Brooke Helppie-McFall

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EDUCATION

Ph.D., Economics, University of Michigan (2011).

M.A., Economics, University of Michigan (2007).

B.A., Economics (Honors), University of California at Davis (2002).

RESEARCH INTERESTS

Labor and Demographic Economics, Economics of Aging, Survey Methodology

RESEARCH POSITIONS

Assistant Research Scientist, Survey Research Center, Institute for Social Research, University of Michigan. August 2011-present.

> *Project management activities:* Work with all aspects of scientific surveys in multiple and mixed modes, including sampling, study and survey design, management of fielding team, management of data cleaning and preparation for data release and analysis, weighting, analysis, human subjects protections, linkage of survey and administrative data, management of data entry team and data analysts. Study content has included financial decisionmaking, financial and health literacy, cognitive ability, health, well-being, employment and location decisionmaking, work preferences, work-life balance. Survey project roles include:

- Scientific manager of Cognitive Economics Survey (2008-present);
- Co-founder and co-investigator of Survey of Job Seekers in Economics and Related Fields (2007-present);
- U-M Primary Investigator of Cognition and Aging in the USA Study (2015-present);
- Health and Retirement Study biennial core survey module manager (2016-present);
- Life History Mail Survey key personnel and team manager (2017-present);
- Co-investigator, Life History Mail Survey Supplement (2017-present).

Research Assistant with Cognitive Economics Study (PI: Willis), Survey Research Center, Institute for Social Research, University of Michigan. January 2008 - July 2011.

Research Assistant to Katherine Terrell, University of Michigan, May 2007 - May 2009

Research Consultant, DECRG, World Bank, Washington, DC, June 2006 - January 2007

Summer Research Intern, Cape Town, South Africa, Summer 2005

Special Project Researcher, Sacramento Central Labor Council, Winter 2003

Public Policy Research Fellow, AFL-CIO, November 2002 - November 2003

Research Intern, Economic Policy Institute, Washington, DC, Winter 2002

PUBLICATIONS

Helppie-McFall, Brooke and Joanne W. Hsu. "A test of web and mail mode effects in a financially sensitive survey of older Americans." *Journal of Economic and Social Measurement*, 42, 151-169. 2017.

Sonnega, Amanda, Brooke Helppie-McFall, Robert J. Willis, Peter Hudomiet, and Gwenith G. Fisher. "A comparison of subjective and objective job demands and fit with personal resources as predictors of retirement timing in a national U.S. sample." *Work, Aging, & Retirement*, 4:1, 37-51. 2017.

Gideon, Michael, Brooke Helppie-McFall, and Joanne W. Hsu. "Heaping at round numbers on financial questions: The role of satisficing?" *Survey Research Methods,* 11:2, 189-214. 2017.

McFall, Brooke Helppie, and Marta Murray-Close. "Moving out to move up: Dual-career migration and work-family tradeoffs." *Economic Inquiry*. January 2016. (With Marta Murray-Close.)

McFall, Brooke Helppie, Marta Murray-Close, Robert J. Willis and Uniko Chen. "Is it all worth it? The experiences of new PhDs on the job market, 2007-2010." *Journal of Economic Education*, 46:1, 83-104. February 2015.

McFall, Brooke Helppie. "Crash and wait? The impact of the Great Recession on the retirement plans of older Americans." *American Economic Review: Papers and Proceedings* 101. May 2011.

Helppie, Brooke and Mario Macis. "The impact of non-wage benefits on job quality and labor market outcomes in the developing world: What do we know?" *World Bank Employment Policy Primer*. December 2009. No. 13.

Boeri, Tito, Brooke Helppie-McFall and Mario Macis. "Labor regulations in developing countries: A review of the literature and directions for future research." *World Bank Social Protection Discussion Paper No. 0833*. October 2008.

Weller, Christian, and Brooke Helppie. "Did the stock market boom of the late 1990s impede investment in manufacturing?" *Journal of Economics and Finance.* Fall 2005.

