CURRICULUM VITA

MARLENE S. STUM
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EDUCATION

PhD Continuing and Vocational Education (Minor: Social Gerontology), University of Wisconsin—Madison, 1988. Dissertation: *Housing Managers and Environments for Elderly Residents: A Situational Analysis and Implications for Human Resource Training.*

MS Family Economics, Kansas State University, 1978.

BS Consumer Affairs, Kansas State University, 1976.

PROFESSIONAL EXPERIENCE

1988 – present	Professor, Department of Family Social Science, University of Minnesota, St Paul Minnesota, and State Extension Faculty in the University of Minnesota Extension Service, Family Economics and Gerontology
1988	Lecturer, Department of Consumer Science, University of Wisconsin—Madison
1984-1985	Acting Assistant Dean for Student Affairs, School of Family Resources and Consumer Sciences, University of Wisconsin—Madison
1983-1984	Lecturer, Department of Consumer Science, University of Wisconsin—Madison
1981-1983	Department Chair, Department of Home Economics, Humboldt State University, Arcata, California
1978-1983	Assistant Professor, Department of Home Economics, Humboldt State University, Arcata, California

HONORS AND AWARDS

2018	Excellence in Multi-state Collaboration Award (3rd place). North Central Region Aging Network (NCRAN). National Extension Association of Family & Consumer Sciences. (MN participant)
2017	Outstanding Community Engagement Award. Association of Public Land Grant Universities Board on Human Sciences. Washington, DC.

2011-12	Invited Technical Expert Panel member for U.S. Department of Health and Human Services. Community Living Assistance Services and Supports (CLASS) program and National Clearinghouse for long term care information.
2007	Fellow status in Gerontological Society of America
2007	Educational Curriculum Package Communications Award (State award, second in Central Region, third place nationally) National Extension Association of Family and Consumer Sciences.
2006	Outstanding Conference Paper. "Financing long term care: Risk management intentions and behaviors of couples." Association for Financial Counseling and Planning Education (AFCPE). San Antonio, TX.
2005	Financial Security in Later Life National Initiative Management Team. Dean Don Felker Financial Management Award NEAFCS Southern Region.
2004	Financial Security in Later Life National Initiative. Outstanding Educational Program. Association for Financial Counseling and Planning Education (AFCPE). Member of national team and major contributor to resources.
2004	Financial Security in Later Life National Initiative. Honorable Mention. American Distance Education Consortium (ADEC) Excellence in College and University Distance Education Award.
2001-2006	Cooperative Extension National Initiative Development and Management Team Member for "Financial Security in Later Life." One of 13 faculty nationwide nominated and selected for leadership roles. CSREES.
1999	Harlan Copeland Award for Excellence in Programming for "Who Gets Grandma's Yellow Pie Plate?"™ (Minnesota Association for Continuing Adult Education)
1999	Commendation from Governor of Minnesota for Partnership efforts with Project 2030, Aging Initiative upon recommendation of Board of Directors of Partnership Minnesota
1997	University of Minnesota Dean and Director's Team Award for "Who Gets Grandma's Yellow Pie Plate?"™
1997	Epsilon Sigma Phi (National Honorary Extension Fraternity) Distinguished Regional Team Award for "Who Gets Grandma's Yellow Pie Plate?"™
1997	National Extension Association of Family and Consumer Sciences Florence

	Hall Award for “Who Gets Grandma’s Yellow Pie Plate?”™
1997	College of Human Ecology Award, Contributions to Community
1996	State Team Award, “Who Gets Grandma’s Yellow Pie Plate?”™ program development, Epsilon Sigma Phi, National Honorary Extension Fraternity
1993	Applied Consumer Economics Award for “Elderly and Out-of-Pocket Home Care: Are Expenses Catastrophic?” American Council on Consumer Interests
1992-1993	Fellow, Minnesota Area Geriatric Education Center, University of Minnesota, Minneapolis, MN

RESEARCH

REFEREED JOURNAL ARTICLES

Jensen, E.J., M.S. Stum, & M. Jackson. (2018). What Makes Inheritance Fair in Stepfamilies? Examining Perceptions and Complexities, Journal of Divorce & Remarriage, DOI: 10.1080/10502556.2018.1488123

Woosley, A., Danes, S. M., & Stum, M. (2016). Utilizing a Family Decision-Making Lens to Examine Adults’ End-of-Life Planning Actions. Journal of Family and Economic Issues, 1-12. 10.1007/s10834-016-9497-0

Stum, M. (2016). Elder family financial exploitation: The critical role and response of professionals. Certified Senior Advisors, 66(2), 23-17.

Barnett, A., & M. S. Stum. (2013). Spousal decision making and long term care insurance. Journal of Financial Counseling and Planning Education. 24(2), 5-19.

Barnett, A. & M.S. Stum. (2012). Couples managing the risk of financing long term care. Journal of Family & Economic Issues. 33, 363-375.

Stum, M. S. (2012). The fairness issue in estate planning. Society of Certified Senior Advisors (CSA) Journal. 53, 49-57.

Stum, M. (2012). Long term care: Do your client’s beliefs put them at risk? Society of Certified Senior Advisors (CSA) Journal. 52, 59-66.

Stum, M. S. (2012). What you need to know about being fair. Society of Certified Senior Advisors (CSA) Journal. 53, 63-65.

Stum, M. S. (2012). Who will get all our treasured possessions? A case study. Society of Certified Senior Advisors (CSA) Journal. 53, 58-61

Matzek, M. & M.S. Stum. (2010). Are consumers vulnerable to low long term care knowledge? Family and Consumer Sciences Research Journal. 38(4), 410-434.

Stum, M. (2008). Group Long Term Care Insurance: Decision Making Factors and Implications for Financing Long Term Care. Journal of Aging and Social Policy. 29(2); 165-181.

Schaber, P. & M. Stum. (2007). Factors impacting group long term care insurance enrollment decisions. Journal of Family and Economic Issues. 28(2), 189-205.

Stum, M. (2007). Financing long term care: Risk management intentions and behaviors of couples. Financial Counseling and Planning. 17(2), 79-89.

Porter, N., DeVaney, S., Poling, R., Stum, M. & Schuchardt, J. (December 2005). Financial security in later life: A national initiative and a potential model for e-Extension. Journal of Extension. 43(6). (10 pages) http://www.joe.org/joe/2005december/a7.shtml (article # 6FEA6)

Stum, M. (2004). Who Gets Grandma's Yellow Pie Plate? Society of Certified Senior Advisors (CSA) Journal. 24. 34-39.

Stum, M. (2003). Who Gets Grandma's Yellow Pie Plate? Journal of Family and Consumer Science. 95 (7). American Association of Family and Consumer Sciences. (invited for Strategies in Action section)

Stum, M. (2001). Financing long term care: Examining decision outcomes and systemic influences from the perspective of family members. Journal of Family and Economic Issues, 22(1), 25-53.

Stum, M. (2000). Later life financial security: Examining the meaning attributed to goals when coping with long term care. Financial Counseling and Planning, 11(1), 25-37.

Stum, M. (2000). Families and inheritance decisions: Examining non-titled property transfers. Journal of Family and Economic Issues, 21(2), 177-202.

Dolan, E., Stum, M., & Rupured, M. (1999). Addressing the economic security issues facing same-sex couples. Advancing the Consumer Interest, 11(1), 23-29.

Stum, M. (1999). I just want to be fair: Interpersonal justice in intergenerational transfers of non-titled property. Family Relations, 48(2), 159-166.

Stum, M. (1998). The meaning and experience of spending down to Medicaid in later life. Advancing the Consumer Interest, 10(2), 23-34.

Dolan, E., & Stum, M. (1998). Economic security and financial management issues facing same-sex couples. Journal of Family and Economic Issues, 19(4), 343-365.

Stum, M., Bauer, J., & Delaney, P. (1998). Disabled elders out-of-pocket home care expenses: Examining financial burden. Journal of Consumer Affairs, 32(1), 82-105.

Stum, M., Bauer, J., & Delaney, P. (1996). Out-of-pocket home care expenditures for disabled elderly. Journal of Consumer Affairs, 30(1), 24-47.

Bauer, J., & Stum, M. (1994). Money management needs and help of elderly living in the community. Financial Counseling and Planning, 5, 147-159.

Stum, M. (1993). Knowledge of aging of subsidized housing managers for the elderly: Implications for training. Educational Gerontology, 19, 127-138.

Stum, M., Bauer, J., & Delaney, P. (1993). Economic well-being of disabled elderly living in the community. Financial Counseling and Planning, 4, 199-216.

Bauer, J., Stum, M., & Delaney, P. (1993). Economic well-being of the chronically disabled elderly: Implications for practice and policy. Families in Society, 74(8), 460-667.

Stum, M. (1992). Understanding differences in training for managers of subsidized housing for the elderly: A situational analysis approach. Gerontology and Geriatrics Education, 12(4), 1-16.

Stum, M. (1992). Seeking solutions to solid waste management: The role of lifestyles. Journal of Consumer Education (10), 20-26.

Detzner, D., Bell, L., & Stum, M. (1991). The meaning of home and possessions to elderly public housing residents displaced by fire. Housing and Society, 18(2), 3-12.

Stum, M. (1990). Elderly consumers' knowledge of HMOs. The Journal of Consumer Education, 8, 19-25.

Stum, M. (1990). Elderly consumers in the health care marketplace. Advancing the Consumer Interest, 2(2), 7-12.

