

January 2023

## CURRICULUM VITAE

**Jan E. Mutchler**

Gerontology Department and Gerontology Institute  
McCormack School of Policy Studies  
University of Massachusetts Boston  
100 Morrissey Boulevard  
Boston, MA 02125-3393  
(617) 287-7321  
E-Mail: jan.mutchler@umb.edu

### EDUCATION

Ph.D. (Sociology) The University of Texas at Austin, 1985

M.A. (Sociology) The University of Texas at Austin, 1981

B.A. (Sociology and Psychology) The University of Mississippi, 1978 (Graduate, University Scholars Program)

### PROFESSIONAL EXPERIENCE

2021-present	Director, Gerontology Institute, University of Massachusetts Boston
2012-2021	Director, Center for Social and Demographic Research on Aging, Gerontology Institute, University of Massachusetts Boston
2019-present	Faculty Affiliate, Department of Sociology, University of Massachusetts Boston
2008-2013	Graduate Program Director, Department of Gerontology, University of Massachusetts Boston
2008-2011	Chair, Department of Gerontology, University of Massachusetts Boston
2002-2012	Associate Director for Social and Demographic Research, Gerontology Institute, University of Massachusetts Boston
2001-present	Professor, Gerontology Department, and Fellow, Gerontology Institute, University of Massachusetts Boston
2004-2010	Adjunct Research Associate, Center for Population Studies, University of Mississippi
1999-2001	Associate Professor, Gerontology Department, and Fellow, Gerontology Institute, University of Massachusetts Boston
1999-2005	Adjunct Associate Professor, Department of Sociology, SUNY-Buffalo
1992-1998	Associate Professor, Department of Sociology, SUNY-Buffalo
1988-1992	Assistant Professor, Department of Sociology, SUNY-Buffalo
1985-1988	Assistant Professor, Department of Sociology, and Faculty Research Associate, Population Issues Research Center, The Pennsylvania State University
1984-1985	Fellow, American Association of University Women, The University of Texas at Austin

1981-1984          Research Associate, Population Research Center, The University of  
Texas at Austin

## HONORS AND AWARDS

Selection by the Boston Globe as a "Game Changer," May 2017, for work on making Boston more conducive to healthy aging.

Chancellor's Award for Distinguished Service, University of Massachusetts Boston, 2016  
Fellow, Gerontological Society of America (Behavioral and Social Sciences  
Section)

Outstanding Faculty Member, Undergraduate Sociology Association, SUNY-  
Buffalo, 1992

NYS/UUP Faculty Development Award, 1989; 1994; 1998, SUNY-Buffalo

Recipient, Student Paper Competition, Doctorate Level Category, Southwestern Sociological  
Association, 1984

University Fellowship, The University of Texas-Austin, 1979-1981

## PUBLICATIONS

- 2022          Li, Y; Mutchler, JE; Miller, EA; Tucker-Seeley, R & Xiao, JJ. Financial literacy in the family context: The role of spousal education and gender among older couples. Journal of Family Issues. <https://doi.org/10.1177/0192513X221105244>
- 2022          Li, Y & Mutchler, JE. Poverty and self-rated health in later life: The mediating role of material hardship. Social Science Quarterly 103(3), 521-533. <https://doi.org/10.1111/ssqu.13166>
- 2022          Mutchler, JE & Velasco Roldán, N. Economic resources shaping grandparent responsibility within three-generation households. Journal of Family and Economic Issues. DOI 10.1007/s10834-022-09842-3
- 2022          Somerville, C; Velasco Roldán, N; Bui, CN; Coyle, C. & Mutchler, J. Why don't older adults use senior centers? Evidence from adults age 50 and older in Massachusetts. Journal of Elder Policy. doi: 10.18278/jep.2.1.5
- 2022          Li, Y; Mutchler, JE; Miller, EA; Tucker-Seeley, R & Xiao, JJ. Space, context, and human capital: A micro-macro perspective on the social environment and financial literacy in later life. Population Research and Policy Review. <https://doi.org/10.1007/s11113-021-09695-y>
- 2021          Peng, C; Hayman, LA; Mutchler, JE & Burr, JA. Friendship and cognitive functioning among married and widowed Chinese older adults. Journals of Gerontology. <https://doi.org/10.1093/geronb/gbab213>
- 2021          Coyle, C; Gleason, S & Mutchler, JE. Spillover benefits and achieving

- sustainability of age-friendly communities. *The Gerontologist* 62(1), 29-35. (Special issue on age-friendly environments). <https://doi.org/10.1093/geront/gnab060>
- 2021 Wang, H., Han, S., Xu, P., Mutchler, J. E., Du, P., & Burr, J. A. Family, friendship, and loneliness among older Chinese adults: Urban-Rural Comparisons. In M. Silverstein (Ed.), *Aging Families in Chinese Society*. Routledge. <https://doi.org/10.4324/9781003015529-4>
- 2021 Yang, M & Mutchler, JE. A malady with no name: understanding experiences of depression among older Hmong refugees. *Journal of Cross-Cultural Gerontology* 36, 217-228. <https://doi.org/10.1007/s10823-021-09431-1>
- 2021 Mutchler, JE; Li, Y; & Velasco-Roldán, N. Precarious aging: The spatial context of racial and ethnic disparities in economic security. *Generations (Summer)*. <https://generations.asaging.org/racial-and-ethnic-disparities-economic-security>
- 
- 2021 Li, Y; Mutchler, JE; Miller, EA; Tucker-Seeley, R & Xiao, JJ. Does financial knowledge at older ages matter? Placing income and hardship in context. *Journal of Poverty* 26(3), 181-196. <https://doi.org/10.1080/10875549.2021.1890672>
- 2021 Burr, J; Mutchler, J & Han, S. Volunteering and health in later life. Chapter in K Ferraro, D Carr, V Freedman, E Idler & J Wilmoth (Eds.), *Handbook of Aging and the Social Sciences* (9<sup>th</sup> edition).
- 2020 Bui, C; Peng, C; Mutchler, J & Burr J. Race and ethnic group disparities in emotional distress among older adults during the COVID-19 pandemic. *The Gerontologist* 61(2), 262-272. Special issue on Gerontology in a Time of Pandemic. <https://doi.org/10.1093/geront/gnaa217>
- 2020 Han, S; Mutchler, J; Roberts S & Burr J. Volunteering, polygenic risk for Alzheimer's Disease, and cognitive functioning among older adults. *Social Science & Medicine*. <https://doi.org/10.1016/j.socscimed.2020.112970>
- 2020 Li, Y & Mutchler, J. Older adults and the economic impact of the COVID-19 pandemic. *Journal of Aging and Social Policy*. <https://doi.org/10.1080/08959420.2020.1773191>
- 
- Reprinted in EA Miller (Ed.) (2021). *Older adults and CO VID-19: Implications for aging policy and practice*. NY: Routledge.
- 2020 Wang, S & Mutchler, J. "The Implications of Providing Grandchild Care for Grandparents' Marital Quality". *Journal of Family Issues*.
- 2019 Li, Y & Mutchler, J. Do consequences of hardship narrow in later life? The impact of hardship on self-rated health among older adults. *Annals of Epidemiology*, 37, 4-9.