WORKING PAPERS AND RESEARCH IN PROGRESS

Helppie-McFall, Brooke, and Amanda Sonnega. "Characteristics of second career occupations: A review and synthesis." Michigan Retirement Research Center Working Paper (forthcoming).

Helppie-McFall, Brooke, Joanne W. Hsu and Matthew D. Shapiro. "The impact of hypothetical wealth shocks on retirement timing."

Helppie-McFall, Brooke, Amanda Sonnega, Robert J. Willis and Peter Hudomiet. "Occupations and work characteristics: Effects on retirement expectations and timing." Michigan Retirement Research Center Working Paper 2015-331.

Helppie-McFall, Brooke, and Ryan McCammon. "The CogUSA mode experiment."

Helppie-McFall, Brooke, Marta Murray-Close, and Robert J. Willis. "The experiences of international students on the United States primary job market for new PhDs, 2007-2010."

Helppie, Brooke, Kandice Kapinos, and Robert J. Willis. "Occupational spillovers, financial knowledge and wealth accumulation." http://www.mrrc.isr.umich.edu/publications/papers/pdf/wp237.pdf

PRESENTATIONS

"The impact of hypothetical wealth shocks on retirement timing." Presented at the Annual Meeting of the National Tax Association in November 2017; Presented at the Michigan Retirement Research Center Workshop, April 2014; Presented at the *Midwest Economics Association* Annual Meeting, March 2014.

"Occupations, cognitive decline and retirement." Presented at the *Gerontological Society of America* Annual Meeting in November 2016.

"Job characteristics and retirement using the HRS and O*Net." Invited presentation at the *Social Security Administration* in November 2016.

"Occupations and work characteristics: Effects on retirement expectations and timing." Presented at the *Retirement Research Consortium* Annual Meeting, Washington DC in August 2015.

"Occupational changes in the HRS." Presented at the *Michigan Retirement Research Center Workshop*, April 2015.

"Mode experiments in mixed-mode surveys: Insight from the Cognitive Economics Study." Presented at the Annual Conference of the *American Association for Public Opinion Research* in May 2014.

"The Great Recession and the Retirement Plans of Older Americans." Presented at the *Population Association of America* Annual Meeting, May 2012.

"Mode effects in mixed-mode surveys: Insight from the Cognitive Economics Study." Presented at the Conference on *Internet Interviewing and the Health Retirement Study*, September 2011.

"Crash and wait? The Great Recession and the expected retirement age of older Americans." Presented at the *American Economic Association* Annual Meeting, January 2011.

"Moving out, moving up? New economists sacrifice job opportunities for proximity to significant others—and vice versa." Presented at the *American Economic Association* Annual Meeting, January 2010.

"Couple co-location constraints, job market outcomes, and migration decisions among new doctoral-level economists." Presented at the *Population Association of America* Annual Meeting, May 2009.

"Why don't firms take advantage of more flexible labor options? Regulation, enforcement and corruption." (with Mary Hallward-Driemeier) Presented at *Labor Markets in Transition and Developing Countries*: Emerging Policy and Analytical Issues, May 2007.

PUBLISHED DATA AND DOCUMENTATION REPORTS

"Cognitive Economics Study, 2013 Public Core (Version 1.0) public use dataset." Produced and distributed by the University of Michigan with funding from the National Institute on Aging (grant number NIA P01 AG026571), Ann Arbor, MI. 2014. Link.

"Cognitive Economics Study: CogEcon 2013 Documentation." Version 1.0, July 2014. (With Michael Gideon, Seth Koch and Feiya Shao.) Link.

"Cognitive Economics Study, 2011 Public Core (Version 1.1) public use dataset." Produced and distributed by the University of Michigan with funding from the National Institute on Aging (grant number NIA P01 AG026571), Ann Arbor, MI. 2013. Link.

"Cognitive Economics Study: CogEcon 2011 Documentation." Version 1.1, May 2015. (With Michael Gideon and Seth Koch.) Link.