OTHER PUBLICATIONS

Jordan, E., & Stum, M. (2017). Families and fair inheritance decisions. Family Therapy Magazine*, 16,* 32-34. (bi-monthly publication of American Association for Marriage and Family Therapy) Editorial Board reviewed.

REFEREED PROCEEDINGS

Stum, M. (2007). Financing long term care: Risk management intentions and behaviors of couples. Proceedings, Association of Financial Counseling and Planning Education 2006 Annual Conference. 67-75.

Stum, M. (2004). Financing long term care: A new on-line resource center. Proceedings, Association of Financial Counseling and Planning Education Annual Conference. 43.

Stum, M., Bechman, J., & S. Knight. (2002). Take the Road to Financial Security Later in Life. Proceedings, Association of Financial Counseling and Planning Annual Conference.

Stum, M. (2001). Educating consumers about financing long term care: An impact evaluation. Consumer Interests Annual, 47, 1-5.

Stum, M. (1999). Educating consumers about financing long term care: Opportunities and challenges. Consumer Interests Annual, 45, 145.

Dolan, E., & Stum, M. (1997). Economic security issues of married couples versus unmarried couples. Consumer Interests Annual, 43, 90-95.

Garner, T., Stinson, L., Heck, R., Stum, M., Fast, J., & Schuchardt, J. (1997). Coping during periods of economic uncertainty. Consumer Interests Annual, 43, 196-199.

Stum, M. (1997). Financing long term care: A family perspective of private and public responsibility. Consumer Interests Annual, 43, 142-157.

Stum, M. (1997). Who gets grandma's yellow pie plate? A consumer education program addressing the transfer of non-titled property. Consumer Interests Annual, 43, 157.

Stum, M., Hong, G., & White-Means, S. (1995). Resource use and decision making in caregiving of frail elders: Is research informing public policy? Consumer Interests Annual, 41, 228-234. American Council on Consumer Interests.

Bauer, J., & Stum, M. (1994). Money management needs and help of elderly living in the community. Consumer Interests Annual, 40, Minneapolis MN, 105-112.

Frazer, M., & Stum, M. (1994). Long term care decision making: Perceptions of distributive and procedural justice. Theory Construction and Research Methods Proceedings for National Council on Family Relations, Minneapolis MN, 103-116.

Stum, M., & Dolan, E. (1994). Sexual orientation: Are family economists addressing economic issues of diverse consumers? Consumer Interests Annual, 40, Minneapolis MN, 351-352.

Stum, M., Bauer, J., & Delaney, P. (1993). Elderly and out-of-pocket home care: Are expenses catastrophic? Applied Consumer Economics Award. Proceedings, American Council on Consumer Interests. Lexington KY, 82-88.

Stum, M., Schmitz, K., & Sarver, J. (1993). Quality of nursing home care: Family members as extended consumers. Proceedings, American Council on Consumer Interests. Lexington KY, 250-251.

Stum, M., Bauer, J., & Delaney, P. (1992). Out-of-pocket home care expenditures among disabled non-institutionalized elderly. Proceedings, American Council on Consumer Interests. Toronto, Canada, 53-60.

Stum, M., & Goebel, K. (1992). Life and death health care decisions: Legal rights, policy trends, and consumer education challenges. Proceedings, American Council on Consumer Interests. Toronto, Canada, 195-196.

Stum, M. (1992). Examining the influence of values and lifestyles on environmental decisions. Proceedings, American Council on Consumer Interests. Toronto, Canada, 231-234.

Stum, M., Bauer, J., & Delaney, P. (1991). Economic well-being of elderly with functional limitations. Proceedings, Family Economic Well-Being in the Next Century Family Economics-Home Management Pre-Conference to AHEA. Minneapolis MN, 39-47.

Stum, M. (1991). Educating consumers to take control of life and death health care decisions. Proceedings, American Council on Consumer Interests. Cincinnati OH, 235.

Stum, M. (1991). Life and death health care decisions: A pilot study to educate family members. Proceedings, Family Economic Well-Being in the Next Century Family Economics-Home Management Pre-Conference to AHEA. Minneapolis MN, 59.

Stum, M. (1989). Aging-in-place: Are responses in the best interest of elderly consumers? Proceedings, American Council on Consumer Interests. Baltimore MD, 37-40.

Stum, M. (1989). Experience of elderly consumers in health maintenance organizations. Proceedings, American Council on Consumer Interests. Baltimore MD, 49-53.

Stum, M. (1989). Financing long term care: A risk management perspective. Proceedings, Families in Transition: American Home Economics Pre-Conference. Cincinnati OH, 22-31.

REFEREED NATIONAL CONFERENCE PROCEEDING ABSTRACTS

Stum, M. (2019). *A fairness lens to later-life planning,* Innovation in Aging, 3 (Suuplement1), S426). Gerontology Society of America. doi: https://doi.org/10.1093/geroni/igz038.1591

Kilaberia, T., Fuhrman, E.*, Stum, M., & Freeman, I. (2019). *Elder family financial exploitation: Experiences with social services*, Innovation in Aging, 3 (Supplement 1), S920). Gerontology Society of America. doi:https://doi.org/10.1093/geroni/igz038.3352

Bolkan, C., Stum, M., & Teaster, P. (2019). *Elder financial abuse in families: Expanding theory and research.* Innovation in Aging, 3 (Suuplement 1), S383).Gerontology Society of America. doi: https://doi:org/10.1093/geroni/igz038.1406

Stum, M. (2019). Examining the nature and role of family system interactions and elder family financial exploitation. Innovation in Aging, *3* (Supplement 1), S383-384). Gerontology Society of America. doi: https://doi.org/10.1093/geroni/igz038.1408

Stum, M. (2018). The ripple effects of elder family financial exploitation on family systems. Program Abstracts from the GSA 2018 Annual Scientific Meeting "The Purposes of Longer Lives", Innovation in Aging, Volume 2, Issue suppl_1, 1 November 2018, 680, https://doi.org/10.1093/geroni/igy023

Stum, M, M. Peterson, R. Kilaberia. (July, 2017). When It's Family: Examining Entitlement as a Risk Factor for Elder Financial Exploitation. Program Abstracts from the 21st International Association of Gerontology and Geriatrics (IAGG) World Congress, Innovation in Aging, Volume 1, Issue suppl_1, 1 July 2017, 845, https://doi.org/10.1093/geroni/igx009

Stum, M., Brisse, G., Jackson, M. (2014). What makes inheritance decisions fair for adult children and older parents: A procedural justice lens. The Gerontologist. 54(Supp 2), 213. doi:. http://www.cehd.umn.edu/fsos/projects/mnhcd.asp

Jackson, M., M. Stum, & G. Brisse. (2013). Applying vignette methodology to understand the meaning of fairness in family inheritance. The Gerontologist. 53(S1), 335-336. doi: 10.1093/geront/

Stum, M. (2013). Possessions and inheritance: Lessons from Who Gets Grandma's Yellow Pie Plate? The Gerontologist. 53(S1). 560. doi: 10.1093/geront/

Stum, M. S. & A. Matzek. (2009). Applying a decision making framework to examine influences on financial literacy: A case of employees and financing long term care risk management decisions. Improving financial literacy and reshaping financial behavior: Research papers and perspectives conference proceedings. 11-12. Networks Financial Institute and Indiana State University.

Matzek, A., B Jan McCulloch, and M. Stum (2008). A life course analysis of health care decision making among rural older women. The Gerontologist,

Knatterud, L., McKay, H., Stum, M., Totten, A. (2005). Minnesota's efforts to avert a Medicaid Crisis when boomers grow old. The Gerontologist. 45 (Special Issue II). 230.

Wachwithan, P., & M. Stum. (2002). Examining Intergenerational Resource Transfers. National Council on Family Relations Annual Conference Proceedings. Dallas, TX.

Stum, M. (2000). Training practitioners in the meaning and experience of Medicaid spend down. The Gerontologist, 40(Special Issue), 371.

Stum, M. & Frazer, M. (1998). Economic issues facing grandparents raising grandchildren. The Gerontologist, 38(Special Issue 1), 184.

Stum, M. (1998). Innovative strategies for outreach and education of grandparent caregivers and practitioners who serve them. The Gerontologist, 38(Special Issue 1), 264

Stum, M. (1996). Advance Care Planning Education: Assessing & Addressing Differences by Care Setting. The Gerontologist, 36(Special Issue 1), 156.

Stum, M. (1996). Advance Care Planning From a Multi-Cultural Perspective: Linking Research and Practice. The Gerontologist, 36(Special Issue 1), 156.

Frazer, M., & Stum, M. (1995). Family perceptions of distributive justice in financing long term care. The Gerontologist, 35(Special Issue 1), 199.

Stum, M., & Loupe, J. (1995). Advance care planning behavior: Insight from PSDA implementation and the theory of planned behavior. The Gerontologist, 35(Special Issue 1), 380.

Frazer, M., & Stum, M. (1994). Financing long term care: Issues of procedural justice for families. Proceedings, National Council on Family Relations Annual Conference. Minneapolis MN, 19.

Stum, M., & Tam, V. (1994). Surrogate medical treatment decision making: Are state policies family-centered? The Gerontologist, 34, 314.

Bauer, J., Webb, F., & Stum, M. (1993). Factors influencing the magnitude of income change of disabled elders. The Gerontologist, 33(1), 301.

Stum, J., & Webb, F. (1993). An improved measure of functional ability in later life. The Gerontologist, 33(1), 298.

Stum, M., & Goebel, K. (1993). Enhancing personal autonomy in health care: Ethical dilemmas and challenges. Proceedings, National Council on Family Relations Annual Conference, Baltimore MD, 85.

