

**Terry Y. Lum**  
**Curriculum Vitae**

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**PROFESSIONAL EXPERIENCE**

- 2011 – pres Associate Professor, Department of Social Work and Social Administration, the University of Hong Kong.
- 2011 – pres Director, Sau Po Center on Ageing, The University of Hong Kong.
- 2005 – 2011 Associate Professor, School of Social Work, University of Minnesota.
- 2009 Interim Director of Graduate Studies, School of Social Work, University of Minnesota.
- 2008 Interim Director of Doctoral Program, School of Social Work, University of Minnesota.
- 2007 – 2008 Visiting Associate Professor, Department of Social Work and Social Administration, The University of Hong Kong.
- 1999 – 2005 Assistant Professor, School of Social Work, University of Minnesota.
- 1998 – 1999 Urban Analyst, East-West Gateway Coordinating Council, St. Louis, Missouri.
- 1989 – 1993 Social worker, Social Welfare Department, Hong Kong.
- 1988 – 1989 Assistant Accountant, American International Assurance, Hong Kong.N

**EDUCATION**

- Ph.D. George Warren Brown School of Social Work, Washington University in St. Louis. Received May, 1998.
- M.S.W. Department of Social Work and Social Administration, University of Hong Kong, Hong Kong. Received November 1993.
- B.Soc.Sc. Department of Economics, University of Hong Kong, Hong Kong. Received November 1988.

**HONOR**

Services to the Profession (Social Work and Gerontology):

- 2011 Elected Fellow, The Gerontological Society of America
- 2009 - pres Co-convener of the Chinese Gerontological Studies Interest Group, the Gerontology Society of America.
- 2010- 2012 Member of the Executive Committee of the Social Research, Policy and Practice Section of the Gerontological Society of America.
- 2010-2012 Member of the Information Technology Committee of the Gerontology Society of America.
- 2010 - 2011 Member of the National Program Advisory Committee of the Hartford Geriatric Social Work Doctoral Fellows Program.
- 2010 Selection committee, Society for Social Work and Research Doctoral Dissertation Fellow Award.
- 2008 Wenchun Task Force, Appointed by the Beijing Normal University and the

- Chinese Government.
- 2005-2007 Member of the Executive Committee of the Social Research, Policy and Practice Section of the Gerontological Society of America.
- 2005-2007 Member of the Information Technology Committee of the Gerontology Society of America.
- 2002-2006. Member of the National Advisory Committee of the Institute for Geriatric Social Work of Boston University School of Social Work
- 2004 Member of the National Advisory Council of the Robert Wood Johnson Foundation's Cash & Counseling Program.

#### Awards

- 2010 60th Anniversary Distinguished Alumni Award. Department of Social Work and Social Administration, The University of Hong Kong.
- 2001-2003 The John A. Hartford Foundation Geriatric Social Work Faculty Scholar.
- 2002 The Marie Wasie Elder Life Enhancement Award, a statewide award by the Little Brothers Friends of the Elderly of Minnesota.
- 1991 & 1992 Hong Kong Bank Scholarships, Department of Social Work and Social Administration, The University of Hong Kong.

#### Honorary appointments:

- 2005 – 2011 Fellow, Sau Po Center on Aging, The University of Hong Kong.
- 2006 - pres Fellow, Center for Behavioral Health, Faculty of Social Sciences, The University of Hong Kong.
- 2000 – 2010. Honorary faculty, Department of Social Work and Social Administration, The University of Hong Kong, Hong Kong.

#### **SPONSORED RESEARCH PROJECTS**

- 2011-2012 Principle Investigator. Promoting Aging-in-Place for Elderly Tenants in Rental Estates of Hong Kong Housing Society. Funded by the Hong Kong Housing Society for HK\$500,000. (Co-Is: Dr. Ernest Chui & Dr. Vivian Lou).
- 2011 Co-Principle Investigator. Shared Responsibility in Elder Care. Funded by the Yan Oi Tong for HK\$297,700. (Co-Is: Dr. Ernest Chui & Dr. Vivian Lou).
- 2009-2011 Principle Investigator. Mental Health Assessment and Screening Instruments for Southeast Asian Populations. Funded by the U.S. Department of Agriculture's Agriculture Experimental Station Research Grant. Funded amount: US\$100,000.
- 2007 – 2008 Co-Principal Investigator. Trends in Family Attitudes and Values in Hong Kong. Funded by the Government of Hong Kong Special Administrative Region, China. Funded amount: US\$ 32,736 (with Professor Nelson Chow).
- 2006 - 2007 Co-Principal Investigator. The CADENZA Project. The CADENZA project was

funded by a 39 million donation from the Hong Kong Jockey Club. Total grant to the University of Minnesota: US \$209,111 (Co-PIs: Professors Ada Miu of Columbia University and Jean Woo of the Chinese University of Hong Kong).

- 2003 - 2009. Principle Investigator. Mental health needs and services utilization of Southeast Asians in Minnesota.” Funded by the Department of Agriculture's Agriculture Experiment Station research grant at the University of Minnesota. Six year total budget about US\$130,000.
- 2006 Co-Investigator. Full-Scale Implementation and Sustainability of Small Group Nursing Homes in Tupelo, MS: Lessons for Replication. With Rosalie Kane. Grant from the Commonwealth for US\$29,985.
- 2004 - 2007 Co-Investigator. Research of program and techniques taken by states to rebalance their long term care system. With Rosalie Kane. Research contract funded by the Center for Medicare and Medicaid Services. Funded amount: US\$2,018,246.
- 2003 - 2005. Co-Investigator. Feasibility of Small Group Nursing Homes: Lessons from Tupelo, Mississippi. With Dr. Rosalie Kane. Funded by the Commonwealth Fund for US\$295,330.
- 2002 - 2003 Co-Principal Investor. Informal kinship care in Minnesota: A pilot study. Funded by the Minnesota Kinship Caregivers Association for US \$50,000 (Co-PI: Professor Priscilla Gibson, the University of Minnesota).
- 2001 - 2003 Principal Investigator. Patterns of Nursing Home Use and Outcomes in Minnesota. Funded by the Hartford Foundation for US\$100,000.