"Cognitive Economics Study, CogEcon Public Core Release (Version 1.0) public use dataset." Produced and distributed by the University of Michigan with funding from the National Institute on Aging (grant number NIA P01 AG026571), Ann Arbor, MI. 2013. Link.

"Cognitive Economics Study: Development and Methodology." Version 1, November 2011. (With Gwen Fisher, Mike Gideon, and Joanne W. Hsu.) Link.

"Cognitive Economics Study: Data Description." Version 1, January 2012. (With Gwen Fisher, Mike Gideon and Joanne W. Hsu.) Link.

GRANTS

University of Michigan Retirement Research Center, Social Security Administration. (PI: Laitner), Subproject UM18-06, "Validity and Reliability of Machine Coding of Occupation & Industry in the Health and Retirement Study." (Project PI: Helppie-McFall; with Amanda Sonnega), 2017-18.

National Institute on Aging, National Institutes of Health. (PI: Smith), Enhancing Retrospective Life History Data in the Health and Retirement Study: Administrative Supplement, 2017-18.

University of Michigan Retirement Research Center, Social Security Administration. (PI: Laitner), Subproject UM17 Quick-Turnaround Project, "Characteristics of second career occupations: A review and synthesis." (Project PI: Helppie-McFall; with Amanda Sonnega), 2017.

University of Michigan Retirement Research Center, Social Security Administration. (PI: Laitner), Subproject UM16-03, "Occupational Transitions Among Older Workers," (Project PI: Sonnega; with Amanda Sonnega and Robert J. Willis), 2015-16.

University of Michigan Retirement Research Center, Social Security Administration. (PI: Laitner), Subproject UM16-10, "Issue Brief: Occupational Differences in Rates of Cognitive Decline," (Project PI: McFall; with Amanda Sonnega), 2015-16.

University of Michigan Retirement Research Center, Social Security Administration. (PI: Laitner), Subproject UM15-01, "Changing Work Demands and Compositional Changes in Occupations: Effects on Expected Retirement," (Project PI: Willis; with Amanda Sonnega and Robert J. Willis), 2014-15.

Alfred P. Sloan Foundation, Scientific and Engineering Workforce Program Grant, "A Longitudinal Study of the Professional Accomplishments and Personal Lives of Early-Career Scientists" (Project PI: Willis; with Robert J. Willis and Marta Murray-Close), 2010-2011.

University of Michigan Retirement Research Center, Social Security Administration 10-M-98362-5 (PI: Laitner), Subproject UM10-08, "Cognitive Function and Financial Knowledge: A Human Capital Approach," (Project PI: Willis; with Robert J. Willis and Kandice Kapinos), 2009-2010.

Population Studies Center Small Grant, 2011. (PI: Murray-Close)

Regula A. Herzog Young Investigator's Fund Award, 2009-2010.

Rackham Graduate Student Research Grant, 2009-2010.

TEACHING EXPERIENCE

Lecturer, Global Economy, Stephen M. Ross School of Business, University of Michigan (Winter 2018)

Primary Instructor, Principles of Microeconomics, Department of Economics, University of Michigan (Spring 2007)

Teaching Assistant, Department of Economics, University of Michigan,
  Principles of Microeconomics, for Janet Gerson (September 2005 - April 2007)
  Principles of Macroeconomics, for David Spencer (September - December 2007)

FELLOWSHIPS AND AWARDS

Summer Research Assistantship, Department of Economics, University of Michigan (2005)

Recipient, Rackham Regents Fellowship, University of Michigan (2004-2005)

Recipient, Departmental Citation for Outstanding Achievement in Economics, UC Davis (Spring 2002)

Recipient, Regents Scholarship, University of California- Davis (Fall 1998-Spring 2002)

Member, Phi Beta Kappa Society

REFEREE ACTIVITIES

Journal of Labor Economics, Journal of Pension Economics and Finance, International Review of Economic Education

SERVICE

Member, Director's Advisory Committee on Diversity, October 2016-present