Webb, F., Bauer, J., Stum, M., & Delaney, P. (1993). Familial influences on functional ability in later life. Proceedings, National Council on Family Relations Annual Conference, Baltimore MD, 13.

Delaney, P., Stum, M., Bauer, J., & Webb, F. (1992). Catastrophic out-of-pocket home care expenditures for disabled elderly: Who's affected? The Gerontologist, 32, 235-236.

Stum, M., Bauer, J., & Delaney, P. (1992). Levels and predictors of out-of-pocket home care expenditures for disabled elderly. The Gerontologist, 32, 235.

Webb, F., Bauer, J., Stum, M., & Delaney, P. (1992). Financial satisfaction and work in rural families. Proceedings, National Council on Family Relations Annual Conference. Orlando FL, 74.

Bauer, J., Stum, M., & Delaney, P. (1991). Economic well-being of the elderly with functional limitations: Implications for policy development. Proceedings, Annual Conference National Council on Family Relations. Denver CO, 49.

Robbins, E., Stum, M., & Sarver, J. (1991). Family perceptions of nursing home quality of care. Gerontologist, 31, 35.

Stum, M., Delaney, P., & Bauer, J. (1991). Chronically disabled black elderly: Predicting economic well-being. Gerontologist, 31, 235.

Bell, L., Detzner, D., & Stum, M. (1990). Losing home and possessions: Disruption of continuity in the lives of elderly individuals. Gerontologist, 30, 73A.

Stum, M., Delaney, P., & Bauer, J. (1991). Economic well-being of black elderly with functional limitations. Abstracts of Research Presentations, American Home Economics Association Annual Conference. Minneapolis MN, 36.

Stum, M. (1990). Quality care in nursing homes: Family roles and perceptions. Gerontologist, 30, 72A.

Stum, M. (1989). Aging-in-place in subsidized housing: Are responses providing quality care for elderly consumers? Gerontologist, 29, 73A.

REFEREED PROCEEDINGS-ROUNDTABLES

Bauer, J., & Stum, M. (1991). Family resource management in developing countries: Future directions. Proceedings, American Council on Consumer Interests. Cincinnati OH, 117.

Stum, M. (1990). The generational equity debate. Proceedings, American Council on Consumer Interests. New Orleans LA, 292.

INVITED PRESENTATIONS

Stum, M. (March 10, 2018). Who Gets Grandma's Yellow Pie Plate? workshop. The Way Ahead: Planning for the End of Life. St. Johns on the Lake Spirituality and Aging Symposium. Milwaukee, WI.

Stum, M. (April, 2017). Families and Inheritance Research and Resources. Connecticut Bar Association, Estate and Probate Section. New Haven, CT.

Stum, M. (November, 2017). Engagement in the Human Sciences: A Family Economic and Gerontology Lens. Board on Human Sciences Celebrating Excellence Session. Association of Land grant Universities Annual Conference . Washington DC.

Stum, M. (March 30, 2016). Families and Inheritance: New and Proven Educational Resources and Strategies Webinar. Invited by Personal Finance eXtension Learn. Cooperative Extension eXtension. Recorded webinar. https://learn.extension.org/events/2533

Stum, M. (April 21, 2015). Families and Inheritance: From Research to Education. Kansas State University Extension train-the-trainer. Wichita, KS. (8 hour training)

Stum. M. (January 19, 2012). "Who Gets Grandma's Yellow Pie Plate? Caring Transitions national network. Webinar based training.

Stum, M. (February 9, 2008). "Who Gets Grandma's Yellow Pie Plate?" National Association of Senior Move Managers national conference. St. Louis, MO.

Stum, M. (April 6, 2007). "Critical conversations about financing long term care." Building a secure future for your long term care needs. Nationally available teleconference seminars (for professionals and public). University of Illinois Extension.

Stum, M. (2005). "Families and inheritance decision making" Michigan State University Extension Faculty Training. November 10. Lansing, MI.

"Financing Long Term Care: Improving Financial Literacy and Family Decision Making" June 15, 2005. University of Wisconsin. Wausau, WI.

"Can We Talk? Critical Conversations about Financial Security in Later Life" June 15, 2005. University of Wisconsin. Wausau, WI.

Stum, M. (April 7, 2006, November 17, 2005; February 13, 2005, Sept 30, 2004). "Critical conversations about financing long term care." Building a secure future for your long term care needs. Nationally available teleconference seminars (for professionals and public) University of Illinois Extension.

Stum, M. (June 25, 2004). "Long Term Care Insurance: A family decision-making lens." New insights from a decade of buyer/non-buyer research panel. Private long term care insurance conference. Financing long term care: policy, politics, and practice. Washington, D.C. Invited by U.S. Department of Health and Human Services, Office of Disability, Aging, and Long Term Care ASPE staff.

Stum, M. (February 24, 2004). "Critical Conversations About Financing Long Term Care: Tools to Help Families Communicate and Plan." Strengthening Families, Youth and Communities: Across the Lifespan national conference sponsored by Clemson University. Myrtle Beach, South Carolina.

Stum, M. (February 27, 2004). "Financing long term care and quality of life" Creating Optimum Quality of Life for the Future. South Carolina Association of Family and Consumer Sciences conference. Myrtle Beach, South Carolina.

Stum, M. (2003). Family Caregiving Continuum Conference. January, 2003. "Financial Issues for Family Caregivers" and "Educational Resources on Financial Issues for Family" (staff inservice with attendance from 3 states). Ames, IA.

Stum, M. (2000). "Financing Health Care for Seniors: Long Term Care Research and Education." Pre-conference for Eastern Family Economics-Resource Management Association (EFRMA). Champaign, IL. February 17, 2000.

Stum, M. (2000). "Who Gets Grandma's Yellow Pie Plate" Michigan State University Extension Faculty. Lansing, MI.

Stum, M. (1999). "Improving Knowledge and Skills Associated With Long Term Care Financing Behavior." American Council on Consumer Interests Annual Conference. Chicago, IL. March 27, 1999.

Stum, M. (1998). "Financing Long Term Care: Who Really Pays?" Department of Agriculture and Consumer Economics, University of Illinois—Champagne-Urbana. April 24, 1998.

Stum, M. (1997). Who Gets Grandma's Yellow Pie Plate? University of Wisconsin Cooperative Extension faculty. Staff training via tele-network (ETN).

Stum, M. (1997). Who Gets Grandma's Yellow Pie Plate? University of Illinois Cooperative Extension Service. Staff training via tele-network.

Goebel, K., & Stum, M. (1993). "Health Care Decision Making: Does It Consider Cultural Diversity?" Workshop at Groves Conference on Marriage and the Family. March, 1993

Stum, M., Goebel, K., & Jones. J. (1992). "Taking Control of Life and Death Health Care Decisions." American Home Economics Association Annual Conference. Denver CO.

Stum, M. (1992). "Family and Consumer Economics: Resources for an Aging Population." Summer Institute on Aging. Center on Rural Elderly, Columbia MO. June 2, 1992.

BOOK CHAPTER

Dolan, E. & M. Stum (2001). Economic security and financial management issues facing same-sex couples. In J. M. Lehmann (Ed). The gay and lesbian marriage and family reader (pp. 1-24). New York: Altschuler & Associates, Inc.

TEXTBOOK CONTRIBUTIONS

Stum, M. (2014). Who Gets Grandma's Yellow Pie Plate? *Working with Older Adults* (pp. 185-190). Society of Certified Senior Advisors.

Stum, M. (2014). Fairness in Legacy Decisions. *Working with Older Adults* (pp. 178-179). Society of Certified Senior Advisors.

BOOK REVIEWS

Stum, M. (2010). Aging families and caregiving by Qualls & Zarit (Eds). Journal of Women and Aging. 22(3), 234-236.

Stum, M. (2000). Impact Analysis for Program Evaluation. Journal of Consumer Affairs. 34(2), 371.

Stum, M. (1997). The economics of aging by J. Schulz, Journal of Consumer Affairs, 31(1), 181-184.

RESEARCH REPORTS

Stum, M. (2019). When it's family: Examining the meaning and experience of elder family financial exploitation. A report for study participants. 1-19. St. Paul, MN: University of Minnesota.

Stum, M. (2018). The Meaning and Experience of Elder Family Financial Exploitation: Overview of Selected Findings. Research Report. University of Minnesota.

North Central l Region Aging Network. (November 2017). North Central Region Aging Related Extension Survey Results. North Central Region Aging Network Leadership Team.

Stum, M., K. Anderson, H. Haberman, N. Rodrigues. (2005). Perceptions about financing long term care: A cohort perspective. University of Minnesota. (for Minnesota Dept of Human Services). On-line at www.dhs.state.mn.us (policy and research)

Stum, M., K. Anderson, H. Haberman, N. Rodrigues. (2005). Perceptions about financing long term care: A life course perspective. University of Minnesota. (for Minnesota Dept of Human Services). On-line at www.dhs.state.mn.us (policy and research)

Stum, M. (2005). Making decisions about financing long term care: The experiences of Minnesota couples. University of Minnesota. (for Minnesota Dept of Human Services). On-line at www.dhs.state.mn.us (policy and research)

Stum, M. (2005). Financing long term care: Examining family decision making to help inform policy and practice. University of Minnesota. (for Minnesota Dept of Human Services). On-line at www.dhs.state.mn.us (policy and research)

Stum, M., Zuiker, V., Pelletier, E., & L. Hope. (2001). To buy or not to buy: Examining long-term care insurance decision-making from the employee perspective. University of Minnesota..