<https://doi.org/10.1016/j.annepidem.2019.08.002>

- 2019 Yang, M & Mutchler, J. The high prevalence of depressive symptoms and its correlates among older Hmong refugees in the United States." Journal of Aging and Health. <https://doi.org/10.1177/0898264319844088>
- 2019 Chen, Elizabeth; Pu, Charles; Bernacki, Rachele; Ragland, Julia; Schwartz, Jonathon; Mutchler, Jan. Surrogate Preferences on the Physician Orders for Life-Sustaining Treatment Form. The Gerontologist, 59(5), 811-821. <https://doi.org/10.1093/geront/gny042>
- 2018 Mutchler, J., Li, Y. & Xu, P. How strong is the Social Security safety net? Using the Elder Index to assess gaps in economic security. Journal of Aging and Social Policy, 31(2), 123-137. <https://doi.org/10.1080/08959420.2018.1465798>
- 2017 Coyle C & Mutchler J. Aging with disability: Advancement of a cross-disciplinary research network. Research on Aging, 39, 683-692. DOI:10.1177/0164027516681895
- 2017 Burr, J., Han, S., Lee, H.J., Tavares, J. & Mutchler, J. Health benefits associated with three helping behaviors: Evidence for incident cardiovascular disease. Journal of Gerontology: Social Sciences, 73(3), 492-500. doi: 10.1093/geronb/gbx082
- 2016 Perez, G., Mutchler, J., Yang, M., Park, E. Promoting quality care in cancer patients with Limited English Proficiency: Perspectives of medical interpreters. Psycho-Oncology, 25(10), 1241-1245. DOI 10.1002/pon.4176
- 2016 Park, E. Mutchler, J., Perez, G., Goldman, R., Niles, H., Haime, V., Foxtree-McGrath, C., Yang, M., Donelan, K., Pirl, W., Woolridge, D., & Suarez, J. Coping and resiliency enhancement program (CARE): A pilot study for interpreters in cancer care. Psycho-Oncology, 26(8), 1181-1190. DOI: 10.1002/pon.4137
- 2016 Coyle, C., Putnam, M., Kramer, J. & Mutchler, J.E. The Role of Aging and Disability Resource Centers in Serving Adults Aging with Intellectual Disabilities and Their Families: Findings from Seven States. Journal of Aging and Social Policy, 28(1), 1-14. DOI: 10.1080/08959420.2015.1096142
- 2016 Mutchler, J., Han, S. & Burr, J. Productive aging. Pp 200-205 in H. Fillit, K. Rockwood & K. Woodhouse (Eds.), Brocklehurst's Textbook of Geriatric Medicine and Gerontology (8<sup>th</sup> edition). NY: Elsevier.
- 2016 Mutchler, J. & Somerville, C. Gender, race, and ethnicity and the life course. Pp. 111-136 in M. Harrington-Meyer & E. Daniele (Eds.), Gerontology: Changes, challenges,

and solutions. NY: Praeger.

- 2015 Mutchler, J., Lyu, J., Xu, P. & Burr, J. Is cost of living related to living alone among older persons? Evidence from the Elder Economic Security Standard Index. Journal of Family Issues, 38(17), 2495-2511. DOI:10.1177/0192513X15606773
- 2015 Mutchler, J., Shih, Y-C., Lyu, J., Bruce, E., & Gottlieb, A. The Elder Economic Security Standard Index: A new indicator for evaluating economic security in later life. Social Indicators Research, 120, 97-116. DOI: 10.1007/s11205-014- 0577-y
- 2014 Coyle, C., Kramer, J., & Mutchler, J. Aging together: Sibling carers of adults with intellectual and developmental disabilities. Journal of Policy and Practice in Intellectual Disabilities, 11, 302-312. DOI: 10.1111/jppi.12094
- 2013 Wright A, Stieglitz H, Kupersztoch YM, Paulk ME, Kim Y, Katz IT, Munoz F, Jimenez RB, Mutchler J, Rivera L, Back AL, and Prigerson HG. United States acculturation and cancer patients' end-of-life care. PLoS ONE. DOI: 10.1371/journal.pone.0058663.
- 2013 Johnson, K., & Mutchler, J. The emergence of a positive gerontology: From disengagement to social involvement. The Gerontologist, 54, 93-100. DOI: 10.1093/geront/gnt099
- 2013 Tavares, J., Burr, J., & Mutchler, J. Race differences in the relationship between formal volunteering and hypertension: Results from the Health and Retirement Study. Journal of Gerontology: Social Sciences, 68, 310-9. DOI: 10.1093/geronb/gbs162
- 2013 Jimenez R, Zhang B, Joffe S, Nilsson M, Rivera L, Mutchler J, Lathan C, Paulk E, and Prigerson H. Clinical trial participation among ethnic/racial minority and majority patients with advanced cancer: What factors most influence enrollment? Journal of Palliative Medicine, 16. DOI: 10.1089/jpm.2012.0413 .
- 2013 Burr, J., Mutchler, J., & Gerst, K. Hispanic residential segregation and immigrant living arrangements in later life. Population Research and Policy Review, 32, 2545. DOI 10.1007/s11113-012-9258-1.
- 2012 Yang, M. S., Burr, J., & Mutchler, J. "The Prevalence of Sensory Deficits, Functional Limitations, and Disability among Older Southeast Asians in the United States." Journal of Aging and Health, 24, 1252-1274. DOI 10.1177/0898264312457413
- 2012 Burr, J., Lowenstein, A., Tavares, J., Coyle, C., Mutchler, J., Katz, R., & Khatutsky, G. "Living Arrangements of Older Immigrants from the Former Soviet Union: Comparing Israel and the United States." Journal of Aging Studies, 26, 401-409. DOI

10.1016/j.jaging.2012.05.002

- 2012 Burr, J., & Mutchler, J. "Housing Characteristics of Older Asian Americans." Journal of Cross-Cultural Gerontology, 27, 217-37. DOI 10.1007/s10823-012- 9173-2
- 2011 Mutchler, Jan E. and Jeffrey A. Burr. "Social Dimensions of Aging: Race and Ethnicity." Pp. 83-101 in R. Settersten & J. Angel (eds.), Handbook of the Sociology of Aging. New York: Springer.
- 2011 Burr, J., Mutchler, J., & Gerst, K. (2011). "Homeownership among Mexican Americans in later life." Research on Aging, 33, 379 - 402. doi: 10.1177/0164027511400432
- 2011 Burr, Jeffrey A., Jane Tavares and Jan E. Mutchler. "Volunteering and Hypertension Risk in Later Life." Journal of Aging and Health, 23(1), 41-50. doi: 10.1177/0898264310388272
- 2010 Burr, Jeffrey A., Jan E. Mutchler, and Kerstin Gerst. "Patterns of Residential Crowding among Hispanics in Later Life: Immigration, Assimilation, and Housing Market Factors." Journals of Gerontology, 65B, 772-782. doi: 10.1093/geronb/gbq069
- 2010 Caro, Francis G., Jeffrey A. Burr, Eilon Caspi, and Jan E. Mutchler. "Motives that Bridge Diverse Activities of Older People." Activities, Adaptation & Aging, 34, 115-134.
- 2010 Burr, Jeffrey A., Kerstin Gerst, and Jan E. Mutchler. "Public Policy and Populations of Color." Pp. 160-182 in R. Hudson (ed.), The New Politics of Old Age. Baltimore, MD: Johns Hopkins University Press.
- 2010 Baker, Lindsey A. and Jan E. Mutchler. "Poverty and Material Hardship in Grandparent Headed Households." Journal of Marriage and Family, 72, 947-962. DOI: 10.1111/j.1741-3737.2010.00741.x
- 2009 Caro, Francis G., Eilon Caspi, Jeffrey A. Burr, and Jan E. Mutchler. "Global Activity Motivation and Activities of Older People." Activities, Adaptation & Aging, 33, 191-208.
- 2009 Mutchler, Jan E. and Lindsey A. Baker. "The Implications of Grandparent Coresidence for Economic Hardship among Children in Mother-Only Families." Journal of Family Issues, 30, 1576-1597. doi: 10.1177/0192513X09340527
- 2008 Burr, Jeffrey A., Kirsten Gerst, Ngai Kwan and Jan E. Mutchler. "The Economic Well-Being and Welfare Program Participation of Older Immigrants." Generations (Special Issue on older immigrants, edited by J. Treas), 32 ,53-60.

- 2008 Mutchler, Jan E. "Family and Household Structure, Later Life." Entry in Encyclopedia of the Life Course and Human Development. Farmington Hills, MI: Gale.
- 2008 Gerst, Kirsten and Jan E. Mutchler. "Poverty, Later Life." Entry in Encyclopedia of the Life Course and Human Development. Farmington Hills, MI: Gale.
- 2008 Mutchler, Jan E. and Jeffrey A. Burr. "Varieties of Wellbeing: Race, Class, Gender, and Age." Pp. 23-46 in R. B. Hudson (Ed.), Boomer Bust? Economic and Political Dynamics of the Graying Society. New York: Praeger.
- 2007 Mutchler, Jan E., Lindsey A. Baker and SeungAh Lee. "Grandparents Responsible for Grandchildren in Native American Families." Social Science Quarterly, 88, 990-1009. DOI: 10.1111/j.1540-6237.2007.00514.x
- 2007 Burr, Jeffrey A., Jan E. Mutchler, and Francis Caro. "Productive Activity Clusters among Middle-Aged and Older Persons: Intersecting Forms and Time Commitments." Journal of Gerontology: Social Sciences, 62B, S267-S275. PMID: 17673540
- 2007 Burr, Jeffrey A. and Jan E. Mutchler. "Employment in Later Life: A Focus on Race/Ethnicity and Gender." Generations, 31, 37-44.
- 2007 Choi, Namkee, Jeffrey A. Burr, Jan E. Mutchler, and Francis Caro. "Formal and Informal Volunteer Activity and Spousal Caregiving among Older Adults." Research on Aging, 29, 99-125.
- 2007 Burr, Jeffrey A. and Jan E. Mutchler. "Independent Living Arrangements among Older Persons: Individual and Contextual Factors." Population Research and Policy Review, 26, 85-101.
- 2007 Mutchler, Jan E., Archana Prakash and Jeffrey A. Burr. "The Demography of Disability and the Effects of Immigrant History: Older Asians in the United States." Demography, 44, 251-263. PMID: 17583304.
- 2007 Mutchler, Jan E., Gonzalo Bacigalupe, Antonia Coppin and Alison Gottlieb. "Language Barriers Surrounding Medication Use among Older Latinos." Journal of Cross-Cultural Gerontology, 22(1), 101-114. PMID: 17136455.  
[Reprinted in I. Stavans (Ed), Health Care. The Ilan Stavans Library of Latino Civilization. Santa Barbara, CA: Greenwood.]
- 2005 Burr, Jeffrey A., Namkee Choi, Jan E. Mutchler, and Francis G. Caro. "Caregiving and Volunteering: Are Private and Public Helping Behaviors Linked?" Journal of Gerontology: Social Sciences, 60, S247-S256. PMID: 16131625
- 2005 Burr, Jeffrey A., Jan E. Mutchler and Jennifer Warren. "State Commitment to