### **COMPETITIVE UNIVERSITY GRANTS**

- 2010-2011 Co-PI. Minnesota Social Work Institute on Community Based Participatory Research and Education. Funded by the University of Minnesota Engaged Department Grant for \$9,970 (Co-PI Professor Elizabeth Lightfoot, University of Minnesota).
- 2009 – 2011 Principal Investigator. Comparative studies of families in Chinese Society. Funded by the Grant-In-Aid of Research, Artistry and Scholarship at the University of Minnesota for \$13,188.
- 2008 International Travel Grant for a trip to earthquake disaster areas in China, International Office of the University of Minnesota: Grant total: \$1,500.
- 2002 - 2003 Principle Investigator. Nongovernmental Organizations and Development Of Social Welfare In China.” Funded by the Grant-In-Aid of Research, Artistry and Scholarship at the University of Minnesota for \$17,097.

2000 - 2001 Principal Investigator. Family caregiving among elderly people: racial and ethnic differences.” Funded by the President's Faculty Multicultural Research Award, University of Minnesota for \$7,336.

### **Conference Organizer / Chair:**

Organized a “Symposium on the Future Ageing Society”, co-organized by the Centre and Faculty of Social Sciences, was held on December 12, 2011 at Council Chamber, HKU. About 110 participants attended the symposium.

May 22, 2009 “Community participatory approach in promoting health literacy and reducing health disparity among immigrant and refugee communities. School of Social Work, University of Minnesota. (Conference co-chair: Professors Hee Y. Lee and Elizabeth Lightfoot)

May 11, 2007. “Creating Partnerships to Address the Mental Health Needs of Southeast Asians in Minnesota.” School of Social Work, University of Minnesota. Conference Chair.

January 8-10 2007. “CADENZA Symposium 2007: Preparing for an Elder Friendly Hong Kong. The University of Hong Kong.” Conference Co-Chair with Professor Ada Mui of Columbia University School of Social Work.

### **Keynote / Plenary Presentations**

1. Gave a talk on “Public Platform to Promote Productive Activities of Older People” in the Symposium on Productive Ageing in Asia, The University of Hong Kong.
2. Invited to give a talk on “Psychosocial Care of Dementia Caregivers” in the Alzheimer’s Disease Conference 2012: From Public Health, Basic and Clinical Sciences to Therapeutic Insights. June 15, 2012 in the Li Ka Shing Faculty of Medicine, The University of Hong Kong.
3. Invited to give a talk on “From community care to caring community” in the 2012 Yuen Long District Welfare Planning Forum. Tin Shui Wai, Yuen Long. March 2, 2012.
4. Feb 9, 2012. Invited keynote speaker to present a paper titled “Development of research in productive aging” in the “International Conference: Productive aging in Taiwan”, organized by the National Taiwan University.
5. Feb 6<sup>th</sup> 2012. Invited keynote speaker to present a paper title “老齡化社會下的長者政策與家庭養老文化及社會政策有何互動關係” in the 2<sup>nd</sup> Yan Oi Tong Cross-Strait Conference on Elderly Services organized by the Department of Social Work and Social Administration and the Yan Oi Tong.
6. Invited as a plenary speaker to present a paper titled "Evidence based elder care - How research contributes to improve the quality of care and quality of life of older people in long term care system." in the Knowledge Exchange Conference: Knowledge

Transforming Society in HK on Dec 7, 2011.

7. Aug10, 2011. Invited Plenary speaker to present a paper title “Advancing research/evaluation of productive aging program: Building the evidence base” in the *Productive Aging in China: Toward Evidence-Based Practice and Policy conference*, organized by the Washington University, Columbia University, Renmin University, and the HK Polytechnic University.
8. Keynote Speaker, “Consumer Direction and Community Based Long Term Care – U.S. Experience.” In “Aging in Place: Multi-faceted Collaboration and Partnership Seminar.”, organized by the Hospital Authority of Hong Kong and the Christian Family Social Service Center, Hong Kong, People Republic of China. June. 9, 2010.
9. Plenary Speaker, “Roles of Social Work Professions in Post-Disaster Intervention.” Paper presented at The Global Dialogue: International Conference on Post-Disaster Recovery and Reconstruction. Organized by the University of Hong Kong and the Beijing Normal University. China: Chengdu. Nov 13, 2008.
10. Invited Presenter, “Economic development and Household Economic well-being in Urban China.” (co-presenters: Zhang X. & Xu Y.). Conference on Social Cohesion in Greater China, Organized by the Center for Asia Study, the University of Hong Kong. June 6, 2008.
11. Keynote Speaker, Henry G. Leong Program – Symposium 2008. Title: “The global trend of elderly care” April 30, 2008. Hong Kong.
12. Plenary Speaker, International Conference on Filial Piety among Chinese Communities. Nov. 30, 2004. Hong Kong, People Republic of China.

### **Scholarly Journal Editorship**

Editorial Board Member, Journal of Applied Gerontology (Southern Gerontological Society, SAGE, London) (ISI indexed, impact factor 0.985 in 2010).

Editorial Board Member, Home Health Care Services Quarterly.

Editorial Board Member, Asian Journal of Gerontology and Geriatrics (Hong Kong Geriatrics Society and Hong Kong Association of Gerontology).

Consulting Editor, Social Development Issues.

Guest-editor, Journal of Gerontological Social Work,(Taylor & Francis, 2012).