Frazer, M., & M. Stum. (1998). Economic Issues Faced by Grandparents Raising Grandchildren. University of Minnesota Extension Service.

Maddock-Magistad, B., J. Bauer, M. Frazer, & M. Stum. (1998). Families on Food Stamps: Perspectives About Making Ends Meet. University of Minnesota Extension Service.

Stum, M., & N. Ross. (1996). The Patient Self-Determination Act: Implementation in Minnesota Hospitals, Nursing Homes & Home Care Agencies. Descriptive report. Department of Family Social Science. University of Minnesota.

Stum, M., & E. Brouwer. (1996). Financing Long Term Care: Dilemmas and Decisions Facing Elders, Family Members and Society. Descriptive report. Center for Urban and Regional Affairs. University of Minnesota.

Stum, M., & E. Brouwer. (1996). Medicaid and the challenge of paying for nursing home care. CURA Reporter, 26(1), 13-18. Center for Urban and Regional Affairs, University of Minnesota.

Stum, M., Frazer, M., Loupe, J., & Ross, N. (1995). Implementation of the Patient Self-Determination Act in Minnesota nursing homes. Descriptive report. Family Social Science, University of Minnesota.

Detzner, D., Stum, M., & Bell, L. (1990). Oak Ridge Manor Case Study. Family Social Science, University of Minnesota.

Stum, M. (1988). Housing Managers And Environments With Aging-In-Place Residents: Implications For Training And Development. Madison WI: Wisconsin Housing and Economic Development Authority.

Stum, M. (1977). A Review Of Consumer Relations Approaches In U.S. Businesses: Implications For Shell Oil Company. Houston TX: Shell Oil Company.

CONFERENCE PRESENTATIONS: NO PROCEEDINGS

Stum, M. (May, 2018). Changing the Culture of Underreporting Elder Family Financial Exploitation to Improve Health. National Health Outreach Conference: Minneapolis, MN.

Stum, M. (May 2017). When It's Family: Elder Financial Exploitation Risk and Protective Factors. National Health Outreach Conference: Annapolis, MD

Bates, J., M. Stum, Gerstenecker, C, Brown, L (May 2017). Exploration of Aging in the National Framework for Health and Wellness: The Educator's View. National Health Outreach Conference: Annapolis, MD

MacMahan, D., Siebers, T.& Stum, M. (March, 2017). The great divide: Helping families determine who gets what? National Association of Senior Move Managers National Conference: Indianapolis, IN

Emily Jordan & M. Stum. (2016, November). Families and Inheritance: Examining the meaning of fairness. National Council on Family Relations annual conference poster. Minneapolis, MN.

Stum, M. (2016, November). Elder family financial exploitation: Risk and protective factors. National Council on Family Relations annual conference poster. Minneapolis, MN.

Emily Jordan & M. Stum. (2016, September). Stepfamilies and inheritance: Examining the meaning of fair decisions. American Association of Marriage and Family Therapy annual conference. Indianapolis, IN.

Matzek, A. & Stum, M.S. (2010). Financial long term care decision making: Do spouses make a difference? National Council on Family Relations annual conference.

Matzek, A., & Stum, M.S. (2010). Couples managing the risk of financing long term care. Gerontological Society of America annual conference.

Knatterud, L., Stum, M. & J. Selstad. (2006). Financing long term care for Minnesota's baby boomers. American Society on Aging/National Council on Aging. March 16. Anaheim, CA.

Knatterud, K. & M. Stum. (August, 2005). Motivating Boomers to Plan for Retirement and Later Life. MN Department of Human Services Age Odyssey statewide conference. Duluth, MN.

Stum, M. (August, 2004). Long term care insurance: Are you financially literate? The Age Odyssey: A timeless journey. DHS and MN Board on Aging sponsored conference. St. Cloud, MN.

Stum, M. (2000, November). Critical family conversations about later life financial security. National Conference on Family Relations, Minneapolis, MN.

Stum, M. (1999, March). Critical conversations: Helping families communicate about later life financial security goals. American Society on Aging, Orlando, FL.

Stum, M. (1999, March). Determining what "fair" means: Family inheritance decision making. American Society on Aging, Orlando, FL.

Stum, M. (1998, March). Advance care planning: Educating staff to help others make informed decisions. American Society on Aging, San Francisco, CA.

Stum, M. (1998, March). Who gets grandma's yellow pie plate: Families and inheritance issues. American Society on Aging, San Francisco, CA.

Stum, M. (November, 1996). Improving the relevance of advance care planning for Native American and Hmong elderly. Symposium at The Gerontological Society of America Annual Conference. Washington, DC.

Stum, M. (September, 1996). Families and non-titled property transfers: What does research suggest? National Extension Association of Family and Consumer Sciences Annual Conference. Providence, Rhode Island.

Stum, M. (1990). Health Care Decision Making: A Family Approach to Dilemmas and Decisions. American Society on Aging Annual Conference. Idea Exchange (display and handouts). April 7, 1990. San Francisco CA.

Stum, M. (1990). Long Term Care Financing and Quality Educational Resources. American Society on Aging Annual Conference. Idea Exchange (display and handouts). April 8, 1990. San Francisco CA.

Stum, M. (1984). The Older Adult Learner: Implications for Programming. Outstanding Graduate Student paper presented at Annual Mid-America Congress on Aging Conference. Kansas City MO.

WORK IN PROGRESS

Kilberia, K & Stum, M. (2019). Submitted. It's a family matter: A case study of responding to elder family financial exploitation. The Gerontologist.

Stum, M., & E. Jordan. Families and fair inheritance decisions: Case conceptualization through the lens of theory, Revision for re-submission.

Stum, M. & M. Jackson. Applying Vignette Methods to Understand Fairness in Family Inheritance: What responses tell us about benefits and challenges. Revision for re-submission.

Chan, A. & Stum, M. In preparation. Elder family financial exploitation: A systematic review of theory use. To be submitted to Family Theory & Review.

Stum, M. In preparation: Families are never the same: The consequences of elder family financial exploitation. The Gerontologist.

Stum, M. & T. Kilaberia. In preparation: When It's Family: Examining Entitlement as a Risk Factor for Elder Financial Exploitation. Journal of Family and Economic Issues.

Stum, M. In preparation: Trying to do the right thing: Help seeking when faced with elder family financial exploitation. Journal of Elder Abuse and Neglect.

Betz-Hamilton, A. & M. Stum. In preparation. Elder family financial exploitation: Perspectives about perpetrator motivations. Journal of Elder Abuse and Neglect.

M. Stum & E. Jordan. In Preparation; Families and Inheritance Processes: What criteria matter? *Journal of Family and Economic Issues.*

Stum, M., Brisse, G. In Preparation; What Makes Inheritance Processes Fair? Examining congruence in older parent and adult child perspectives. *Family Relations*.

Stum, M., Brisse, G. In Preparation; Intergenerational Perceptions of What Makes Inheritance Processes Fair. *Family Relations*.

Stum, M. Focusing on aging in the National Health & Wellness Framework. To be submitted to Journal of Extension.

EDITORIAL AND RESEARCH REVIEW ACTIVITIES

Appointed Editorships

Journal of Family and Economic Issues, 2001-present
Editorial Board Member, Journal of Consumer Affairs, 1998-2011.
Journal of Consumer Education, Editorial Board Member, 2006-present

Manuscript Reviewer

Death Studies, 2018
Journal of Family and Economic Issues, 1997-present
Journal of Financial Counseling and Planning, 1996-present
Journal of Consumer Affairs, 1990-present
Medical Care Research and Review, 2015
The Forum for Family and Consumer Issues, 2014
Journal of Aging and Social Policy, 2010-2011
Advancing the Consumer Interest, 1995-2005
Journal of Aging and Health, 2009
Journal of Economic Psychology, 2008
Family Economics Review, 1990-1993
Journal of Marriage and Family, 1992-1993; 2004
Journal of Social and Personal Relationships, 2003
Gerontologist, 1990-1991

Review of Annual Conference Papers and Abstracts

American Council on Consumer Interests, 1991-2005
National Council of Family Relations, 1996
Association for Financial Counseling and Planning Education, 1991
Gerontological Society of America, 1993

INVITED PEER REVIEW

Evans, David. (2014). Dying without a will in Indiana. Purdue Extension publication.

Agricultural Experiment Station Multistate Regional Proposed Research Project Review. Elder Financial Exploitation topic. May 2012. (Northwest region)

<u>Guide to Long Term Care Insurance</u> publication review. Invited by Extension National Program Leader to serve as 1 of 3 extension faculty to review American Health Insurance Plans prepared publication. Review being conducted for Publication Services and Citizen Outreach Division of General Services Administration prior to decision on publication's inclusion in Federal Information Center. 2012-2013.

U.S. Federal Reserve Board of Governors. Division of Consumer and Community Affairs. Invited reviewer for planned survey of older Americans regarding aging friendliness of financial services.(October 2012)

Research-based educational resources: "Montana's long term care partnership program" Montana Extension service (M. Goetting author). 2012.

