

Brooke Helppie-McFall

Survey Research Center
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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 and job characteristics. 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 (2015-2018);
- Health and Retirement Study biennial core survey module manager (2016-2018) and web survey monitoring (2018-2019)
- Life History Mail Survey key personnel and team manager (2017-present);
- Co-investigator, Life History Mail Survey Supplement (2017-2019);
- Co-investigator, Linked Employer-Employee Survey (2018);
- Co-Investigator, Use it or lose it (2020-2024).

PUBLICATIONS

Helppie-McFall, Brooke and Joanne W. Hsu. "Financial profiles of workers most vulnerable to coronavirus-related earnings loss in the spring of 2020." *Financial Planning Review*, 3:1, e1102, 1-10. 2020.

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.

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

Helppie-McFall, Brooke and Amanda Sonnega. 2018. "Feasibility and reliability of automated coding of occupation in the Health and Retirement Study." Ann Arbor MI: University of Michigan Retirement Research Center (MRRC) Working Paper, WP 2018-392. [Link](#).

Helppie-McFall, Brooke, and Amanda Sonnega. "Characteristics of second career occupations: A review and synthesis." Michigan Retirement Research Center Working Paper 2017-375. [Link](#).

Helppie-McFall, Brooke, Joanne W. Hsu and Matthew D. Shapiro. "The impact of hypothetical wealth shocks on retirement timing." [Link](#).

Sonnega, Amanda, Brooke Helppie-McFall and Robert J. Willis. "Occupational transitions at older ages: What moves are people making?" Michigan Retirement Research Center Working Paper 2016-352. [Link](#).

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. [Link](#).

Helppie, Brooke, Kandice Kapinos, and Robert J. Willis. "Occupational spillovers, financial knowledge and wealth accumulation." [Link](#).

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.

RESEARCH IN PROGRESS

Fisher, Gwenith, Gretchen A. Petery, Dorey S. Chaffee, Brooke Helppie-McFall and Amanda Sonnega. "Swimming in a sea of uncertainty: Labor force implications of the COVID-19 pandemic." *Under review*.

Smith, Jacqui, Brooke Helppie-McFall, Amanda Sonnega, Mary Beth Ofstedal, and David Weir “Data Resource Profile: Retrospective Life Histories of Participants in the U.S Health and Retirement Study (HRS).”

Helppie-McFall, Brooke, Joanne Hsu, and Amanda Sonnega. “Racial and ethnic disparities in COVID risk related to occupational characteristics.”

Helppie-McFall, Brooke and Amanda Sonnega. “The relationship between stress over the life course and later-life disability and retirement.”

Helppie-McFall, Brooke, Amanda Sonnega and Haena Lee. “The relationship between stress over the life course and later-life cognitive functioning.”

PUBLISHED DATA AND DOCUMENTATION REPORTS

“2017 Fall Life History Mail Survey public use dataset” (Version 1.0.) Produced and distributed by the University of Michigan with support from the Health and Retirement Study (grant number NIA U01 AG009740) and NIA R01 AG051142. Ann Arbor, MI. 2020. [Link](#).

“2017 Spring Life History Mail Survey public use dataset” (Version 2.0.) Produced and distributed by the University of Michigan with support from the Health and Retirement Study (grant number NIA U01 AG009740) and NIA R01 AG051142. Ann Arbor, MI. 2019. [Link](#).

“Cognitive Economics Study, 2017 Public Core (Version 1.0) public use dataset.” Produced and distributed by the University of Michigan with support from the Health and Retirement Study (grant number NIA U01 AG009740) and the NSF-Census Research Network (grant number SES 1131500). Ann Arbor, MI. 2014. [Link](#).

“Cognitive Economics Study: CogEcon 2017 Documentation.” Version 1.0, February 2019. (With Taylor Slayton and Yuci Zhou.) [Link](#).

“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

Michigan Retirement and Disability Research Center, Social Security Administration. (PI: Sonnega). “The Relationship between Adverse Experiences over the Life Course and Later-life Retirement due to Disability,” (Role: Co-Investigator), 2020-21.

National Institute on Aging, National Institutes of Health. (PI: Kezdi). “Assessing the interactive effect of lifetime and old age cognitive engagement on cognitive decline and dementia: cognitive reserve versus use it or lose it,” (Role: Co-Investigator), 2020-2025.

National Institute on Aging, National Institutes of Health. (PI: Smith). “Enhancing Retrospective Life History Data in the Health and Retirement Study - Renewal,” (Role: Co-Investigator), 2019-24.

Michigan Retirement and Disability Research Center, Social Security Administration. (PI: Sonnega). “Building Data Resources for Studying Effects of Occupational Characteristics on Health, Disability, and Retirement,” (Role: Co-Investigator), 2019-20.

Retirement and Disability Research Consortium at the Center for Financial Security, University of Wisconsin-Madison, Social Security Administration. “Incentives for Home and Community Based Care Under the Affordable Care Act: Implications for Supplemental Security Income Receipt.” (UM-PI/Consortium PI: Helppie-McFall), 2018-19.

National Institute on Aging, National Institutes of Health. (PI: Smith). “Enhancing Retrospective Life History Data in the Health and Retirement Study: Alzheimer’s Administrative Supplement,” 2018-19.

Alfred P. Sloan Foundation. (PI: Hudomiet), “Labor Demand Aspects of Working Longer - A Pilot Study using an Employer-Employee Survey in the ALP.” (UM PI: Helppie-McFall), 2018.

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: Helppie-McFall; with Amanda Sonnega), 2015-16.

Michigan Institute for Teaching and Research in Economics (MITRE). Research Awards to cover expenses for research assistant for Cognitive Economics project, 2014, 2015; research assistant for

Cognitive Economics 2017 administrative data linkage project, 2018; research assistant for occupations research, 2018.

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.

PRESENTATIONS, WEBINARS AND WORKSHOPS

"Webinar on the Economics Ph.D. Job Market." Co-organized virtual webinar attended by more than 700 unique attendees in September 2020. Recording viewed hundreds of additional times. [Link](#).

"Building Data Resources for Studying Effects of Occupational Characteristics on Health, Disability, and Retirement Workshop." Co-organized and moderated virtual half-day workshop in August 2020.

"The relationship between stress over the life course and later-life cognitive functioning." Presented at the Annual Meeting of the Gerontological Society of America in Boston, MA, in November 2018.

"The relationship between stress over the life course and later-life disability and retirement." Presented at the Annual Meeting of the Society for Longitudinal and Lifecourse Studies in Milan, Italy, in July 2018.

"Work after Social Security retirement claiming." Presented at the Annual Meeting of the Western Economic Association International in Vancouver, Canada, in June 2018.

"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; Earlier version 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." Invited presentation at the *Retirement Research Consortium Annual Meeting*, Washington DC in August 2015.

“Eliciting financial information on surveys: the tradeoff between precision and nonresponse.” Presented at the *American Association for Public Opinion Research* Annual Meeting, Fort Lauderdale, FL in May 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.

TEACHING EXPERIENCE

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

American Economic Journal: Economic Policy; Journal of Labor Economics; Journal of Pension Economics and Finance; International Review of Economic Education; PLOS ONE; Review of Economics of the Household; Work, Aging and Retirement; Feminist Economics; Economic Inquiry; Field Methods

SERVICE

Member, SRC COVID Faculty Taskforce, March 2021-present

Member, American Economic Association Ad Hoc Committee on the Job Market, May 2020-present

Member, Director's Advisory Committee on Diversity, October 2016-September 2019

Member, Survey Research Center Research Dissemination Committee, January 2018-present