## Scholarly Outputs:

### Books

1. Lightfoot E. & Lum T. (under contract, to be published in 2012) Community-Based Participatory Research in the Applied Social Sciences: Investigating Social and Community Issues. New York: Springer.

### Journal Articles (Graduate student coauthor underlined)

2. Parashuram S., **Lum T.Y.**, Shippee T., Wysocki A., Kane, R (under review) Incremental Effect of Chronic Conditions on Healthcare Expenditures of Older Dual Eligible Beneficiaries. *Health Affairs*.
3. Wang X. & **Lum T.** (2013). Role of the Professional Helpers in Disaster Intervention: Examples from the Wenchuan Earthquake in China. *Journal of Social Work in Disability and Rehabilitation*, 12 (1 & 2).
4. Cheng ST, **Lum T.**, Lam, LCW, Fung HH (under review). Hong Kong: Embracing a Fast Aging Society with Limited Welfare. *The Gerontologist*.
5. Danso K. & **Lum T.** (in press). Intergroup relations and predictors of immigrant experience. *Journal of Ethnic and Cultural Diversity in Social Work*.
6. Lum T.Y. (2012). Long-term Care in Asia, *Journal of Gerontological Social Work*, 55(7), 563-569. (Editorial).
7. Kane R.L., Wysocki A., Parashuram S., Shippee T., and Lum T.Y. (under review). The Effect of Long-term Care Use of Dually Eligible Beneficiaries on Medicaid and Medicare Expenditures. *Medicare and Medicaid Research Review*.
8. **Lum T.Y.**, Parashuram S., Shippee T., Wysocki A., Shippee N.D., Homyak P., Kane, R. (accepted). Diagnosed Prevalence and Health Care Expenditures of Mental Health Disorders among Dual Eligible Older People. *The Gerontologists*.
9. Lightfoot L., Blevins J., **Lum, T.** and Dube A. (under review). Cultural health assets of Somali and Oromo immigrants in the United States: Findings from a community-based participatory research project.
10. Lightfoot, E., Simmelinck, J. & **Lum. T.** (Accepted). Asset mapping as a tool for community based participatory research in social work. *Social Work Research*. (Impact factor: 0.449)
11. Kane, R. L., **Lum, T.Y.**, Kane, R., Homyak, P., Parashuram, S., & Wysocki, A. (in press). Does Home and Community-Based Care Affect Nursing Home Use? *Journal of Aging & Social Policy* (Impact factor 0.612 in 2010).
12. **Lum T.Y.** (In Press) Advancing Research on Productive Aging Activities in Greater Chinese Societies. *Aging International*.

13. Simmelink, J., Lightfoot, E., Dube, A., Blevins, J. & **Lum, T.** (2013). Understanding the Health Beliefs and Practices of East African refugees. *American Journal of Health Behavior*, 37, 155-161. (Impact factor: 1.295 in 2010)
14. **Lum T.Y.** (2011). Social Development and Aging, Editorial in a special issue on Social Development and Aging, Social Development Issues. 32(1), 1-5.
15. Lee H.Y., Lytle K., Yang P.N. & **Lum T.Y.** (2010). Mental Health Literacy in Southeast Asian Elderly Refugees: A Barrier to Understanding, Recognizing, and Responding to Depression. International Journal of Aging and Human Development, 71(4), 323-344. (2009 Impact Factor if 0.582)
16. **Lum T.Y.** (2010) Social Security, the Economy and Development (Book Review). Social Services Review, 84(4) 702-704. (2009 Impact Factor of 0.675)
17. **Lum T.Y.** & Vanderaa J.P. (2010) Health Disparities among Immigrant and Non-immigrant Elders: The Association of Acculturation and Education. Journal of Immigrant and Minority Health, 12 (5), 743-753. (2010 Impact Factor of 1.492)
18. **Lum T.Y.**, Kane, R.A., Cutler L.J., & Yu T-C. (2008). Effects of Green House Nursing Homes on Residents' Families. Health Care Financing Review, 30 (2), 35-51. (Impact Factor: 0.70 in 2008)
19. Kane R.A., **Lum T.Y.**, Cutler, L.J., Degenholtz H.B., and Yu T-C (2007). Resident Outcomes in Small-House Nursing Homes: A Longitudinal Evaluation of the Initial Green House Program. Journal of the American Geriatrics Society, 55, 832-839. (Impact factor: 3.81 in 2008)
20. Lightfoot, E. & **Lum, T.Y.** (2006) "Work behavior of older people with disabilities in the era of the Americans with Disabilities Act." Journal of Social Services Research, 32(4): 171-191. (Impact factor: 0.14 in 2008)
21. Lin W-C, **Lum T.Y.**, Mehr D.R. & Kane R.L. (2006). Measuring Pain Presence and Intensity in Nursing Home Residents. Journal of the American Medical Directors Association, 7(3): 147-153. (2009 Impact factor of 3.709).
22. Kane R.L., Homyak P., Bershady B. **Lum T.**, Flood S. & Zhang H. (2005) "The Quality of Care Under a Managed Care Program for Dual Eligibles." The Gerontologist, 45: 496-504. (Impact factor: 2.25 in 2008)
23. **Lum T.Y.** (2005). "Understanding the Racial and Ethnic Differences in Caregiving Arrangements" Journal of Gerontological Social Work, 45(4), 3-20.
24. Ozawa N.M. & **Lum T.Y.** (2005) "Men who work at age 70 or older." Journal of Gerontological Social Work, 45(4), 39-61.
25. **Lum T.Y.** & Lightfoot E. (2005) "Effects of volunteering on older people's health and