GRANTS

RESEARCH FUNDING AWARDED

AES INVESTMENT FUNDS (Family Social Science)
Project: When it's family: Examining the meaning of elder financial exploitation
Period: June 2016-August 2017
Amount: $38,899
Role: Principal Investigator

STATE OF MINNESOTA-DEPARTMENT OF HUMAN SERVICES (EXTERNAL)
Project: Perceptions about financing long term care: Cohort, life stage, and couple perspectives
Period: February 16, 2005-June 30, 2005
Amount: $25,000
Role: Principal Investigator

STATE OF MINNESOTA-DEPARTMENT OF HUMAN SERVICES (EXTERNAL)
Project: Financing long term care: Examining family decision making to help inform policy and practice.
Period: November 20, 2004 – February 28, 2005
Amount: $5,000
Role: Principal Investigator

CNA FINANCIAL CORPORATION (PRIVATE INDUSTRY EXTERNAL)
Project: Long Term Care Insurance Decision Making
Period: January 1, 2001 – December 31, 2001
Amount: $25,000
Role: Principal Investigator

CHE ECONOMIC DEVELOPMENT INITIATIVE (INTERNAL)

Project: Long term care financing research-based technology enhanced education: Addressing economic change issues of an aging population
Period: January 1, 2001 – May, 2002
Amount: $19,472
Role: Principal Investigator

USDA—FOOD STAMP EDUCATION PROGRAM (External funding through college)
Project: Across the Lifecycle: Stretching Food Dollars and Financial Management
Period: October 1, 1997 - September 30, 1998
Amount: $121,650 (for sub-project)
Role: Co-PI with Jean Bauer

USDA—FOOD STAMP EDUCATION PROGRAM (External funding through college)
Project: Linking Food, Family, Financial and Community Resources
Period: October 1, 1996 - September 30, 1997
Amount: $139,000 (for sub-project)
Role: Co-PI with Jean Bauer

MINNESOTA EXTENSION SERVICE INNOVATIVE GRANT
Project: Integrating Research, Practice and Outreach in Life and Death Health Care Decision Making Issues
Period: January 1994 - December 1996
Amount: $23,276
Role: Project Leader

CENTER FOR URBAN AND REGIONAL AFFAIRS
Project: The Context of Medicaid Estate Planning in Minnesota
Period: 1993 - 1994
Amount: $15,500
Role: Principal Investigator with Estelle Brouwer, Humphrey Institute and Minnesota Extension Service

COLLEGE OF HUMAN ECOLOGY
Project: The Context of Medicaid Estate Planning in Minnesota
Period: September 1993 - June 1994
Amount: $4,800 (25% Research Assistant)
Role: Principal Investigator with Estelle Brouwer, Humphrey Institute

MINNESOTA GRADUATE SCHOOL GRANT-IN-AID
Project: Elderly Family Economic Well-Being and Long Term Care
Period: 1990 - 1991
Amount: $8,500
Role: Principal Investigator

ALL UNIVERSITY COUNCIL ON AGING

Project: Quality of Nursing Home Life and Care: Family Members' Roles and Perceptions
Period: 1989 - 1990
Amount: $2,700
Role: Principal Investigator

Recent NIFA Approved Research Projects:

AGRICULTURAL EXPERIMENT STATION
Project: Examining Elder Family Financial Exploitation to Inform Prevention Education.
Period: 2017-2020
Amount: Variable--25% Research Assistant per semester
Role: Principal Investigator

NIFA-AGRICULTURAL EXPERIMENT STATION
Project: Elder Financial Exploitation: Family Risk and Protective Factors
Period: October 2017 to September 2022
Role: State Participant (9 multi-state PIs; Lead one of 3 sub-group projects.)

NIFA-AGRICULTURAL EXPERIMENT STATION
Project: Elder Financial Exploitation: Impact on Families (W2191)
Period: Joined multi-state project May 2016-17
Role: State Participant (9 multi-state PIs)

AGRICULTURAL EXPERIMENT STATION
Project: Families and inheritance: The meaning and experience of interpersonal justice.
Period: 2011-2014; 2014-2017
Amount: Variable--25% Research Assistant per semester
Role: Principal Investigator

AGRICULTURAL EXPERIMENT STATION
Project: Financing long term care and later life financial security: A family perspective
Period: 2006-2011 and 2001-2006
Amount: Variable--25% Research Assistant for one semester, supply dollars.
Role: Principal Investigator

OUTREACH FUNDING AWARDED

North Central Regional Center for Rural Development. 2016-17 Small Grant Program.(NIFA)
Project: North Central Region Aging Network Toolkit Development
Period: October 2017 to August 2019
Amount: $24,655
Role: Co-PI (with 10 state reps); Toolkit sub-committee task s(PI, Erin Yelland, KSU)

NORTH CENTRAL REGION HUMAN SCIENCE EXTENSION DIRECTORS
Project: North Central Region Aging Network (NCRAN)
Amount: $18,100
Period: June 2016 to May 2017.
Role: One of 11 regional extension faculty participants; UMN representative

UNIVERSITY OF MINNESOTEA FAMILY DEVELOPMENT EXTENSION CENTER
Project: Elder Familial Financial Exploitation
Period: September 2014 – December 30, 2015
Amount: $10,000
Role: Leader, in collaboration with 3 extension educators and community partners

USDA-CSREES Rural Health
Project: Planning for long term care: Increasing accessibility for rural older adults.
Period: October 2007-September 2008; Extended to September 2009.
Amount: $184,340
Role: Consultant: Develop web-based module on families and critical conversations
PI, Paul McNamara, University of Illinois.

E-SCHOLARSHIP FUND (former College of Human Ecology)
Project: Who Gets Grandma's Yellow Pie Plate Interactive Software
Period: 2007
Amount: $4136
Role: Principal faculty

UNIVERSITY OF MINNESOTA EXTENSION SERVICE
Project: Financial Security in Later Life: Reaching Employees at Work
Period: 2008-09 fiscal year
Amount: $33,600
Role: Principal Budget Developer and responsible for project outcomes

UNIVERSITY OF MINNESOTA EXTENSION SERVICE
Project: Financial Security in Later Life: Reaching Employees at Work
Period: 2006-07 fiscal year
Amount: $12,850
Role: Principal Budget Developer and Contact for Team

USDA-ECONOMIC AND COMMUNITY SYSTEMS (EXTERNAL)

Project: On-line Consumer Education: Improving Financial Literacy
Period: September 15, 2003 – September 14, 2004 (extended to 2005)
Amount: $6,000
Role: Principal Investigator

USDA-ECONOMIC AND COMMUNITY SYSTEMS (EXTERNAL)
Project: Technology Enhanced Education: Financial Security
Period: September 15, 2000 – September 14, 2002
Amount: $30,000
Role: Principal Investigator

UNIVERSITY OF MINNESOTA EXTENSION SERVICE –Strategic Investment Funding Family Development Capacity Area
Project: Financial Security in Later Life: Reaching Baby Boomers at Work
Period: January –December 2005
Amount: $14, 073
Role: Principal Contact

UNIVERSITY OF MINNESOTA EXTENSION SERVICE –Emerging Program Grants Family Development Capacity Area
Project: Financial Security in Later Life: Reaching Baby Boomers at Work
Period: February, 2003-December, 2004
Amount: $13, 230
Role: Principal Contact

NATIONAL INSTITUTE ON AGING
Project: Minnesota Training Grant in Aging (Training pre/post docs)
Period: 1997-2002
Role: Faculty mentor on multidisciplinary team (no salary involved)
PI: Robert Kane, School of Public Health

UNIVERSITY OF MINNESOTA EXTENSION SERVICE
Project: Vital Aging: Developing a Resilience Framework
Period: Fall 2001-Fall 2002
Amount: $25,060
Role: Marlene Stum and Diane Damerow, Co-Principal investigators

INSTITUTE FOR HEALTH SERVICES RESEARCH
Project: Minnesota Area Geriatric Education Center Training Grant
Period: 1/97 - 8/31/00
Amount: 5-8% faculty time/year
Role: Core faculty; PI—Robert Kane, School of Public Health

INSTITUTE FOR HEALTH SERVICES RESEARCH
Project: Minnesota Area Geriatric Education Center Training Grant
Period: 9/94 - 8/97

Amount: 5-8% faculty time/year
Role: Core faculty; PI—Robert Kane, School of Public Health

MINNESOTA EXTENSION SERVICE CREATIVE PROGRAM GRANTS
Project: Who Gets Grandma's Yellow Pie Plate: Transferring Assets of Elderly Minnesotans
Period: 1995 - 1997
Amount: $49,795
Role: Project Team Member, State Faculty; Grant Initiator, Writer & Manager

BUSH DIVERSITY GRANT
Project: Improving Relevance of Life and Death Health Care Decision Making Outreach
Period: 1995 - 1996
Amount: $3,000
Role: Principal Investigator

USDA: FOOD & CONSUMER SERVICES
Project: Financial Management as part of Food Nutrition Education Program Grant
Period: October - September 1995-96
Amount: 15% faculty time, graduate assistant, and supplies
Role: Co-responsibility with Jean Bauer

EXTENSION OUTREACH AND ENGAGEMENT

FAMILY FINANCIAL SECURITY AND LATER LIFE: A majority of my extension program development focuses on later life issues with which individuals and their family members must cope: a) intergenerational resource transfers/inheritance, b) financial security in later life, especially financing long term care, c) life and death health care decisions, and d) financial security for an aging population. My work is also addressing elder financial exploitation as an emerging issue. My approach to program development consistently includes: a) program development processes, b) curriculum, c) on-line media, d) programming resources, e) training extension faculty and helping professionals; f) community outreach (direct presentations to audiences), g) media outreach, and h) improving policy and practice.