- Home and Community-Based Services: Effects on Independent Living for Older Unmarried Women." Journal of Aging and Social Policy, 17, 1-18. PMID: 15760798
- 2004 Mutchler, Jan E. and Lindsey A. Baker. "A Demographic Examination of Grandparent Caregivers in the Census 2000 Supplementary Survey." Population Research and Policy Review, 23, 359-377.
- 2003 Mutchler, Jan E. and Jeffrey A. Burr. "Living Arrangements among Older Persons: A Multilevel Analysis of Housing Market Effects." Research on Aging, 25, 531-558.
- 2003 Burr, Jeffrey A. and Jan E. Mutchler. "English Language Skills, Ethnic Concentration, and Household Composition: Older Mexican Immigrants." Journal of Gerontology: Social Sciences, 58B, S83-S92. PMID: 12646597
- 2003 Mutchler, Jan E., Jeffrey A. Burr, and Francis C. Caro. "From Paid Worker to Volunteer: Leaving the Paid Workforce and Volunteering in Later Life." Social Forces, 81, 1267-1293.
- 2002 Mutchler, Jan E. "Employment of Older Workers." The Macmillan Encyclopedia of Aging.
- 2000 Mutchler, Jan E. and Jacqueline L. Angel. "Policy Development and the Older Latino Population in the 21<sup>st</sup> Century." Journal of Aging and Social Policy, 11, 177-188. Also in F. Caro, R. Morris, and J. Norton (Eds.), Advancing Aging Policy as the 21<sup>st</sup> Century Begins. New York: Haworth Press. PMID: 11185043.
- 1999 Mutchler, Jan E., Jeffrey A. Burr, Michael P. Massagli and Amy Pienta. "Work Transitions and Health in Later Life." Journal of Gerontology: Social Sciences, 54B, S252-S261. PMID: 10542827
- 1999 Mutchler, Jan E. and Sara Brallier. "English Language Proficiency among Older Hispanics in the United States." The Gerontologist 39:310-319. PMID 10396889
- 1999 Burr, Jeffrey A. and Jan E. Mutchler. "Race and Ethnic Variation in Norms of Filial Responsibility among Older Persons." Journal of Marriage and the Family, 61, 674-687.
- 1997 Mutchler, Jan E. "The Sociology of Aging: Implications for Public Policy." International Journal of Sociology and Social Policy 17:1-7.
- 1997 Mutchler, Jan E., Jeffrey A. Burr, Amy Pienta, and Michael P. Massagli. "Pathways to Labor Force Exit: Work Transitions and Work Instability." Journal of



- Gerontology: Social Sciences 52B:S4-S12. PMID: 9008677
- 1996 Burr, Jeffrey A., Michael P. Massagli, Jan E. Mutchler, and Amy Pienta. "Labor Force Transitions among Older African American and White Men." Social Forces 74:963-982.
- 1994 Pienta, Amy, Jeffrey A. Burr and Jan E. Mutchler. "Women's Labor Force Participation in Later Life: The Effects of Early Work and Family Experience." Journal of Gerontology: Social Sciences 49:S231-239. PMID: 8056952
- 1994 Mutchler, Jan E. and Susan Bullers. "Gender Differences in Source of In-Home Care in Later Life." Research on Aging 16:235-250.
- 1993 Burr, Jeffrey A. and Jan E. Mutchler. "Ethnic Living Arrangements: Cultural Convergence or Cultural Manifestation?" Social Forces 72:169-80.
- 1993 Burr, Jeffrey A. and Jan E. Mutchler. "Nativity, Acculturation, and Economic Status: Explanations of Asian American Living Arrangements in Later Life." Journal of Gerontology: Social Sciences 48:S55-63. PMID 8473706
- 1992 Mutchler, Jan E. "Living Arrangements and Household Transitions among the Unmarried in Later Life." Social Science Quarterly 73:565-80.
- 1992 Burr, Jeffrey A. and Jan E. Mutchler. "The Living Arrangements of Unmarried Elderly Hispanic Females." Demography 29:93-112. PMID: 1547905
- 1991 Mutchler, Jan E. and Jeffrey A. Burr. "A Longitudinal Analysis of Household and Nonhousehold Living Arrangements in Later Life." Demography 28:375-90. PMID: 1936374
- 1991 Mutchler, Jan E. and Jeffrey A. Burr. "Racial Differences in Health and Health Care Service Utilization in Later Life: The Effect of Socioeconomic Status." The Journal of Health and Social Behavior 32: 342-56. PMID: 1765625  
[Excerpt reprinted in E. Stoller and R. Gibson (1994) A World of Difference: Structural Inequality and the Aging Experience. Newbury Park, CA: Pine Forge Press.]
- 1990 Mutchler, Jan E. "Household Composition among the Nonmarried Elderly: A Comparison of Black and White Women." Research on Aging 12:487-506. PMID: 2277859
- 1989 Mutchler, Jan E. and Lauren J. Krivo. "Availability and Affordability: Household Adaptation to a Housing Squeeze." Social Forces 68:241-61.
- 1989 Krivo, Lauren J. and Jan E. Mutchler. "Elderly Persons Living Alone: The Effect

- of Community Context on Living Arrangements." Journal of Gerontology:Social Sciences 43:S54-62. PMID: 2921479
- 1987 Mutchler, Jan E. "Gender Differences in the Effect of Family Status on Underemployment." International Journal of Sociology and Social Policy 7:5-18.
- 1987 Mutchler, Jan E. and W. Parker Frisbie. "Household Structure Among the Elderly: Racial/Ethnic Differentials." National Journal of Sociology 1:3-23.
- 1986 Clogg, Clifford C., Teresa A. Sullivan and Jan E. Mutchler. "Measuring Underemployment and Inequality in the Work Force." Social Indicators Research 18:375-393.
- 1986 Krivo, Lauren J. and Jan E. Mutchler. "Housing Constraint and Household Complexity in Metropolitan America: Black and Spanish Origin Minorities." Urban Affairs Quarterly 21:389-409.
- 1986 Frisbie, W. P., F. D. Bean, R. Kaufman and J. E. Mutchler. "Immigration and Household Structure among the Mexican Origin Population of the United States." Pp. 74-99 in H. Browning and R. de la Garza, (eds.), Mexican Immigrants and Mexican Americans: An Evolving Relationship. Austin, Texas: University of Texas Press.
- 1985 Sullivan, Teresa A. and Jan E. Mutchler. "Equal Pay or Equal Work? The Implications of Underemployment for Comparable Worth." Pp. 175-192 in R. Simpson and I. Simpson (eds.), Research in the Sociology of Work, Vol. 3. Greenwich, CT: JAI Press.
- 1983 Mutchler, Jan E. and Dudley L. Poston, Jr. "Do Females Necessarily Have the Same Occupational Status Scores as Males?: A Conceptual and Empirical Examination of the Duncan Socioeconomic Status Index and Nam-Powers Occupational Status Scores." Social Science Research 12:353-362.

## **GRANT ACTIVITY**

### Grants and Contracts Received:

The Silver Century Foundation. "Promoting Financial Security in Later Life Using the Elder Index." 9/22-8/25. Principal investigator.

