	Number of bedrooms
Safety	Walking in neighbourhood after dark	Now some questions about crime in New Zealand. Looking at <i>the showcard</i> , and thinking about crime, how safe or unsafe do you feel walking alone in your neighbourhood after dark?	5-point rating scale: very safe; safe; neither safe nor unsafe; unsafe; very unsafe
Social connections	Loneliness	People who have contact with family and friends can still feel lonely sometimes, while those who have little contact may not feel lonely at all. Looking at <i>the showcard</i> , in the last four weeks, how much of the time have you felt lonely?	4-point rating scale: a little of the time; some of the time; most of the time; all of the time
Social connections	Talking to someone if a bit depressed	Suppose you felt down or a bit depressed and wanted to talk with someone about it. Looking at <i>the showcard</i> , how easy or hard would it be to talk to someone?	5-point rating scale: very easy; easy; sometimes easy, sometimes hard; hard; very hard
Social connections	Could you ask someone if needed place to stay -	Suppose you urgently needed a place to stay. Looking at <i>the showcard</i> , how easy or hard would it be to ask someone you know to stay with them?	5-point rating scale: very easy; easy; sometimes easy, sometimes hard; hard; very hard

Topic area	Question focus	Question	Response options
Time use (suggested)	Free time	<i>To be developed:</i> Satisfaction with free time	<i>To be developed</i>
Time use (suggested)	Amount of free time available	<i>To be developed:</i> Satisfaction with the amount of time available to them to do the things they want to do.	<i>To be developed</i>
Jobs and earnings	Satisfaction with paid job (if employed)	Please think about the last four weeks in your job. Looking at <i>the showcard</i> , how do you feel about your job?	5-point rating scale: very satisfied; satisfied; no feeling either way; dissatisfied; very dissatisfied
Jobs and earnings (suggested)	Job stress	<i>To be developed</i>	<i>To be developed</i>

APPENDIX B

THE SF-12 AND MATERIAL WELLBEING INDEX QUESTIONS

Health - SF-12 questions

The SF-12 is based on the following questions:

1. In general, would you say your health is excellent, very good, good, fair or poor?
2. Please tell me if your health now limits you in the following activities: moderate activities such as moving a table, pushing a vacuum cleaner, bowling, or playing golf.
3. Please tell me if your health now limits you in the following activity: climbing several flights of stairs.
4. During the past four weeks, how much of the time have you accomplished less than you would like as a result of your physical health?
5. During the past four weeks, how much of the time were you limited in the kind of work or other regular daily activities you do as a result of your physical health?
6. During the past four weeks, how much of the time have you accomplished less than you would like as a result of any emotional problems, such as feeling depressed or anxious?
7. During the past four weeks, how much of the time did you do work or other regular daily activities less carefully than usual as a result of any emotional problems, such as feeling depressed or anxious?
8. During the past four weeks, how much did pain interfere with your normal work including both work outside the home and housework?
9. During the past four weeks, how much of the time have you felt calm and peaceful?
10. During the past four weeks, how much of the time did you have a lot of energy?
11. During the past four weeks, how much of the time have you felt downhearted and depressed?
12. During the past four weeks, how much of the time has your physical health or emotional problems interfered with your social activities, such as visiting friends, relatives etc.?

Material Wellbeing Index (MWI-9) questions

The MWI-9 is based on responses to the following questions:

- In the last 12 months, to what extent have you done any of the following things to keep costs down?
 1. gone without fresh fruit or vegetables?
 2. postponed or put off visits to the doctor?
 3. done without, or cut back on trips to the shops or other local places?
 4. spent less on hobbies or other special interests than you would like?

5. put up with feeling cold?
6. delayed replacing or repairing broken or damaged appliances?
7. When buying, or thinking about buying clothes or shoes for yourself, how much do you usually feel limited by the money available?
8. Imagine that you have come across an item that you would really like to have. This item costs \$300. It is not an essential item - it's an extra. If this happened in the next month, how limited would you feel about buying it?
9. In the last 12 months have you/you or your partner not paid electricity, gas, rates or water bills on time because of a shortage of money?