Families and Inheritance

Every later life family is confronted with the transfer of resources when a family member moves or dies. The need to address this decision making issue was identified by extension educators listening to family members and attorneys as they struggled to make informed decisions about inheritance, especially the transfer of non-titled property. In response I was one of six statewide program development team members (1994) to initiate research and collaborate with stakeholders to develop conceptually sound educational resources and fill the nationwide void. A consumer workbook, video, educator's package, and website were developed to help families and professionals working with families make more informed decisions regarding the transfer of non-titled property. These educational resources address the following decision making issues: a) sensitivity of issue, b) identifying transfer goals, c) determining what "fair" means, d) identifying the meaning of objects, e) understanding distribution options and consequences, and f) addressing sources of conflict.

"Who Gets Grandma's Yellow Pie Plate?"™ has been recognized with five awards for team and program excellence at state, regional, and national levels (see Honors and Awards section). This educational program is used statewide in Minnesota, nationwide in all 50 states, and internationally in Canada. The demand for this topic continues after 20 years of existence.

Curriculum (i.e. print publications, videos, facilitator's guides, fact sheets)

Stum, M. (2015). Who Gets Grandma's Yellow Pie Plate? Workshop Facilitator's Toolkit. University of Minnesota. Includes Facilitator's Guide (Purpose of toolkit, history of program, a facilitator's getting prepared checklist, summary of research, tips for designing and conducting workshops, key terms, evaluation tools, references); PowerPoint Presentation and Notes; Participant Handout on CD.

Stum. M. (2013) Who Gets Grandma's Yellow Pie Plate? Educator's Power Point Presentation and Guide. University of Minnesota Extension (revision).

Stum. M. (2011). Who Gets Grandma's Yellow Pie Plate? Workbook. University of Minnesota Extension (revised workbook).

Stum, M. (1999 (revised), 1996). User's Guide. In Minnesota Extension Service. Who Gets Grandma's Yellow Pie Plate? Transferring non-titled property. Educator's Package. St. Paul: Minnesota Extension Service. University of Minnesota.

Stum, M. (1999 (revised),1996). Tips for Successful Teaching and Learning. In Minnesota Extension Service. Who Gets Grandma's Yellow Pie Plate? Transferring non-titled property. Educator's Package. St. Paul: Minnesota Extension Service. University of Minnesota.

Stum, M. (1999 (revised), 1996). What Does Research Suggest About Families and non-titled personal property inheritance. In Minnesota Extension Service. Who Gets Grandma's Yellow Pie Plate? Transferring non-titled property. Educator's Package. St. Paul: Minnesota Extension Service. University of Minnesota.

Stum, M & E. Russell. (1999 revised, 1996). Determine What Fair Means Teaching Guide. In Minnesota Extension Service. Who Gets Grandma's Yellow Pie Plate? Transferring non-titled property. Educator's Package. St. Paul: Minnesota Extension Service. University of Minnesota.

Stum, M. (1999 (revised), 1996). Families and personal property inheritance. In Minnesota Extension Service. Who Gets Grandma's Yellow Pie Plate?™ Consumer workbook (pp. 3-10). St. Paul: Minnesota Extension Service. University of Minnesota.

Stum, M., & C. Bubolz. (1999 (revised), 1996). Understanding the sensitivity of transferring personal property. In Minnesota Extension Service. Who Gets Grandma's Yellow Pie Plate?™ Consumer workbook (pp. 11-20). St. Paul: Minnesota Extension Service. University of Minnesota.

Stum, M. (1999 (revised), 1996). Determine what you want to accomplish. In Minnesota Extension Service. Who Gets Grandma's Yellow Pie Plate?™ Consumer publication (pp. 21-26). St. Paul: Minnesota Extension Service. University of Minnesota.

Stum, M. (1999 (revised), 1996). Determine what fair means. In Minnesota Extension Service. Who Gets Grandma's Yellow Pie Plate?™ Consumer workbook (pp. 27-29). St. Paul: Minnesota Extension Service. University of Minnesota.

Stum, M. (1999 (revised), 1996). Owners of non-titled property determine what fair means. In Minnesota Extension Service. Who Gets Grandma's Yellow Pie Plate?™ Consumer workbook (pp. 30-35). St. Paul: Minnesota Extension Service. University of Minnesota.

Stum, M. (1999 (revised), 1996). Potential receivers of non-titled property determine what fair means. In Minnesota Extension Service. Who Gets Grandma's Yellow Pie Plate?™ Consumer workbook (pp. 36-42). St. Paul: Minnesota Extension Service. University of Minnesota.

Stum, M. (1999 (revised), 1996). Identify special objects to transfer. In Minnesota Extension Service. Who Gets Grandma's Yellow Pie Plate?™ Consumer workbook (pp. 43-50). St. Paul: Minnesota Extension Service. University of Minnesota.

Stum, M., & Goetting, M. (1997). Who Gets Grandma's Yellow Pie Plate?™ Transferring Non-titled Property. Montana State University Extension Service. (Montguide RT 1907): Bozeman, MT.

Minnesota Extension Service. (1996). Who Gets Grandma's Yellow Pie Plate?™ 13 minute video. St. Paul: Minnesota Extension Service. University of Minnesota (script writer & development team member).

On-Line Media

Stum, M. (2019). Who Gets Grandma's Yellow Pie Plate? A video guide to passing on personal possessions. University of Minnesota Extension. https://extension.umn.edu/transferring-non-titled-property/who-gets-grandmas-yellow-pie-platetm-video

Stum, M. (2019). https://extension.umn.edu/transferring-property/transferring-non-titled-property Rewriting/restructuring 30+ webpages on extension website.

Stum, M. & J. Smith. (April 2018). Facing the great divide, and deciding who gets what inherited memories. 60 minute Redux #ProbateNavigated podcast. Reston, Virginia. https://www.reduxprobate.com/probatenavigatedpodcast/

Stum, M. (May 2016). Estate planning matters: Lessons from the unexpected death of Prince. University of Minnesota Extension. http://www.cehd.umn.edu/fsos/people/faculty/pdf/estateplanningmatters.pdf (fact sheet)

Stum, M. (2011). Who Gets Grandma's Yellow Pie Plate? Workbook CD. (Fillable PDF). University of Minnesota Extension.

Stum, M. (2013 revision, 2011 revision, 2001). Who Gets Grandma's Yellow Pie Plate? www.yellowpieplate.umn.edu. Educational and marketing focused website. Received 28,000 visits in 2003; 20,000 in Jan/Feb 2004 following Wall Street Journal article.

Programming Resources

Stum, M. (May 2016). Estate Planning Teachable Moments. Educational resources and strategies for Family Resilience extension educators. University of Minnesota Extension.

Stum, M. (2000). Who Gets Grandma's Yellow Pie Plate: An Introduction. PowerPoint presentation resource. University of Minnesota Extension Service.

University of Minnesota Extension Service. INFO-U: Script on "Who Gets Grandma's Yellow Pie Plate?"™ (1998)

Barber, S., & Stum, M. (1997). Who Gets Grandma's Yellow Pie Plate?™ Educational Display Contents. University of Minnesota Extension Service.

Training Extension Faculty

Who Gets Grandma's Yellow Pie Plate? Webinar. (May 11, 2018). North Central Region Aging Network (NCRAN). One hour. 68 extension educators/specialists from 9 states. Archived at ncran.org/learn.

Families and Inheritance: New and Proven Educational Resources and Strategies Webinar. Invited by Personal Finance eXtension Learn. Cooperative Extension eXtension. Recorded webinar. (March 30, 2016). https://learn.extension.org/events/2533

Families and Inheritance Research Update, Proven Educational Resources. Family Resiliency Extension Educators. University of Minnesota Extension. January 20th, 2016 (3 hour webinar; February 29th, 2016 2 hour webinar).

Michigan State University Extension faculty. One hour via conference call. December 15, 2015.

University of Minnesota new extension educators (Family Resiliency). Homework and four hour train the trainer. December 1, 2015. St. Paul, MN.

Kansas State University extension educators. Homework and 8-hour train the trainer. April 21, 2015. Wichita, KS.

University of Minnesota Extension Family Development Center. Four hour train the trainer. July 13, 2014. Chanhassen, MN.

Purdue University statewide extension faculty. (May 1, 2013). Three hour Webinar on research and programming.

Iowa State University Extension. (December, 2013) Adapting Research and Educational Tools. Phone conference with three Iowa extension educators working on statewide curriculum development.

University of Minnesota Financial Security in Later Life Extension Educators. Training homework and workshop. December 14, 2005. St. Paul, MN.

Michigan State University Extension Faculty. In-service training invited 6-hour workshop. November 10, 2005. Lansing, MI.

Family Resource Management Regional Extension Educators. Staff training via conference call. December 9, 2002.

Family Relations Regional Extension Educators. Staff training via conference call. June 19, 2002.

Michigan State University Extension Faculty. In-service training invited 6-hour workshop. March 7, 2000. Lansing, MI.

University of Wisconsin Cooperative Extension faculty. Staff training via tele-network (ETN). May 2, 1997.

University of Illinois Cooperative Extension Service. Staff training via tele-network. July 15, 1997.

Fall Aging Conference, Legacy: Souvenirs from a Lifetime. Minnesota Gerontological Society and Senior Workers Association. November 7, 1997. Brooklyn Center, MN.

Financial and Business Management Specialization. University of Minnesota Extension Service. St. Paul, MN. April 2, 1996.

Family Development Specialization. University of Minnesota Extension Service. St. Cloud, MN. October 19, 1996.

National Extension Association of Family and Consumer Sciences. Annual Conference, Providence, RI. September 18, 1996

University of North Dakota Extension Annual Conference. Fargo, ND. October 10, 1995

Training Helping Professionals

Who Gets Grandma’s Yellow Pie Plate? workshop. (March 10, 2018). The Way Ahead: Planning for the End of Life. St. Johns on the Lake Spirituality and Aging Symposium. Milwaukee, WI.