- mental health.” Research on Aging, 27(1): 31-55 (Impact factor: 0.97 in 2008)
26. **Lum T.Y.**, Lin W-C, & Kane R.L. (2005) Use of Proxy Respondents and Accuracy of MDS Assessments of Activities of Daily Living. Journal of Gerontology: Medical Sciences 60(5), 654-659. (2009 Impact factor of 3.08, 3/26 in Gerontology)
  27. **Lum Y.** (2004) Health-wealth association among older Americans: Racial and ethnic Differences. Social Work Research. 28(2): 106-116 (Impact factor: 0.72 in 2007).
  28. **Lum Y.** and Lightfoot E. (2003). The impact of health on retirement saving among older workers. Social Work Research, 27(1), 31-44. (Impact factor: 0.72 in 2007)
  29. Kane R.L., Homyak P., Bershinsky B. & **Lum Y.**, & Siadaty M.S. (2003) Outcomes of Managed Care of Dually Eligible Older Persons. The Gerontologist. 43(2):165-74 (2009 Impact factor of 1.88, 9/26 in Gerontology)
  30. Kane R.L., Homyak, P., Bershinsky B. and **Lum Y.** (2002). Consumer responses to the Wisconsin Partnership Program for Elderly Persons: A Variation on the PACE Model. Journal of Gerontology: Medical Sciences, 57A (4), M250-M258. (2009 Impact Factor of 3.083, 3/26 in Gerontology)
  31. Kane R.L., Flood S., Keckhafer G., Bershinsky B. & **Lum Y.** (2002). Nursing home residents covered by Medicare risk contracts: Early findings from the Evercare Evaluation Project. Journal of the American Geriatrics Society, 50, 719-727 (Impact factor: 3.81 in 2008)
  32. Ozawa, M.N and **Lum Y.** (2001) Taking risk in investing in the equity market: racial differences. Journal of Aging and Social Policy, 12(3), 1-21.
  33. **Lum, Y.**, Chang H.J., and Ozawa, M.N. (1999). The effects of race and ethnicity on use of health services by older Americans. Journal of Social Service Research, 25(4). 15-42. (Impact factor: 0.324 in 2007)
  34. Ozawa, M.N. and **Lum, Y.** (1998). Marital status and change in income status: 10 years after retirement. Social Work Research, 22, 116-128. (Impact factor: 0.72 in 2007)
  35. **Lum, Y.** and Chang H.J. (1998). The effect of Medicaid coverage on use of health services by low-income elderly people. Social Work Research, 22, 31-43. (Impact factor: 0.72 in 2007)
  36. Ozawa, M.N. and **Lum, Y.** (1997). Economic satisfaction among American Retirees. Journal of Gerontological Social Work. 27(4), 21-40.
  37. Ozawa, M.N. and **Lum, Y.** (1997). Safety net and poor: generational differences in the United States. Korean Journal of Social Welfare Studies, 9, 177-202.



38. Ozawa, M.N. and **Lum, Y.** (1996). How safe is the safety net for poor children? Social Work Research, 20, 238-254. (Impact factor: 0.72 in 2007)

### 39. Book Chapters

40. **Lum T.Y.**, Wang X., & Danso K. (2010). Role of Social Work Professionals in Szechuan Disaster Intervention. In Gillespie, F. D. & Danso, K. (Ed, TVA, Alexandria: CSWE Press.

41. Zhang X., **Lum T.Y.** & Xu Y. (2010) Economic development and Household Economic well-being in Urban China. In Ka Ho Mok and Yuen-Wen Ku (Ed.). Social Cohesion in Greater China: Challenges for Social Policy and Governance. London: World Scientific Publishing Company.

42. Mahaoney K.J. & **Lum T.Y.** (2008). Consumer Directed Care and Quality of Life of Older People in the Community: the Cash and Counseling Experience. Proceedings of CADENZA Symposium 2007: Preparing for an Elder Friendly Hong Kong.

43. Mahaoney K.J. & **Lum T.Y.** (2008). New Ways of Thinking about Home and Community Based Services for Elderly and People with Disability – Consumer Choice and Quality Management. Proceedings of CADENZA Symposium 2007: Preparing for an Elder Friendly Hong Kong.

44. **Lum T.Y.** (2006). “Using large survey datasets for research on older adults and families.” In B. Berkman and S. D'Ambruso (edited) The Oxford Handbook of Social Work in Aging. Oxford University Press.

45. **Lum, Y.** and Chang H.J. (2000). The effect of Medicaid coverage on use of health services by low-income elderly people. In S.M. Keigher, A.E. Fortune, and S.L. Witkin (edited) Aging and Social Work: The Changing Landscapes. Washington DC: NASW Press. (This chapter was originally published in the March 1998 issue of Social Work Research, Vol. 22, No.1, pp. 31-43).

46. Ozawa, M.N. and **Lum, Y.** (2000). Marital status and change in income status 10 years after retirement. In S.M. Keigher, A.E. Fortune, and S.L. Witkin (edited) Aging and Social Work: The Changing Landscapes. Washington DC: NASW Press. (This chapter was originally published in the June 1998 issue of Social Work Research, Vol. 22, No. 2, pp.116-128).

47. Ozawa, M.N., **Lum, Y.**, and Tseng, H.Y. (1999). Net worth at retirement and 10 years later. In S.S. Nagel (Ed.), The Substance of Public Policy, pp. 245-274. New York: Nova Science Publishers.

48. Ozawa, M.N. and **Lum, Y.** (1999). “How safe is the safety net for poor children?” in Hansan E. and Morris R. (eds.) Welfare Reform 1996-2000: Is there a safety net. Westport, CT: Greenwood Press. (This chapter was originally published in December 1996 issue of Social Work Research, Vol. 20, No. 4, pp. 238-254).

49. Ozawa, M.N. and **Lum, Y.** (1997). "How safe is the safety net for poor children?" in Ewalt P.L., Freeman E.M., Kirk S.A., and Poole D.L.(ed.) Social Policy: Reform, Research, and Practice. NASW Press. (This chapter was originally published in December 1996 issue of Social Work Research, Vol. 20, No. 4, pp. 238-254).