Taub Foundation. "Promoting Financial Security in Later Life Using the Elder Index." 4/22-3/25. Principal investigator.

RRF Foundation for Aging (subcontract from NCOA). "Turning the Tide on Economic

Insecurity in the Later Years: Using a Modernized Approach to a Historic Problem." Principal investigator of subcontract.

Tufts Health Plan Foundation. "Reframing Aging for Higher Education." 10/219/22. Co-principal investigator with Caitlin Coyle.

Executive Office of Elder Affairs. "Massachusetts Remote Employment Demonstration Project Evaluation." 4/21-6/23. Principal investigator.

AARP Foundation. "Filling in the Gap: Culturally Responsive Outreach for Economic Opportunities." 7/20-6/22. Co-investigator with Caitlin Coyle, in partnership with The Institute for Asian American Studies, The Institute for New England Native American Studies, The Mauricio Gastón Institute for Latino Community Development and Public Policy, and The William Monroe Trotter Institute for the Study of Black Culture.

Age Strong Commission, City of Boston. "Financial Security and Older Adults in Boston." 9/20-5/22. Principal investigator.

Faculty Fund for Enhancing Interdisciplinary Research (FIR). "Information & Communication Technologies (ICT) or Older Chinese Immigrants: a holistic assessment. 6/21-7/23. Co-PI with Lingling Zhang and Sun Kim.

McCormack Graduate School, Collaborative Interdisciplinary Research Award Program. "Age Strong for All: Building equity in aging in Boston." 2/20-5/21. Principal investigator. In partnership with The Institute for Asian American Studies, The Institute for New England Native American Studies, The Mauricio Gastón Institute for Latino Community Development and Public Policy, and The William Monroe Trotter Institute for the Study of Black Culture.

Rutgers University (subcontract). "The 2018-2019 Elder Index for New Jersey." 4/19-10/20. Principal investigator.

Retirement Research Foundation and a coalition of other funders. "Building Sustainability for the Elder Index." 9/18-8/21. Principal investigator.

Tufts Health Plan Foundation, President's Leadership Fund. "Age-Friendly Boston: Phase II Continuation." 7/18-6/20. Principal investigator.

Lincoln Institute of Land Policy. "Impact of Aging Populations on Municipal Fiscal Health." 5/2/18-6/30/19. Principal investigator.

Tufts Health Plan Foundation, President's Leadership Fund. "Age-Friendly Boston: Phase II." 7/17-6/18. Principal investigator.

Rutgers University (subcontract). "The 2016 Elder Index for New Jersey." 6/178/17. Principal

investigator.

Retirement Research Foundation. "Updating the Elder Index." 1/16-12/16. Principal investigator.

Rutgers University (subcontract). "The 2015 Elder Index for New Jersey." 5/16-6/16. Principal investigator.

Atlantic Philanthropies. "Updating the Elder Index. 9/15-10/16. Principal investigator.

Massachusetts Association of Councils on Aging. "Database on COA Resources, Programs, and Services." 3/16-5/18. Principal investigator.

Tufts Health Plan Foundation, President's Leadership Fund. "Age-Friendly Boston: Phase I." 7/15-6/17. Principal investigator.

University of Massachusetts Boston, Public Service Grant Program. "Age-Friendly Boston Initiative: A Compendium of Community Programs and Partners." 7/15-6/16. Principal investigator.

University of Massachusetts President's Office, Creative Economy Initiative. "Mapping Community Assets to Improve Livability for Older Adults in Massachusetts." 6/14-6/15. Principal investigator, with Bernard Steinman.

Atlantic Philanthropies (subcontract through Wider Opportunities for Women). "The National Elder Economic Security Standard Index." 1/14-7/15. Principal investigator of subcontract.

Borchard Foundation. "Bridging Aging and Disability: The Role of Aging and Disability Resource Centers in Serving Adults Aging with Intellectual Disabilities and Their Family Caregivers." 1/14-1/15. Principal investigator.

National Institutes of Health/National Cancer Institute. "Developing a Resiliency Program for Medical Interpreters in Cancer Care." Project funded as part of the UMass Boston/Dana Farber Harvard Cancer Center U54 Partnership. 9/12-8/14. Co-principal investigator (with E Park).

National Institutes of Health/National Cancer Institute. "Latino End-of-Life Care: Patient, Provider, & Institutional Effects." Project funded as part of the UMass Boston/Dana Farber Harvard Cancer Center U54 Partnership. 9/10-8/13. Coprincipal investigator (with H Prigerson & P Maciejewski).

Atlantic Philanthropies (subcontract through Wider Opportunities for Women). "The National Elder Economic Security Standard Index." 10/07-4/12. Coprincipal investigator of subcontract (with E. Bruce).

Hartford/RAND Foundation. Center for Interdisciplinary Geriatric Health Care Research. 10/06-12/08. Co-investigator (with J. Gurwitz, Geriatric Medicine, U of Massachusetts Medical School, Worcester, and K. Miller, Graduate School of Nursing U of Massachusetts Medical School, Worcester).

National Institute on Aging. "Language, Ethnic Community and Older Immigrant Households." (Grant #R01 AG218690). 9/04-8/08. Co-investigator with J. Burr.

National Institute of Child Health and Human Development. "Grandparent Families in the 2000 Census." (Grant #R03 HD045579-01). 1/04-12/06.  
Principal Investigator.

National Institute of Child Health and Human Development. "Social Demography of Children Living with Grandparents." (Grant #R03 HD043333-01). 9/03-8/06.  
Principal Investigator.

National Institute on Aging. "Changes in Productive Activity in Later Life." (Grant #R03 AG18910). 9/01-9/03. Co-Investigator (with J. Burr and F. Caro).

National Institute on Aging. "Medication Use and English Proficiency: Hispanic Elders." (Grant #1 R03 AG19857-01). 9/01-8/03. Principal Investigator (with G. Bacigalupe and A. Gottlieb).

The Boston Foundation. "Elders in Family Housing." 7/01-6/02. Co-investigator (with F. Caro and staff from the Boston Housing Authority).

National Institute on Aging. "Individual and Community Factors in Independent Living." (Grant #R01 AG18331). 7/01-6/03. Co-Investigator (with J. Burr).

The Commonwealth of Massachusetts. "Kinship Care in Massachusetts." 3/027/02. Principal Investigator.

Joint Center for Poverty Research, Northwestern University/University of Chicago, Small Grants Program. "Child Poverty, Program Participation, and Intergenerational Coresidence: Evidence from the SIPP." 6/97-6/98. Principal Investigator.

Administration on Aging. "Minority Aging in a Diverse Society: Community, Family, and Individual Determinants of Living Arrangements." 9/95-9/97. Principal Investigator.

National Science Foundation. "Geographical and Sociological Models of Intergenerational Relations." 9/94-9/96. Co-Investigator (with P. Rogerson and J. Burr).

AARP Andrus Foundation. "Rediscovering the Labor Force: Work Behavior and Economic Status of Older Men Before and During the Retirement Years." 1/1/936/30/94. Co-Principal Investigator (with J. Burr).

Office of the Vice Provost for Graduate Research, SUNY at Buffalo. "Graduate Group in Demography." 1992-1998. Co-Principal Investigator.

SUNY-Buffalo Research Development Funds, "Women's Labor Force Exit and Quality of Work Outcomes Across the Life Course," 1991-1992. Principal Investigator.

National Institute on Aging, "Change in Elderly Households: Race/Ethnic Comparisons" (Grant #1-R01-AG07405), 9/1/88-8/31/91. Principal Investigator.

Conferences in the Discipline, University at Buffalo. "Demography of Aging: Interdisciplinary Perspectives," 1989-1990. Contributing investigator.

Research Initiation Grant, The Pennsylvania State University. "The Elderly Who Live Alone: A Longitudinal Analysis," 1986-1987. Principal Investigator.

National Science Foundation Dissertation Improvement Grant, "Demographic and Structural Determinants of Underemployment," 1984-1985. Principal Investigator.

American Association of University Women American Dissertation Fellowship, "Demographic and Structural Determinants of Underemployment," 1984-1985. Principal Investigator.