Who Gets Grandma's Yellow Pie Plate? Webinar training for Caring Transitions (national network of senior move managers). January 17, 2012.

Minnesota Hospice Association End-of-life Conference (May 16, 2007). "Who Gets Grandma's Yellow Pie Plate? " St. Cloud, MN.

Minnesota Council on Family Relations. "Who Gets Grandma's Yellow Pie Plate? Family connections across the lifespan: Intergenerational aging. April 22, 2004. St. Paul, MN.

Metropolitan Area Agency on Aging personnel. "Who Gets Grandma's Yellow Pie Plate?" St. Paul, MN. April 26, 2001.

Anoka County Senior Issues Network. "Who Gets Grandma's Yellow Pie Plate?" Anoka, MN. October 24, 2001.

National Association of Personal Financial Advisors (NAPFA). National Conference Invited Session. May 6, 2000. Minneapolis, MN.

Exhibit Booth at "2001: The Age Odyssey." Department of Human Services Aging Initiative and Minnesota Board on Aging. August 9-11, 1999. St. Cloud, MN.

Special Libraries Association Annual Conference. "Who Gets Grandma's Yellow Pie Plate?"™ With K. Maser. June 7, 1999. Legal and Education Division. Minneapolis, MN.

Minnesota Association of Probate Registrars 1998 Annual Conference. "Who Gets Grandma's Yellow Pie Plate?"™ (co-taught with Chuck Leifeld, County Educator). September 24, 1998. Breezy Point, MN.

American Council on Consumer Interests nationwide conference poster session. April, 1997. Salt Lake City, UT.

University of Minnesota Development Officers Meeting. Campus Club. November 7, 1996. Director of Trusts and Estates. University of Minnesota.

Community Outreach *typically a 1-2 hour invited workshop titled "Who Gets Grandma's Yellow Pie Plate?

Kadence Wealth Managers. Golden Valley, MN. April 30, 2019.

AIS Planning. St. Cloud, MN. April, 19, 2018.

UMN Alumni Association of St. Croix Valley. Stillwater, MN. April 24, 2018.

Gentle Transitions Senior Move Managers. Edina, MN. May 15, 2018.

Gentle Transitions Senior Move Managers. Woodbury, MN. May 17, 2018.

UMN Extension Retirees. St. Paul, MN. October 4, 2018.

South East Minneapolis Senior Association Recognition Event. September 22, 2016.

York Senior Housing Cooperative. February 24, 2015. Minneapolis, MN.

Osher Lifelong Leaning Institute. October 27, 2014. Minneapolis, MN.

First Presbyterian Church. White Bear Lake, MN. October 20, 2013.

Ecumen Four Seasons of Maplewood Assisted Living. Maplewood, MN. February 20, 2013.

Habitat for Humanity Leadership Group. June 12, 2012. Minneapolis, MN.

CEHD Saturday Scholars. Minneapolis, MN. November 1, 2011

Minnesota Hospital Association. March 2010. Brooklyn Park, MN.

Immanuel Lutheran Church. December 10, 2009. St. Paul, MN.

Cargill Corporation Family Friday. May 14,2004 Wayzata, MN.

Beta Sigma Phi Minnesota State Convention. October 13, 2001. Bloomington, MN.

Phi Upsilon Omicron Retirees Chapter. St. Paul, MN. October 18, 2001.

Merriam Park Senior Program. Annual Senior Mini-Conference. October 9, 2000. St. Paul, MN.

Department of Human Services, State of Minnesota. Six Interactive Video sites. September 14, 1999. Originated in St. Paul, MN.

Public Health Staff Association, University of Minnesota. March 3, 1998. Minneapolis, MN.

Cargill Retirees. April 7, 1998. Edina, MN.

College of Human Ecology, Civil Service Staff, January 23, 1997. St. Paul, MN.

Family Social Science Brown Bag Lunch. February 19, 1997. St. Paul, MN.

Farm Transfer Workshop. “Assessing Farm and Family Resources” and “Making It Work” components. Milaca MN. February 1, 1994.

“Estate Planning Is for Everybody.” Young Families Newsletter, Minnesota Extension Service. Fall, 1990.

Media Outreach

Stum, M. & B. Hagen-Jokela (May/June 2019). Why aren’t we talking? 30-31.. The Senior Reporter. (33(3). Duluth, MN: Harbour Centers Inc. http://theseniorreporter.org/issue/2019AprMay/HTML5/

How do you decide? Who will get your family heirlooms? Becky Hagen-Jokela & M. Stum (December 2018). Duluth Area Senior Reporter.

“When dividing assets: The little things matter”. New York Times. April 15, 2016. (http://www.nytimes.com/2016/04/16/your-money/when-dividing-assets-the-little-things-matter.html?_r=0

"10 ways to downsize your home without losing your mind". Country Living. August 8, 2016. http://www.countryliving.com/home-maintenance/organization/a39408/how-to-downsize/

"How to decide who get what when passing on family treasures". The Dallas Morning News. July 12, 2016. http://www.pressreader.com/usa/the-dallas-morning-news/20160712/282797830709488

"Take time to talk with family about estate planning and inheritance wishes" (May 4, 2016, Press Release statewide. University of Minnesota Extension.

Estate planning matters". 30 minute program available statewide. Acsess Minnesota. http://www.accessminnesotaonline.com/2016/06/01/estate-planning/ (taped May 2016)

"Head off squabbles among your heirs." Kiplinger. November, 2015. http://www.kiplinger.com/article/retirement/T021-C000-S004-head-off-squabbles-among-your-heirs.html?page=1

"Splitting Heirlooms." The Gloss. April, 2015 (pages 36-37). Monthly magazine. Dublin, Ireland. https://thegloss.ie/best-divide-heirlooms-not-family/

"How to build the best inheritance". Montreal Gazette. May 9, 2015.

"3 things we can learn from Robin Williams' estate battle. Money.com. February 4, 2015. Time.com/money.

"Avoiding strife over stuff." Top Producer. (January 2015). Farmjournal.com

"Who's getting the beach house? Tell your heirs now." Wall Street Journal marketwatch.com http://www.marketwatch.com/story/whos-getting-the-beach-house-tell-your-heirs-now-2014-10-09. (November 1, 2014).

"How to spare your heirs a battle over your estate.", Consumer Reports, http://www.consumerreports.org/cro/2014/04/avoid-family-estate-battle-after-you-die/index.htm. (April 2014).

"When Heirs Collide", Wall Street Journal http://online.wsj.com/articles/when-heirs-collide-1411749577?mod=WSJ. (September 26, 2014).

"Divvying up Mom's stuff after she's gone." CNNMoney.com. December 27, 2013. http://money.cnn.com/2013/12/01/pf/inheritance.moneymag/index.html?hpt=hp_t3

"The Pearls are Mine!" Wall Street Journal. February 4, 2012. http://online.wsj.com

"Collection challenge: Who gets what?" Minnesota Women's Press. 28(7), 16-17. July 2012.

“How to prevent family feuds over an ailing parent’s care.” Consumer Reports Money Adviser. October 2012, 6-7.

“Mom said it’s mine” Minneapolis Star Tribune. August 25, 2011.

“Bequest or burden?” Experience Life magazine. April 2011, pg. 76.

“Critical conversations about inheritance: Can we talk?” Midwest Caregiver magazine. January 2009. Pgs. 41-43.

“Advance planning can pre-empt inheritance squabbles” The Washington Times. November 9, 2008. www.washingtontimes.com.

“Who Gets Grandma’s Yellow Pie Plate?” www.MidwestCaregiver.com broadcast edition. Available Fall 2008 at http://midwestcaregiver.com/broadcast_edition.php

“Inheritance Feuds” Consumer Reports Money Advisor interview September 22, 2008.

“Inheriting Memories” Saturday Evening Post. May/June 2008.

“Homes and inheritance” Chicago Tribune. February 14, 2008 interview.

The Radio America network (www.redioamerica.org). Credit Union National Association’s Home and Family Finance program. “Who Gets Grandma’s Yellow Pie Plate?” Aired February, 2008. http://www.cuna.org/initiatives/hff_radio/archive.html

“The best advice of all time: 20 rules for success” Money Magazine, September, 2007. 89-96.

“Neat Site: Who Gets Grandma’s Yellow Pie Plate?” June 21, 2007. whathappensnow.com

“Who gets grandma’s ring?” How to pass along your possessions without causing family fights. Bottom Line/Personal. May 1, 2007. 7.

“How to keep peace among heirs” The Wall Street Journal online. April 18, 2007 (http://online.wsj.com/article/SB117684886105773185.html)

“Retire in Style: No matter when you start.” KARE 11 TV Extra feature. February 22, 2007. Retrievable at http://www.kare11.com/news/news_article.aspx?storyid=243946

“Inheritance can be taxing” Atlanta Cox News Service column ran nationwide in major papers. June 19, 2006. (e.g. Kansas City Star Solutions section (page D10).

“Divide your heirlooms, not your heirs” Kiplinger’s Retirement Report. March 2006 (13(3).

"Yours, Mine and Heirs" The New York Times, December 8, 2005. (nationwide)

"Leaving a legacy everyone can love" The New York Times Magazine. November 6, 2005. (nationwide).

"How and when to involve children in estate planning" October, 2005. Bloomberg Wealth Manager (national publication for financial advisors). Pages 59-66.