## 50. Reports

51. Chow N.W.S. & Lum T.Y. (2008). Trends in Family Attitudes and Values in Hong Kong. Reported submitted to the Central Policy Unit (CPU) of HKSAR.
52. Gibson, P.A. & Lum, T. Y. (2003). *Informal Kinship Care in Minnesota: A Pilot Study*. (Final Report to the Minnesota Kinship Care Association) University of Minnesota School of Social Work.

## Conference Proceedings (all juried paper selection included, Graduate student coauthor underlined)

53. **Lum, T.**; Parashuram S., Kane R.L., Homyak P., and Wysocki A. (2011) The Effects of Chronic Illness on Costs of Care for Older Persons Receiving Long-term Care. The Gerontologist 51 (Suppl 2). p. 591.
54. **Lum T.** (2011). Small house nursing homes for frail elders in Asian Countries? The Gerontologist 51 (Suppl 2). p. 353.
55. Kane R.A., Culter L., Lum T.Y., Peter L. (2011) Small house nursing homes and dementia care: Clientele and outcomes. The Gerontologist 51 (Suppl 2). p. 353.
56. Lum T.Y. (2011). Family care, living arrangements and health of older people in China. The Gerontologist 51 (Suppl 2). p. 378.
57. Lum T.Y. (2011) Generational difference in attitude toward filial piety and elder care in Hong Kong. The Gerontologist 51 (Suppl 2). p. 379.
58. **Lum T.Y.**, Xu Y., & Zhang X. (2010) "Economic development and the well-being of older people in Urban China. The Gerontologist, 50 (Suppl 1). p.135
59. **Lum T.Y.** (2011). Living arrangement, care needs, and well-being of older adults in China. The Gerontologist, 50 (Suppl 1). p.135.
60. **Lum T.Y.**, Yan E., Lau A., Leung G., Lam D., Chow M. (2010). Generational difference in attitude toward filial piety in Hong Kong. The Gerontologist, 50 (Suppl 1). p.381.
61. **Lum T.Y.** (2010). Social Development and Population Aging in Asia – implication for long term care services. Paper presented at the 2010 Joint World Conference on Social Work and

Social Development: The Agenda. June 13, 2010, Hong Kong, China.

62. **Lum T.Y.** and Zhou R. (2010). Culture and mental health: Perceived effectiveness of indigenous and western mental health interventions by mental health services providers in the United States. Paper presented at the 2010 Joint World Conference on Social Work and Social Development: The Agenda. June 13, 2010, Hong Kong, China.
63. Danso K. and **Lum T.Y.** (2010). Hostile or friendly: Immigrants perception of Americans. Paper presented at the 2010 Joint World Conference on Social Work and Social Development: The Agenda. June 13, 2010, Hong Kong, China.
64. **Lum T.Y.** and Li X. (2010). Health dynamics of the oldest old in United States. Poster presented at the 2010 Joint World Conference on Social Work and Social Development: The Agenda. June 11, 2010, Hong Kong, China.
65. **Lum T. Y.**, Ng A., Yan, E., Lam D., Leung G., Chow M.L. (2010). Impacts of Gender Role on the family attitudes and values in Hong Kong. Poster presented at the 2010 Joint World Conference on Social Work and Social Development: The Agenda. June 11, 2010, Hong Kong, China.
66. Lum T.Y., Xu Y. & Zhang X. (2001) Economic development and household economic well-being of older people in urban China. *The Gerontologist*, 49 (Suppl 2). p.98.
67. **Lum T.Y.** & Danso K. (2009). Racial and ethnic differences in health and mental trajectories of older people. *The Gerontologist*, 49 (Suppl 2). p.141.
68. **Lum T.Y.** & Chan R. (2008). Trajectory of health between immigrant and non-immigrant elders. *The Gerontologist* 48 (Special Issue 3). p. 317.
69. **Lum T.Y.** & Lightfoot E. (2007). Disparity in Health and Disparity in Wealth: Impacts of Human Capital and Health Capital on Retirement Savings. Paper presented at the 9th Annual Conference of the Society for Social Work and Research. January, 13, 2007. CA: San Francisco.
70. **Lum. T.Y.** (2006) "Services Needs of Homeless Elders". *The Gerontologist* 46 (Special Issue I). p. 473.
71. Kane R.L. Kane R.L. **Lum, T.Y.** (2006). "The Relationship between Changes in the Extent of HCBS and Nursing Home Case Mix." *The Gerontologist* 46 (Special Issue I). p. 349.
72. Gibson P. & Lum T. (2006). "Impact of raising grandchildren on the well-being of older grandparents." *The Gerontologist* 46 (Special Issue I). p. 303.
73. **Lum T.Y.**, Vallecillo B., & Davison L. (2006). "Peer Mental Health Counseling for Older People: Clients and Volunteers Outcomes." *The Gerontologist* 46 (Special Issue I). p. 147.