#### **PAPERS PRESENTED AT PROFESSIONAL MEETINGS** (last ten years)

- 2021 "Intergenerational tutoring: Older adults supporting children's academic needs via video conferencing." Poster presented at the Gerontological Society of America, November (with J Hoffman, E Miller, J Burr, J Hermelbracht, R Volpe, R Codding & A Briesch).
- 2021 "Evaluating the economic impact of marriage versus cohabitation in same-sex couples age 50+." Poster presented at the Gerontological Society of America, November (with S Massihzadegan).
- 2021 "Spillover benefits and achieving sustainability of age-friendly communities." Paper presented at the Gerontological Society of America, November (with S Gleason and C Coyle).
- 2021 "Space, context, human capital: A macro-micro perspective on social environment and financial literacy in later life." Paper presented at the Gerontological Society of America, November (with Y Li, E Miller, J J Xiao & R D Tucker-Seeley).
- 2021 "Who and where? The spatial context of racial and ethnic disparities in economic security among older adults." Poster presented at the Gerontological Society of America, November (with Y Li & N Velasco Roldan).
- 2020 "How does cost of living impact financial well-being? Exploring the relationship between the CFPB Financial Well-being Score and the Elder Index." Paper presented at the Gerontological Society of America, November, online (with Y Li).
- 2020 "Volunteering, polygenic risk for Alzheimer's disease, and cognitive decline among older adults." Paper presented at the Population Association of America, April, Washington DC (with S Han, J Burr & S Roberts).
- 2020 "Age-friendly initiatives: Occupational therapy practitioner's role in making communities a place

- where people can stay healthy and active as they age". Poster presented at the American Occupational Therapy Association, March, Boston, MA (with S Berger & C Coyle).
- 2019 "Impact of Aging Populations on Municipal Emergency Medical Services." Poster presented at the Gerontological Society of America, November, Austin, TX (with N Velasco Roldan, C Coyle & M Ward).
- 2019 "Consequences of Economic Hardship and Self-Rated Health among Older Adults." Poster presented at the Gerontological Society of America, November, Austin, TX (with Y Li).
- 2018 "Volunteering, Polygenic Risk for Alzheimer's Disease, and Cognitive Functioning among Older Adults." Poster presented at the Gerontological Society of America, November, Boston, MA (with S Han, J Burr & JS Roberts).
- 2018 "Factors Shaping Grandparents' Responsibility for Grandchildren in Three- Generation Households." Poster presented at the Population Association of America, April, Denver, CO (with N Velasco).
- 2018 "Intergenerational Social Mobility and Depression Among Middle-Aged U.S. Adults: A Cross-Generation, Cross-Gender Investigation." Poster presented at the Population Association of America, Denver, CO (with H. Wang & J. Burr).
- 2018 "Health Consequences of Retirement among Couples: The Moderating Effect of Education." Paper presented at the Population Association of America, Denver CO, April (with S Han & J Burr).
- 2018 "The Elder Economic Security Standard Index". Paper presented at the American Society on Aging, San Francisco, CA, March.
- 2017 "Living Arrangements and Loneliness among Older Chinese Adults: Evidence from the Chinese Longitudinal Aging Social Survey." Invited paper presented at the International Conference on Population Dynamics in Sustainable Development Era: Fertility Transition and Social Policies Response, Beijing, China, December (with H. Wang, S. Han, P. Xu, P. Du, J. Burr).
- 2017 "Economic Security in Later Life: Issues and Methods for Low-Fertility Countries." Invited paper presented at the International Conference on Population Dynamics in Sustainable Development Era: Fertility Transition and Social Policies Response, Renmin University, Beijing, China, December 4-5 (with Li, Y and Xu, P).
- 2017 "The Relationship Between Disease Burden, Care Setting, and Life-Sustaining Treatment Choices." Paper presented at the IAGG World Congress of Gerontology and Geriatrics, San Francisco CA, July (with Chen, E.E.; Pu, C.T., Ragland, J.; Schwartz, J.; Fairbanks, M.).
- 2017 "Advance Care Conversations by MD or NP/PA Yield Similar Life-Sustaining Treatment Choices." Paper presented at the IAGG World Congress of Gerontology and Geriatrics, San Francisco CA, July (with Chen, E.E.; Pu, C.T., Ragland, J.; Schwartz, J.; Fairbanks, M.).
- 2017 "Proxy Decision-Makers Choose Less Aggressive End-of-Life Interventions Than Patients." Paper presented at the IAGG World Congress of Gerontology and Geriatrics, San Francisco CA, July (with Chen, E.E.; Pu, C.T., Ragland, J.; Schwartz, J.; Fairbanks, M.).
- 2017 "Factors shaping grandparents' responsibility for grandchildren in three- generation households." Poster presented at the IAGG World Congress of Gerontology and Geriatrics, San Francisco CA, July (with N. Velasco).
- 2017 "Mental Health Status of Middle-Aged and Older Hmong Refugees in the US." Poster

- presented at the IAGG World Congress of Gerontology and Geriatrics, San Francisco CA, July (with M Yang).
- 2017 "The 2016 Elder Economic Security Standard Index: Geographic and Demographic Aspects." Poster presented at the IAGG World Congress of Gerontology and Geriatrics, San Francisco CA, July (with Y Li and P Xu).
- 2017 "Using the 2016 Elder Economic Security Standard Index to Promote Economic Security in Later Life." Presentation at the annual meetings of the American Society on Aging, March, Chicago IL.
- 2016 "The 2015 Elder Economic Security Standard Index: Geographic and Demographic Disparities." Paper presented at the Gerontological Society of America, New Orleans, November (with P Xu and Y Li).
- 2016 "Recommendations for improving livability: Results from the Age-Friendly Boston Initiative." Paper presented at the Gerontological Society of America, New Orleans, November (with H Gleason, C Coyle, M Evans and N Gallopyn).
- 2016 "Proxy Decision-Makers Choose Less Aggressive End-of-Life Interventions Than Patients." Poster presented at the Gerontological Society of America, New Orleans, November (with E Chen, C Pu, J Ragland, J Schwartz, M Fairbanks).
- 2016 "Advance Care Planning Conversations by MD or NP/PA Yield Similar Life Sustaining Treatment Choices." Poster presented at the Gerontological Society of America, New Orleans, November (with E Chen, C Pu, J Ragland, J Schwartz, M Fairbanks).
- 2016 "Helping Others, Cardiovascular Disease and Mortality Among Middle-Aged and Older Adults: The Role of Gender" Paper presented at the annual meetings of the Population Association of America, April, Washington DC (with J Burr, S. Han & J Tavares).
- 2016 "Boston's Age-Friendly Initiative." Presentation at the annual meetings of the American Society on Aging, March, Washington DC.
- 2015 "How patients decide to limit aggressive end-of-life care." Poster presented at IHI Scientific Symposium, December, Orlando, FL (with E. Chen, J. Cromwell, M. Fairbanks, E. Miller, J. Moschella, J. Schwartz, C Pu).
- 2015 "Mapping Assets to Improve Livability for Older Adults: Boston's Age Friendly Community Initiative. Poster presented at the meetings of the Gerontological Society of America, November, Orlando FL (with B. Steinman, S. Wang, C. Somerville, M. Khaniyan, H. Gleason, and M. Yang).
- 2015 "Development of a resiliency program for interpreters in cancer care. Paper presented at the annual meetings of World Congress of Psycho-Oncology, JulyAugust, Washington DC (with E. Park, G. Perez, R. Goldman, C. FoxTree- McGrath, M. Yang & J. Suarez).
- 2014 "The Role of Aging and Disability Resource Centers in Serving Adults Aging with Intellectual Disabilities and Their Family Caregivers." Paper presented at the meetings of the Gerontological Society of America, November, Washington DC (with C. Coyle, J. Kramer, and M. Putnam).
- 2014 "Explaining Geographic Variation in Economic Insecurity in Later Life." Poster presented at the meetings of the Gerontological Society of America, November, Washington DC (with J. Lyu).
- 2014 "Advance Care Planning - An Integral Part of Healthy Aging." Poster presented at the conference Health Aging in the Commonwealth: Charting a Path Forward, January, Newton,



MA (with E. Chen).

- 2013 "Changing Profiles in Family Caregiving: Sibling Caregivers of Adults Aging with Intellectual or Developmental Disabilities." Poster presented at the Roundtable on Aging and Intellectual Disability, International Association for the Scientific Study of Intellectual Disabilities, September, Boston, MA (with C Coyle and J Kramer). Poster at <https://iassid.org/conference/index.php/AID/Aging2013>
- 2013 "Medical Orders for Life-Sustaining Treatment (MOLST) in a Long-Term Acute Care Setting: Preliminary Results." Poster presented at the meetings of the Gerontological Society of America, November, New Orleans (with E. Chen, J Schwartz, J Moschella, S Moore, J Fucile, M Nguyen, and T O'Malley).
- 2013 "How does Cost of Living Shape Living Alone? Evidence from the Elder Economic Security Standard Index." Poster presented at the meetings of the Gerontological Society of America, November, New Orleans (with J Burr, P Xu and J Lyu).
- 2013 "Racial/ethnic Differences in End-of-Life Treatment Preferences: The Role of Religious Beliefs about Care." Poster presented at the meetings of the American Society of Clinical Oncology, June, Chicago (with T Balboni, E Paulk, A Enzinger, F Munoz, L Rivera, H Prigerson, P Maciejewski).