74. Lightfoot E. and **Lum T.Y.** (2006) "An Analysis of Work Accommodation Rates for Older Adults since the Implementation of the Americans with Disabilities Act." Paper presented at the 9<sup>th</sup> Annual Conference of the Society for Social Work and Research. January, 12, 2006-January 25, 2006 TX: San Antonio.
75. **Lum T.** (2005). "Quality Indicators in the Green Houses Compared to Conventional Nursing Home Care." *The Gerontologist* 45 (Special Issue II). p. 371.
76. **Lum T.** (2005). "Adjustment for Complex Sampling Designs in Secondary Analysis: An Example Using HRS/AHEAD Data in Aging Research." *The Gerontologist* 45 (Special Issue II). p. 181.
77. **Lum T.** (2005). "Certificate and Other Infusing Strategies to Enhance Geriatric Social Work Training in Undergraduate and Graduate Programs." In *Social Work Education in Asian Communities*. August 6, 2005 China: Beijing.
78. Kane R.A., Cutler L.J., **Lum, T.** & Yu A. (2005). "Results from the Green House Evaluation in Tupelo, MS." Paper presented at the Academy Health Annual Meeting, June 26, 2005. MA: Boston.
79. **Lum T.** and Vallecillo B. (2005). "Results for the Elders Counseling Elders Mental Health Program." Paper presented at the 2005 Joint conference of The National Council on the Aging (NCOA) and the American Society on Aging (ASA), March 11, 2005. PA: Philadelphia
80. Vang, P. & **Lum T.** (2005). "Southeast Asian Adult Mental Health: Barriers to Service Utilization". Paper presented at the 51<sup>st</sup> Annual Program Meeting of the Counsel on Social Work Education. February 27, 2005. NY: New York City.
81. **Lum T.Y.** & Kwon H.K. (2004). "Health disparities among immigrant and non-immigrant old people: The effects of acculturation and human capital." *The Gerontologist* 44 (Special Issue I). p. 391.
82. Kane R.A., Cutler L. J. & **Lum T.Y.** (2004). Studying The Green Houses In Tupelo, MS: Preliminary Lessons From A Radical Example Of Culture Change In Action. *The Gerontologist* 44 (Special Issue I). p. 241.
83. **Lum Y.**, Lin W-C, & Kane R.L. (2004) Use of Proxy Respondents and Accuracy of MDS Assessments of Activities of Daily Living. *The Gerontologist* 44 (Special Issue I). p. 67.
84. **Lum Y.** (2003) "Impacts of volunteering on older people's adjustment of their aging process – a mixed method study." *The Gerontologist* 43 (Special Issue 3).
85. **Lum Y** & Lightfoot E. (2003) "Do disability anti-discrimination laws increase labor force participation? A longitudinal study." Paper presented at the 49<sup>th</sup> Annual Program Meeting of the Counsel on Social Work Education. February 27-March 2, 2003, Atlanta, Georgia.

86. Phan P. & **Lum Y.** (2003) "Social Work and Southeast Asian: Needs, Utilization, and Intervention: A 25-Year Review." Paper presented at the 49<sup>th</sup> Annual Program Meeting of the Council on Social Work Education. February 27-March 2, 2003, Atlanta, Georgia.
87. **Lum Y.** & Lightfoot E. (2002) "Live longer and be happier: Is volunteering the missing link." Paper presented at the 7<sup>th</sup> Annual Conference of the Society for Social Work and Research. January 16-19, 2003. Washington DC.
88. Lightfoot E. & **Lum, Y.** (2003) "Do disability rights laws increase labor force participation? A longitudinal study of employment rates of older persons with disabilities." Paper presented at the 7<sup>th</sup> Annual Meeting of the Society for Social Work and Research. January 16-19, 2003, Washington DC.
89. Lightfoot E. & **Lum Y.** (2002) "Volunteerism in a Changing World: How Volunteering Affects Older People's Physical and Mental Health" *The Gerontologist* 42 (Special Issue I). p. 236.
90. Degenholtz H.B., Kane R.L., Lin W-C, & **Lum Y.** (2002) "Making the Best of the MDS". Paper presented at the 130 Annual Meeting of the American Public Health Association, November 11, 2002.
91. **Lum Y.** and Lightfoot E. (2002) "Impact of health on retirement savings among older workers." 48<sup>th</sup> Annual Program Meeting of the Council on Social Work Education. February 24-27, 2002, Nashville, Tennessee.
92. **Lum Y.** (2001) "Racial and ethnic differences in family caregiving for frail elderly: economic, family structural and cultural explanations." *The Gerontologist* 41 (Special Issue I).
93. **Lum Y.** (2001) "Family Care Giving among Elderly People: Racial and Ethnic Differences. Paper presented at the 47<sup>th</sup> Annual Program Meeting of the Council on Social Work Education. March 8-11, 2001, Dallas, Texas.
94. **Lum Y.** (2000) "Effects of Health on Asset Accumulation and Retirement Saving." *The Gerontologist* 40 (Special Issue I). p. 131.
95. Ozawa, M.N, and **Lum Y.** (1999) "Taking risk in investing in the equity market: racial differences." *The Gerontologist* 39 (Special Issue I). p. 37.
96. **Lum, Y.** (1998) "The racial and ethnic differences in health-wealth association among older Americans." Paper presented at the 44<sup>th</sup> Annual Program Meeting of the Council on Social Work Education, March 6, 1998, Orlando.
97. Ozawa, M.N. and **Lum, Y.** (1997) "How safe is the safety net for poor children." Paper presented at the Odyssey Forum. November 21, 1997, Baltimore.

98. Ozawa, M.N. and **Lum, Y.** (1997) "Change in net worth in advancing old age." *The Gerontologist* 36 (Special Issue I). p. 279.
99. **Lum, Y.** and Chang, H.J. (1997) "Effect of Medicaid coverage on use of health services by poor elderly people - racial and gender differences." Poster presented at the 125th Annual Meeting of the American Public Health Association. November 11, 1997, Indianapolis.
100. **Lum, Y.**, Chang, H.J., and Ozawa, M.N. (1997) "Gender and racial differences in health services utilization among the elderly." Paper presented at the 43rd Annual Program Meeting of the Council on Social Work Education. March 9, 1997, Chicago.
101. Chang, H.J. and **Lum, Y.** (1997) "Informal support networks and patterns of elderly care: Ethnic group comparisons." Paper presented at the 43rd Annual Program Meeting of the Council on Social Work Education. March 9, 1997, Chicago.
102. **Lum, Y.** and Chang, H.J. (1996) "Racial differences in utilization of health and community care services among older Americans." Paper presented at the 124th Annual Meeting of the American Public Health Association. November 19, 1996, New York City.
103. Chang, H.J. and **Lum, Y.** (1996) "Risk factors associated with depression in a national sample of older adults." Paper presented at the 124th Annual Meeting of the American Public Health Association. November 19, 1996, New York City.
104. **Lum, Y.**, Chang, H.J., and Ozawa, M.N. (1996) "Effects of social network and economic resources on use of health services by the elderly." *The Gerontologist* 36(Special Issue I). p. 123.
105. Ozawa, M.N. and **Lum, Y.** (1996) "Change in women's income status in advancing old age." *The Gerontologist* 36 (Special Issue I). p. 11
106. Ozawa, M.N. and **Lum, Y.** (1996) "How safe is the safety net for poor children." Paper presented at the 1996 Association for Public Policy Analysis and Management Annual Research Conference. November 1, 1996, Pittsburgh.
107. Chang, H.J., **Lum, Y.**, and Edwards, D. (1996) "Formal service use by demented elderly and their care-givers: a path model." Paper presented at the 42nd Annual Program Meeting of the Council on Social Work Education. February 17, 1996, Washington DC.
108. Ozawa, M.N. and **Lum, Y.** (1995) "Safety-net for the Elderly Poor." *The Gerontologist* 35(Special Issue I). p. 275.

### **International Faculty Development Program**

1. July 13-July 24, 2009. 3<sup>rd</sup> CADENZA Faculty Fellow Program. A Two week faculty development program funded by the Hong Kong Jockey Club. Participated by faculty

members from 4 major universities in Hong Kong. Including professors in all rankings and from different disciplines (medicine, nursing, social work, applied social sciences, rehabilitation sciences) (co-trainers: Robert Kane and Rosalie Kane).

2. June 16-June 27, 2008. 2<sup>nd</sup> CADENZA Faculty Fellow Program. A Two week faculty development program funded by the Hong Kong Jockey Club. Participated by faculty from 4 major universities in Hong Kong. Including professors in all rankings and from different disciplines (co-trainers: Robert Kane and Rosalie Kane).
3. July 2, 2007 - July 13 2007. 1<sup>st</sup> CADENZA Faculty Fellow Program. An intervention research methods training for 10 faculty from 4 universities in Hong Kong. Funded by the Hong Kong Jockey Club. (Co-trainers: Professors Robert Kane and Rosalie Kane).

### **Invited Presentations (not peer reviewed)**

#### **Invited Conference presentations**

1. **Lum T.Y.** (2008) "Roles of Social Work Professions in Post-Disaster Intervention." Paper presented at The Global Dialogue: International Conference on Post-Disaster Recovery and Reconstruction. Organized by the University of Hong Kong and the Beijing Normal University. China: Chengdu. Nov 13, 2008.
2. Zhang X., **Lum T.Y.** & Xu Y. "Economic development and Household Economic well-being in Urban China." In the Conference on Social Cohesion in Greater China, Organized by the Center for Asia Study, the University of Hong Kong. June 6, 2008.
3. Lee H., **Lum T.Y.**, Vang P.D., Lytle K. VanDeBoom T., Shannon S.K.S. (2007). "Southeast Asians in Minnesota." Paper presented in the "Creating Partnerships to Address the Mental Health Needs of Southeast Asians in Minnesota" conference on May 11, 2007. Organized by the University of Minnesota School of Social Work. MN: St. Paul.
4. Vang P.D. **Lum T.Y.**, Lee H., Lytle K., Shannon S.K.S., VanDeBoom T., (2007). "What We Know About Southeast Asian Mental Health." Paper presented in the "Creating Partnerships to Address the Mental Health Needs of Southeast Asians in Minnesota" conference on May 11, 2007. Organized by the University of Minnesota School of Social Work. MN: St. Paul.
5. Kytte K. **Lum T.Y.**, Lee H., Vang P.D., Shannon S.K.S., VanDeBoom T., (2007). "Voices of Mental Health Service Providers." Paper presented in the "Creating Partnerships to Address the Mental Health Needs of Southeast Asians in Minnesota" conference on May 11, 2007. Organized by the University of Minnesota School of Social Work. MN: St. Paul.

#### **Invited Research Seminar presentation**

1. **\*Lum T.Y.** (2008) “Study of the Green Houses in the US and Implications for Replication: De-institutionalizing Nursing Homes.” Research seminar presented at the University of Hong Kong on January 28, 2008.
2. **\*Lum T.Y.** (2008) “Long term care in the United State”. Invited paper presentation at the College of Social Development and Public Policy, The Beijing Normal University. Dec. 17, 2008.
3. **\*Lum T. Y.** (2008) Study of the Green Houses in the US and Implications for Replication: De-institutionalizing Nursing Homes. Research seminar presented at the University of Hong Kong on January 28, 2008.
4. **\*Lum T.Y.** (2007). “Multifaceted Study of the Green Houses in the US and Implications for Replication: De-institutionalizing Nursing Homes.” Invited Research Seminar Presentation at the Nursing School of the Chinese University of Hong Kong on Oct 30, 2007
5. **Lum T.Y.** (2006). Antipoverty programs: theories and direction. Family and Children Services of Minnesota. April 20, 2006. MN: Minneapolis.
6. **Lum T.Y.** (2005). Outcomes measures for mental health counseling. Presentation to Counselor training for the Elders Counseling Elders Program. Little Brother Friends of the Elderly. November 14, 2005. MN: Minneapolis.
7. **\*Lum T.Y.** (2005). New Direction of Nursing Home Care in the United States – The Green House Project. Paper presented in the Long Term Care Forum at the University of Hong Kong, July 30, 2005. Hong Kong.
8. **Lum T.Y.** (2003). “Findings of the of the Minnesota Kinship Care Survey”. Unplanned Parenthood II, Center for Advanced Studies in Child Welfare, School of Social Work, University of Minnesota. October 6, 2003, MN: St. Paul. (with Dr. Gibson).
9. **Lum T.Y.** (2003). “Outcome measures for caregiving services.” Catholic Charities of St. Paul, Minnesota. June 24, 2003, Minnesota: St. Paul.
10. **Lum T.Y.** (2003). “Outcome of Continuous Quality Improvement Survey of Division of Aging Services.” Catholic Charities of St. Paul. April 29, 2003
11. **Lum T.Y.** (2003). “Use of GDS and Burden Scale in Outcome evaluation.” Eldercare Partners of Minnesota. May 20, 2003, Minnesota: Twin Cities.
12. **Lum T.Y.** (2003) “Outcome measures for mental health counseling.” Catholic Charities of St. Paul. April 11, 2003. MN: St. Paul.