## **PROFESSIONAL MEMBERSHIPS AND ACTIVITIES**

**Member**, American Sociological Association (Sections on Population, Aging), Population Association of America, Gerontological Society of America, National Council on Family Relations, American Society on Aging

**Editorial Board**, Research on Aging (2013- )

**Editorial Board**, Journal of Aging & Social Policy (2004- )

**Editorial Board**, Journal of Gerontology: Social Sciences (2006-2008)

**Editorial Board**, Demography (1987-1989)

**Ad hoc Reviewer**: American Sociological Review; Canadian Journal of Sociology;

Demography; The Gerontologist; Journal of Aging and Social Policy; Journal of Family

Issues; Journal of Applied Gerontology; Journal of Gerontology: Social Sciences; Journal of Health

and Social Behavior; Population Research and Policy Review; Research on Aging; Social Forces;

Social Psychiatry and Psychiatric Epidemiology; Social Science Quarterly; Social Science Research;

Social Security Bulletin; Sociological Inquiry;

Sociological Perspectives

**Grant Proposal Reviewer**:

- Czech Fulbright Commission, January 2023
- Strategic Science Fund, Government of Canada, Fall 2022
- National Science Foundation-Spring 2018
- Social Security Administration, Retirement and Disability Research Consortia— July 2018-
- Social Security Administration, Retirement Research Consortium—June 2013
- National Institutes of Health, Community Influences on Health Behavior (CIHB) review committee—October 2017

- National Institutes of Health, Social Science and Population Studies (SSPS)- February 2012
- National Institutes of Health, AREA (R15) review committee—July 2012
- National Institutes of Health, Social Sciences, Nursing, Epidemiology and Methods 3 (SNEM-3)- June 2002; October 2002; February 2003
- National Institute of Aging, Behavior and Social Science of Aging review committee (NIA-S)- June 2003; February 2004
- Ageing Well National Science Challenges, New Zealand (April 2019)
- Marsden Fund, Royal Society of New Zealand (July 2005)
- ACR/Sheth Foundation PhD grant panel (August 2020)
- Healthy Aging Canada grant panel, Government of Canada (September 2022) **Member**, Outside Scholars Panel, Retirement and Disability Research Center Consortium annual meeting (2019-current).

**Member**, National Advisory Council on The Longevity Economy. The Economist Intelligence Unit (EIU) of the Economist Group (March, 2019).

**Member**, Emergency Medical Care Advisory Board, Massachusetts Department of Public Health (2018-current)

**Richard Kalish Innovative Publication Award Committee**, Gerontological Society of America; **Chair Elect**, (2012); **Chair** (2013); **Member** (2014).

**GSA Fellowship Committee/BSS Fellowship Committee**, Gerontological Society of America, 2013-2014.

**Member**, Planning Committee, "Living Longer: Aging with Intellectual Disabilities" conference (2013-2014; conference held in Framingham MA 9/18/14).

**Member**, Equity Report Card Advisory Committee, Metropolitan Area Planning Council, Boston (2009-2011; 2017).

**Consultant**, "Population and Health" grant awarded to David Swanson (PI) through the 'Developing Interdisciplinary Working Groups (IWoG)' competition, University of Mississippi (2005-2007).

**Book Reviewer** for the following presses: Mayfield; Wadsworth; State University of New York Press.

**Participant**, Nonrandom Selection in Aging and Retirement Studies, University of Michigan, June 14-18, 1999.

**Co-guest editor**, Research on Aging, special issue on Aging and Disability (2016; with C. Coyle).

**Guest Editor**, International Journal of Sociology and Social Policy, special issue on the Sociology of Aging (1995-1996)

**Item Writer**, GRE Sociology Examination (1993; 1996)

**Organizer and Chair**, 2018 Gerontological Society Association symposium on "Addressing Economic Insecurity in Later Life: Responses and Options." **Co-organizer and Co-Chair**, 2018 Gerontological Society Association symposium on "Building Inclusive Communities: Learning from the World." **Co-Organizer**, 2000 Gerontological Society Association symposium on "Productive Activities and Aging: Conceptual and Methodological Advances" (with J Burr and F Caro).

**Co-Organizer and Discussant**, 2000 Gerontological Society Association symposium on "The Aging

Hispanic Population: Implications for Policy and Practice" (with J. Angel). **Organizer**, 1995 American Sociological Association regular sessions on Aging, and **Chair**, session on "Aging: Health, Well-Being, Identity, and the Aging Process." **Organizer and Chair**, 1991 Population Association of America session on "Demographic Implications of Changing Gender Roles"

**Co-Organizer**, Conference on "Interdisciplinary Perspectives on the Demography of Aging" held at the State University of New York at Buffalo, March, 1990.

**Chair**, 1986 Southern Regional Demographic Group session on "Underemployment and Labor Force Participation"

**Co-organizer**, 1984 American Sociological Association session on "Dissertations in Progress"

**Chair**, 1984 American Sociological Association roundtable on "Occupations" **Discussant**, 1992 Population Association of America session on "Demography and Economics of the Oldest Old"

**Discussant**, Conference on the Future of SIPP, Committee on National Statistics' Panel to Evaluate the Survey of Income and Program Participation, National Research Council, Washington, D.C., April 11-12, 1991

**Invited Member**, Association of Public Data Users, Survey of Income and Program Participation Interest Group (1990-1992)

**Invited Speaker**, Survey of Income and Program Participation Workshop, Annual Meetings of the Population Association of America, Toronto, May 4, 1990. (Sponsored by the U.S. Bureau of the Census.)

**Outside reviewer for promotion cases** at: Pennsylvania State University; University at Buffalo; Purdue University; Syracuse University; University of Toronto; University of Hawaii; Oregon State University; University of Southern California; University at Albany; New York University; University of Texas Medical Branch; University of Maryland Baltimore County (2); University of British Columbia; Hunter College, CUNY.

## **LECTURES AND PRESENTATIONS**

"The true cost of getting older." Webinar for Financial Experts Network. December 13, 2022.

"Financial insecurity in New Jersey: implications for an age-friendly state." Webinar for the New Jersey Age-Friendly State Advisory Council. October 4, 2022.

"Understanding financial insecurity using the Elder index." Panel presentation for Grantmakers in Aging webinar "Financial Well-Being and Income Sufficiency Among Older Americans". September 22, 2022.

"Financial insecurity in later life using the Elder Index." Panel presentation for Chicagoland ASA Round Table. August 5, 2022

"Cumulative inequality across the life course: Disparities in later life financial security". Webinar for Social Science Research Community of Practice, Booz Allen. June 28, 2022.

Keynote for Marshfield Senior Center Open House Celebration. June 25, 2022

"The Elder Index" Webinar for NCOA Learning Lab. April 7, 2022.

"Economic security among older adults in Massachusetts." Webinar, Mass Senior Action. January 21, 2022.

"Program evaluation." Panelist, *Demonstration Grant Planning for Older Workers Remote Employment Training*. Virtual conference, Massachusetts Councils on Aging. September 22, 2021.

"Conceptualizing impact of age-friendly initiatives: Examples from Massachusetts." Panelist, *Measuring Impact*. Webinar hosted by AARP Network of Age-Friendly States and Communities. September 14, 2021.

"Aging Strong for All: Aging equity and housing in the City of Boston." Panelist, *Finding your Way to Home: Options, Choices, Constraints*. Webinar hosted by Community Networks for Aging in Place (CNAP) Alliance. June 7, 2021.

"The Elder Index." Panelist, *Data-informed Policy Reform Through an Aging and Racial Equity Lens, Disrupt Disparities Summit*. Hosted by AARP Illinois, Asian

Americans Advancing Justice Chicago, Chicago Urban League, The Resurrection Project, IL Department of Aging and RRF Foundation for Aging. April 26, 2021.

"The Elder Index for New Jersey." Webinar hosted by the New Jersey Foundation for Aging. October 15, 2020.

"The Elder Index: What it means to your community's older adults." Presentation at the Small and Rural Virtual Conference, MCOA. June 30, 2020.

"The true cost of growing old in America: Implications for states." Webinar hosted by AdVancing States, with Len Fishman and Grace Egan. April 15 2020.

"Promoting better communities for older people: Building economic security using the Elder Index." Webinar hosted by Grantmakers in Aging and Grantmakers in Health, with Irene Frye, Len Fishman and Grace Egan. January 16, 2020.

"The Evolving Needs of Tomorrow's Older Residents." Presentation to the North Shore Elder Services, Danvers MA, November 27, 2018.

"Transportation Concerns among Older Boston Residents." Presentation to the Elder Health Care Disparities Coalition, Roxbury MA, November 15, 2018.

Panelist, Governor's Commission on the Future of Transportation in the Commonwealth listening session: Land Use and Demographic Trends. Boston, MA. June 27, 2018.

"An Introduction to MCOA's Comprehensive Senior Center Database." Workshop at

Southeast CIRCA, June 21, 2018.

"An Introduction to MCOA's Comprehensive Senior Center Database." Workshop at the MA Association of Councils on Aging (MCOA), Fall 2017 conference, October 19, 2017.

"Food Security among Older Boston Residents." Presentation to the Elder Health Care Disparities Coalition, Roxbury MA, October 19 2017.

"Latino Economic Security." Webinar with the National Council on Aging, September 18, 2017.

"Aging in Massachusetts." Presentation to the Lowell Opioid Task Force, Office of Middlesex District Attorney, Lowell, MA, September 8, 2017.

"Economic Security for Massachusetts Elders." Presentation to the Governor's Council to Address Aging in Massachusetts. September 7, 2017.

"Demographic trends and meaningful translations for care." Keynote address, with Len Fishman, at New Jersey Foundation for Aging Translating Trends for Better Care conference, East Windsor, NJ, June 6, 2017.

"Using the Elder Index to gauge elder economic security." Webinar with the National Council on Aging, April 26, 2017.

"Goals for Aging and the Village Movement." Keynote address to Community Networks for Aging in Place workshop, Concord MA, April 22, 2017.

"The Elder Economic Security Standard Index and Late-Life Income Inequality." Presentation to the Elder Health Care Disparities Coalition, Roxbury MA, December 15 2016.

"The 2016 Elder Index for Massachusetts." Workshop at the MA Assoc of Councils on Aging (MCOA), Fall 2016 conference.

"Creating an Age-Friendly Community: Where to start?" Panel presentation at the MA Assoc of Councils on Aging (MCOA), Fall 2016 conference. (with C. Coyle and H Gleason).

"The 2016 Elder Index for Massachusetts." Presentation to the Multicultural Coalition on Aging, October 5, 2016, Boston MA.

"The State of Aging on Cape Cod." Panel presentation to the Cape Cod & Islands Community Health Network #27, Barnstable, MA, May 12, 2016.

"Age-friendly Community Initiatives: Building a Platform for Action." Keynote address, Building Age-Friendly Communities conference, Rhode Island College, Providence RI, April

13, 2016.

"The Age-Friendly Boston Initiative." Presentation to the Design for Aging committee of the Boston Society of Architects. Boston MA, January 19, 2016. "Elder Economic Security." Presentation at hearing convened by the Joint Committee on Elder Affairs, Commonwealth of Massachusetts. Boston MA, October 13, 2015.

"Conducting Community Needs Assessments." Presentation at the Membership meeting of the Massachusetts Association of Councils on Aging, Milford, MA, February 6, 2015.

"Conceptualizing and Measuring Income Security among Older Adults." Presentation at the annual conference of Grantmakers in Aging, San Francisco, CA, October 22, 2014.

"Demographic Tools for Massachusetts Cities and Towns." Presentation at the Massachusetts Gerontology Association Fall Policy Forum, Newton, MA, October 24, 2014.

"Conducting Community Needs Assessments and Planning for the Growing Older Population." Presentation at the annual fall conference of the Massachusetts Association of Councils on Aging, Sturbridge, MA, October 2, 2013 (with B. Steinman).

"Conducting Community Needs Assessments and Planning for the Growing Older Population." Presentation at the annual fall conference of the Mass Home Care Network Conference, Sturbridge MA, September 2013.

"Conducting Community Needs Assessments and Planning for the Growing Older Population." Presentation at the annual fall conference of the Massachusetts Association of Councils on Aging, Falmouth, MA, October 3, 2012 (with C. Coyle and H. Gravette).

"Antecedents and Consequences of Grandparent-Grandchild Coresidence." Presentation sponsored by the Ora M. DeJesus Gerontology Center, University of Massachusetts Dartmouth, December 2, 2011.

"The Demographics of the Veterans Population in Massachusetts." Presentation at Veterans and the Aging U.S. Population colloquium. Newton Senior Center, Newton MA, November 19, 2010.

"Antecedents and Consequences of Grandparent-Grandchild Coresidence: Demographic and Policy Considerations." Charles Nam Lecture, Center for Demography & Population Health and Pepper Institute on Aging and Public Policy, Florida State University, Tallahassee FL, March 25, 2010.

"Elder Economic Security." Presentation at Massachusetts Association of Older Americans, Inc., 40<sup>th</sup> Anniversary Celebration. Boston, MA, September 24, 2009.

"The Demographics of the Veterans Population in Massachusetts." Presentation at Veterans and the Aging U.S. Population: Problems and Policies conference. University of Massachusetts Boston, MA, August 13, 2009.

"The Impact of Economic and Social Forces on Seniors in the Next Five Years."

Keynote address for the Models for Successful Aging conference, hosted by Kit Clark Senior Services. Federal Reserve, Boston MA, June 4, 2009.

"An Introduction to the Elder Economic Security Standard Index." Presentation to the National Reverse Mortgage Lenders Association, Cambridge, MA, March 1819, 2009.

"Economic Security: A Frame to Guide Program and Policy Development." Participant in a panel presentation to the National Association of State Units on Aging, Boston, MA, September 27, 2008.

"Grandparents Parenting Grandchildren." Invited presentation to the South Shore Coalition of Workers with the Elderly, Braintree MA, October 2007.

"Language Barriers Surrounding Medication Use among Older Latinos." Speaker series, Rosalie Wolf Geriatric Center, University of Massachusetts Medical School at Worcester, Spring 2007.

"Trust, communication, and language in the patient-physician relationship in later life." Speaker series, Gerontology Institute and Department, University of Massachusetts Boston, Fall 2006.

"The Demography of Disability and the Effects of Immigrant History: Older Asians in the United States." Speaker series on mentoring, Public Policy PhD Program, University of Massachusetts Boston, Fall 2006 (with A. Prakash).

"Seniors in Family Housing." Speaker series, Gerontology Institute and Department, University of Massachusetts Boston, Spring 2003.

"Kinship Care in Massachusetts." Conference on Lifespan Perspectives on Kinship Care, School of Social Work, Salem State College, Spring 2003.

"English language skills, ethnic communities, and household composition among older Mexican immigrants." Speaker series, Gerontology Institute and Center, University of Massachusetts Boston, Spring 2002.

"English Language Proficiency among Older Hispanics: Patterns and Implications." Speaker series, Gerontology Institute and Center, University of Massachusetts Boston, Spring 1999.

"Child Poverty and Intergenerational Coresidence." Speaker series, Center for Policy Research, Maxwell School of Citizenship and Public Affairs, Syracuse University, Fall 1998.

"Black-White Health Differentials in Later Life." Speaker series, Department of Health and Preventive Medicine, SUNY-Buffalo, Fall 1992.

"The Social Implications of Gender Ratios in the U.S.," Parents/Homecoming Weekend, SUNY-Buffalo, Fall 1991.

"The American Family." Preacademic Orientation for Fulbright Scholars, SUNY- Buffalo, Summer 1991.

## **UNIVERSITY SERVICE**

### **University of Massachusetts Boston:**

**Co-chair**, Research Design and Analysis Core, UMass Boston/Dana Farber Harvard Cancer Center U54 Partnership. 9/2022- .

**Member**, Executive Committee of the Institutes and Centers Council, 2020- .

**Vice Chair**, Executive Committee of the Institutes and Centers Council, 2022- .

**Chair**, Chancellor's Distinguished Service Award Committee, 2017.

**Member**, Research Committee of the Faculty Council, 2019-2021.

**Member**, University Discipline and Grievance Committee, 2015-2018

**Member**, Committee to establish a Transdisciplinary Research Institute for Behavioral and Social Sciences, 2016-2017.

**Member**, search committee, Program in Social Work, Spring 2017.

**Member**, Enhanced Graduate Assistantship Award committee, Spring 2012.

**Member**, Dissertation Support proposal review committee, Spring 2000; Spring 2010, Spring 2011.

**Member**, Chancellor's Distinguished service award committee, 2015.

**Member**, Faculty Council, Fall 2003-Spring 2008

**Member**, Personnel Committee, McCormack Graduate School of Policy Studies, 2004-2006; 2011-2012; 2012-2013.

**Member**, Ad hoc departmental personnel review committee, College of Liberal Arts, Fall 2020.

**Member**, Ad hoc departmental personnel review committee, College of Nursing and Health Sciences, 2011-2013; Fall 2020; Fall 2021.