13. **Lum T.Y.** (2003). "Early findings of the Minnesota Kinship Care Survey." Minnesota Juvenile Officers Institute. January 30, 2003. MN: Twin Cities. (With Dr. Priscilla Gibson).
14. **\*Lum T.Y.** (2002) "Social Security Reform and Economic Well-being of Older Americans." Sau Po Center on Ageing at the University of Hong Kong. July 26, 2002. PRC: Hong Kong.
15. **\*Lum T.Y.** (2002). "Impact of volunteering on older people's health and well-being". Sau Po Center on Ageing at the University of Hong Kong. July 17, 2002. PRC: Hong Kong.
16. **\*Lum T.Y.** (2001). "Subvention reform in Hong Kong." Social Work Department of Hong Kong. July 18, 2001. PRC: Hong Kong.
17. **\*Lum T.Y.** (2001). "Quality Improvement Evaluation." Catholic Charities of St. Paul, Minnesota. April 10, 2001, MN: Twin Cities.
18. **\*Lum T.Y.** (2000) "The association between health and wealth among older Americans." Breakfast Seminar at the School of Social Work, University of Minnesota. December 6, 2000. MN: Twin Cities
19. **\*Lum T.Y.** (2000) "Welfare policy in U.S.A." Social Welfare Department of Hong Kong. June 14, 2000. PRC: Hong Kong
20. **Lum T.Y.** (2000). "The racial and ethnic difference in the wealth-health association among older American." Center on Aging, University of Minnesota – Twin Cities. February 24, 2000. MN: Twin Cities
21. **\*Lum T.Y.** (1998) "The latest development of gerontological research in the U.S." Department of Social Work and Social Administration at The University of Hong Kong. October 14, 1998. PRC: Hong Kong.
22. **\*Lum T.Y.** (1998). "Use of secondary data in social work research." The Department of Social Work and Social Administration at The University of Hong Kong. October 10, 1998. PRC: Hong Kong.

### **Invited Training Workshops:**

1. **\*Lum T.Y.** (2009). A two hour training workshop on program evaluation at Shangdong University in China. Invited by the Center for Social Development at Washington University and the Shangdong University. July 30, 2009. China: Jinan, Shangdon.
2. **\*Lum T.Y.** (2008). A One day workshop on research methods for a group of 10 university faculty from Hong Kong (co-trainers: Robert Kane and Rosalie Kane). Organized by the University of Hong Kong. Nov 24, 2008. Maryland: Two Habors.

3. **\*Lum T.Y.** (2007). Long-term care system in the USA. Organized by the Henry G. Leong Program at the University of Hong Kong. Dec 7, 2007. China: Hong Kong.
4. **\*Lum T.Y.** (2007). Ideology, values & constraints of community-based holistic care in the USA: Consumer Directed Care & the Cash and Counseling Program. Organized by the Henry G. Leong Program at the University of Hong Kong. July 30, 2007. China: Hong Kong.
5. **\*Lum T.Y.** (2002). “Workshops on program evaluation.” Social Welfare Department of Hong Kong. Hong Kong. July 12 to 21, 2002. PRC: Hong Kong
6. **\*Lum T.Y.** (2002). “Seminar on policy evaluation.” Hong Kong Council of Social Welfare. June 19, 2002. PRC: Hong Kong.
7. **\*Lum T.Y.** (2002). “Workshop on program evaluation.” Yan Chai Hospital Social Services Department. May 27 and June 24, 2002. PRC: Hong Kong.
8. **\*Lum T.Y.** (2001) “Two Week training on program evaluation and practice evaluation”. Social Welfare Department of Hong Kong. July, 2001. PRC: Hong Kong.
9. **\*Lum T.Y.** (2001). “Policy analysis.” Social Welfare Department of Hong Kong. July 17, 2001. PRC: Hong Kong.
10. **\*Lum T.Y.** (2001) “Program evaluation.” Catholic Charities of St. Paul, Minnesota. June 1, 2001. MN: Twin Cities.
11. **\*Lum T.Y.** (2000) “Workshop on program evaluation and outcome measures.” Center on Aging at the University of Hong Kong. June 10 & 17, 2000. PRC: Hong Kong.

## **GRANT REVIEWER**

2009-pres      Earmarked Research Grant, Research Grants Council of Hong Kong Government

## **EDITORIAL WORK**

### Ad hoc Reviewer

AAPI Nexus: Asian Americans & Pacific Islanders, Policy, Practice and Community.  
Aging and Society  
Aging International  
Asia Pacific Journal of Social Work & Development

Family Practice.  
International Migration  
International Journal of Social Welfare  
Journal of Aging and Health.  
Journal of Aging and Human Development.  
Journal of Applied Gerontology  
Journal of America Geriatric Society  
Journal of Gerontology – Social Sciences  
Journal of Gerontological Social Work  
Journal of Social Services Research  
Research on Aging.  
Social Development Issues  
The Gerontologist.