**Member**, Ad hoc departmental personnel review committee, Fall Honors College, 2020.

**Member**, Ad hoc departmental personnel review committee, College of Liberal Arts, 2016-2017.

**Member**, Ad hoc departmental personnel review committee, College of Education and Human Development, 2011-2012.

**Member**, Ad hoc college personnel review committee, College of Management, Spring-



summer 2015.

**Member**, Ad hoc departmental personnel review committee, School for Global Inclusion and Social Development, 2014.

**Member**, Ad hoc departmental personnel review committees, Department of Public Policy and Public Administration, 2014-2015; 2015-2016; 2016-2017.

**Member**, review committee for Distinguished Research Professorship, Spring 2006.

**Member**, Strategic Planning Task Force Committee on Research and Graduate Studies, 2006-2007.

**Member**, Curriculum Committee, McCormack Graduate School of Policy Studies, 2006-2007.

**Member**, Academic Computer Oversight committee of the Faculty Council, 2007-2010.

**Member**, University Research Committee (convened by R. Antonak, Vice Provost for Research, and S. Crosby, Dean of McCormack Graduate School), 2007-2009. **Member**, University Research Advisory Council (convened by Z Xia, Vice Provost for Research), 2012-2014.

**Member, faculty** search committee for the Department of Public Policy and Public Affairs, 2007-2008.

**Member**, Public Service Grant review panel (internal grant competition), 2018 **Member**, Healey review panel (internal grant competition), 2007-2008 **Chair**, Healey review panel (internal grant competition), 2008-2009; 2015-2016 **Member**, Population Science and Outreach Research Internal Advisory Committee of the U54 Cancer Research Partnership (UMB-DF/HCC), 2010-2011. **Member**, Population & Clinical Science/Outreach IAC Subcommittee, U56 Collaborative Grant between University of Massachusetts Boston & Dana Farber Cancer Center, 2007-2010.

**Member**, Computation Sciences workgroup, 2007-2008.

**Member**, Strategic Planning Workgroup, McCormack Graduate School of Policy Studies, 2008-2009.

**Member**, Policy Board, College of Public and Community Service, 2000-2002.

**Member**, Public Policy Teaching and Curriculum Group, University of Massachusetts system, 2003.

#### **University at Buffalo:**

**Member**, Graduate Group in Demography (1992-1998), **Acting Director** (1992-93), **Co-Director** (1993-94), Graduate Group in Demography

**Member**, Founders' Committee for the College of Arts and Sciences, Office of the Provost. 1997-1998.

**Member**, Academic Standards Committee, Office of the Vice Provost for Undergraduate Education. 1998.

**Member**, Review Panel for the Canada United States Trade Center (CUSTAC),

Office of the Vice President for Research. Spring 1998.

**Member and statistical consultant**, "Evaluating School and School District Effect and

Efficiency." Research project funded by UB Office for Public Service and Urban Affairs. A. Swanson and F. Engert, co-PIs, Graduate School of Education. 1997-1998.

**Member**, Personnel Committee, Faculty of Social Sciences. 1995-1997.

**Member**, Faculty Senate Committee on Educational Programs and Policies. 1994-1997;

**Chair**, Subcommittee on Internships.

**Member**, Graduate Groups Advisory Panel, SUNY-Buffalo. 1993-1995.

**Member**, Review Committee for Conferences in the Discipline, SUNY-Buffalo. Spring 1994.

**Member**, Committee on Degree Requirements, SUNY-Buffalo. 1992-1994.

**Member**, Task Force on University Assessment, SUNY-Buffalo. 1991-1993.

**Member**, Learning Center Advisory Committee, SUNY-Buffalo. 1992-1993. **Assistant Marshal**, University Commencement, SUNY-Buffalo. 1992-1994.

**Faculty Facilitator**, Teaching Assistant Workshop, SUNY-Buffalo. Summer 1992.

**Member**, Ad hoc committee on proposed statistics general education requirement, SUNY-Buffalo. Spring 1991.

**Member**, Ad hoc Undergraduate College committee on Undergraduate Assessment. Spring 1991.

**Member**, Biomedical Research Support Grants (BRSRG) Committee, Faculty of Social Sciences, State University of New York at Buffalo. 1989, 1990.

**Member**, Interdisciplinary Task Force on Poverty and the Underclass, Center for Applied Public Affairs Studies, State University of New York at Buffalo, 1989-1990.

**Invited Speaker**, Grant Writing Workshop for Graduate Students, State University of New York at Buffalo, April, 1990.

**Member**, Graduate Faculty, State University of New York at Buffalo. 1988-1998.

#### **Pennsylvania State University:**

**Member**, Women's Studies Advisory Committee, The Pennsylvania State University. 1985-1987.

**Member**, Gerontology Center Advisory Committee, The Pennsylvania State University. 1986-1988.

#### **DEPARTMENTAL SERVICE**

##### **University at Massachusetts Boston:**

**Member**, Ad hoc Strategic Planning committee for Gerontology (2014-2015; 2018-2020).

**Chair**, Ad hoc committee for the Gerontology Department on the Undergraduate Gerontology program (2014-2015).

**Member**, Personnel Committee, Gerontology Department (2011-2012; 2015-2016; 2016-2017); (2017-2018; 2018-2019; 2019-2020; 2020-2021).

**Member** (2013-2014; 2014-2015; 2019-2020) and **Chair** (2011-2012; 2014-2015; 2017-2018; 2019-2020; 2020-2021; 2021-2022), Ad-hoc Personnel Review Committees, Gerontology Department.

**Member**, Executive Committee of the Gerontology Institute (2001-2010).

**Member**, Graduate Admissions Committee, Gerontology Department (2004-2013)  
**Member**, Curriculum Committee, Gerontology Department (2003-2004) (2005-2012)  
**Reader**, 2<sup>nd</sup> year Papers and Qualifying exams, Gerontology PhD Program (1999-current)  
**Member**, Morris Dissertation Support Grant review committee (Fall 2006) (Fall 2014)  
**Chair**, Search Committee for Director of Gerontology Institute (2004-2005) (2013-2014)  
**Member** (2014-2015; 2015-2016; 2018-2019) and co-Chair (2021-2022) faculty search committees.  
**Member**, staff search committees (2015-2016).  
**Member**, Staff and Budget Committees of the Gerontology Institute (1999-2006)  
**Member**, ad-hoc space committee, Gerontology Institute and Department (2003-2004)  
**Coordinator**, Gerontology Speaker Series, 2003-2004.  
**Member**, sub-committee on policy curriculum in Gerontology PhD program (1999)  
**Member**, committee on computing for research and training, Gerontology PhD program (1999)  
**Guest speaker**, undergraduate Sociological Aspects of Aging distance learning course (Marian Spencer, instructor) (1999)

#### **University at Buffalo:**

**Speaker**, Sociology Commencement (1996; 1998)  
**Director of Undergraduate Studies** (1991-1994)  
**Faculty Advisor**, Undergraduate Sociology Association (1992-1994)  
**Recruitment Committee** (1986-1987; 1987-1988; 1989-1990; 1990-1991; 1991-1992; 1993; 1994-1995) **Recruitment Chair** (1992-1993)  
**Executive Committee** (1991-1992)  
**Personnel Committee** (1994-1998)  
**Graduate Committee** (1996-1998)  
**Work-Family Ad Hoc Committee** (1991-1992)  
**Undergraduate Committee** (1991-1994)  
**Preliminary Examination Committees:** Methods/Statistics; Sociology of Aging; Gender; Stratification; Demography

#### **COURSES TAUGHT**

##### Undergraduate:

Introduction to Sociology  
Social Problems  
Sociology of the Family  
Medical Sociology Work and Family Population Problems Statistics for Social Sciences Population Dynamics in an Aging World (Honors seminar)

##### Graduate:

Seminar in Work and Family  
Seminar in Social Demography

Seminar in Family Demography  
Seminar in Sociology of Aging  
Seminar in Diversity in Aging Demographic Methods in Aging Professional  
Development Seminar