"Heir conditioning." AARP The Magazine. March/April, 2005. 48(2c), 20. (nationwide; claims largest popular press circulation)

"Sweating the Small Stuff" Money. February, 2005. 47-48. (nationwide)

"Heirlooms, yes, but without the looming heirs" The New York Times, October 24, 2004. (nationwide) https://www.nytimes.com/2004/10/24/business/yourmoney/heirlooms-yes-but-without-the-looming-heirs.html

"Moving a lifetime" Time online edition. June 28, 2004. (www.time.com/time/generations/article) (national)

"Who Gets Grandma's Yellow Pie Plate?" Work and family life. A nationwide monthly newsletter. May 2004. 18(5). Distributed by companies and other organizations to their employees and clients.

"Advice on the small stuff" Wall Street Journal Sunday. January 11, 2004. Column appearing on-line at wsj.com and in all major newspapers in U.S. (national)

"Advice on the small stuff" Wall Street Journal Sunday. January 25, 2004. Column appearing on-line at wsj.com and in all major newspapers in U.S. (follow-up column). (national)

"Heirs (not so) apparent" St. Paul Pioneer Press. September 14, 2003. F 1 & 6. (state)

"Family Feud." More. April, 2003. 76,78,84. (national)

"Who Gets the Stuff?" Time Magazine. January 20, 2003. A1-A3. (national)

"The Latest Twist on Family Feuds: You Left Sis More Money Than Me" Wall Street Journal. November 7, 2002 (page D1 or www.wsj.com) (national)

"Littlest items big headache for inheritors" November 17, 2002. The San Diego Union-Tribune. San Diego, CA. (state)

"In inheritance, the meek may not get much after all." February 21, 2000. U.S. News and World Report. (national)

"Who Gets Grandma's Yellow Pie Plate?" Take Note Television Program. April 14, 2000 (and reruns). Pennsylvania State Public Broadcasting. (state)

"End of Life: Inheritance," April 2, 1998. Morning Edition. National Public Radio. (3+ conversations, one hour in-studio interview at MPR.) (www.npr.org) (national)

"Plan ahead to avoid arguments over family heirlooms," October, 1998. Parent Care Advisor. Horsham, PA: LRP Publications. (4 pages in 12 page monthly newsletter, nationwide subscription).

"Who Gets Grandma's Yellow Pie Plate?"™ July/August, 1998. Aging Today (p. 11). San Francisco, CA: American Society on Aging. (national to members)

"Family Feuds," September 14, 1998. The Wall Street Journal Encore (p. 16). Atlanta, GA: The Wall Street Journal. (update.wsj.com) (national)

Financing Long Term Care

This program area uses a financial risk management and family decision making perspective to help increase financial literacy regarding financing of long term care for chronically ill elders. Objectives include helping elders and their family members plan in advance as well as cope with immediate decisions by: a) reducing misinformation about long term care risks, costs, and financial alternatives, b) understanding key planning steps involved in protecting later life financial health against long term care costs, c) sorting out expectations, goals and concerns regarding financial security goals, and d) recognizing barriers to planning in advance.

Curriculum (print publications, videos, facilitator's guides, fact sheets)

Stum, M. (2015). Critical conversations about financing long term care. University of Minnesota Extension. (revised Powerpoint presentation).

Stum, M. (2012). Financing long term care: Myths and Facts. University of Minnesota Extension. (revised factsheet).

Stum, M. (2012). Do you know the facts about who pays for long term care? University of Minnesota Extension. (revised educational quiz)

Stum, M. (2012). Critical conversations about financing long term care. University of Minnesota Extension. (revised Powerpoint and facilitator's guide educator's package).

Stum, M. (2007). Critical conversations About Financing long term care: A facilitator's guide. Financial Security in Later Life. Minnesota specific and nationwide versions. (2002 version for USDA National Initiative).

Stum, M. (2007). Critical conversations about financing long term care. PowerPoint presentation for consumers. Financial Security in Later Life. Minnesota specific and nationwide versions. (2002 version for USDA National Initiative.

Stum, M. (2007). Are you at risk of needing long term care? Worksheet.

Stum, M (2007). Critical conversations about financing long term care: Common myths and facts" fact sheet. Minnesota specific and nationwide versions.

Stum, M. (2007). Long term care risk management strategies: What right for your situation?" fact sheet. Minnesota specific and nationwide versions.

Stum, M. (2007). "Managing the risk of long term care: The financing puzzle pieces" fact sheet. Minnesota specific and nationwide versions.

Stum, M. (2002). Long term care: Do you know the facts? Financial Security in Later Life. USDA National Initiative. Quiz.

Stum, M. (2002). Long term care and your financial security: Sorting out myths and facts. Financial Security in Later Life. USDA National Initiative. Fact sheet.

Stum, M. (2002). Financing long term care: Alternatives and considerations. Financial Security in Later Life. USDA National Initiative. Fact sheet.

Stum, M. (2002). Identifying Financial Security Goals for Later Life: Can we talk? (for older parents). Financial Security in Later Life. USDA National Initiative. Worksheet.

Stum, M. (2002). Identifying Financial Security Goals for Later Life: Can we talk? (For adult children of later life parents. Financial Security in Later Life. USDA National Initiative. Worksheet.

Stum, M. (2000). "Who really pays?" In Adult children and aging parents: Conversations between generations. Iowa State University Extension Service. Iowa State University Curriculum.

Gates, R., & Stum, M. (1997). Prescription Drug Financial Coverage Options for Elderly Minnesotans. University of Minnesota Extension Service. Fact sheet.

Stum, M. (1997). Protecting Against Prescription Drug Costs: Strategies for Minnesota Seniors. University of Minnesota Extension Service. Fact sheet.

Stum, M. (1997). Paying for Prescription Drugs: Myths and Facts for Minnesota Seniors. University of Minnesota Extension Service. Fact sheet.

Stum, M. (1989). Avoiding insurance cons. St Paul MN: Minnesota Extension Service, University of Minnesota, HE-FS-3664, 2 page fact sheet. (12,000+ distributed)

Stum, M. (1989). Financing long-term care: Sorting out fact from myth. St Paul MN: Minnesota Extension Service, University of Minnesota, HE-FS-3665, 2 page fact sheet. (15,000+ distributed)

Stum, M. (1989). Searching for quality in home care. St Paul MN: Minnesota Extension Service, University of Minnesota, HE-FS-3666, 2 page fact sheet.

Stum, M. (1991). "Beyond Medicare: Making Informed Decisions About Medicare Supplement Policies." Teaching Packet (teaching guide, participant handouts and suggested activities)

Stum, M. (1989). "Long Term Care: What's Quality from the Consumer's Perspective?" Teaching Packet (objectives, suggested teaching activities and worksheets, overhead masters)

Stum, M. (1988). "Long Term Care: Do You Know the Facts." Teaching Packet (objectives, program content, suggested activities, overhead masters).

On-line Media

Stum, M. (2017-revised formats). How to identify financial security goals for later life. Online quiz,fact sheet) http://www.extension.umn.edu/family/live-healthy-live-well/healthy-futures/how-to-identify-financial-security-goals/

Stum, M (2017 revised content/format). Identify and address sources of conflict when making decisions about long term care. (fact sheet**).** http://www.extension.umn.edu/family/live-healthy-live-well/healthy-futures/identifying-conflict/

Stum, M. (2009). Critical Conversations about financing long term care. Invited module for University of Illinois Consumer and Family Economics Extension website (http://www.ace.illinois.edu/cfe/)

Stum, M. (2003-2015). Financing Long Term Care: A Resource Center for Families. www.financinglongtermcare.umn.edu. A website with 76 publications including fact sheets, planning tools, conversations starters, common questions/answers, family experiences, a 6 module on-line self study, and tools for educator's. Documents are in both on-line and PDF formats; and interactive/non-interactive formats to meet diverse learner needs. Averaged 19,700 visits/month for 2003-04; 30,375 visits from Jan-June, 2005.

Stum, M. (2002). Critical Conversations About Financing Long Term Care curriculum. Available at http://www.reeusda.gov/financialsecurity.

Programming Resources

Stum, M. (2004). "Welcome to Financing Long Term Care: A Resource Center for Families," Marketing brochure for use nationwide. Available at: http://www.csrees.usda.gov/nea/economics/fsll/edu_longterm.html

Stum, M. (2002). Critical conversations about financing long term care. PowerPoint presentation for consumers. Financial Security in Later Life. USDA National Initiative.

Stum, M. (2003). "Long term care financing" Info-U script. University of Minnesota Extension Service.

Stum, M. (August, 1993). Financially catastrophic health care expenses: Elders and home care. Minnesota Extension Service research newsletter.

Stum, M. (September, 1992). Economic well-being of noninstitutionalized elderly with functional limitations. Minnesota Extension Service research newsletter.

Training Extension Faculty

"Critical conversations about financing long term care" December 14, 2005. Homework and training session. Financial Security in Later Life extension educators. St. Paul, MN. University of Minnesota Extension Service.

"Financing Long Term Care: Improving Financial Literacy and Family Decision Making" June 15, 2005. University of Wisconsin. Wausau, WI.

"Critical Conversations About Financing Long Term Care: Tools to Help Families Communicate and Plan" February 24, 2004. Strengthening families and youth across the lifespan. Clemson University Extension Staff Development. Myrtle Beach, SC.

"Financing long term care: A decision-making center for families" January 29, 2004. Family Resource Management Area of Expertise Staff Development. St. Paul, MN.

"Financing long term care: A resource center for families" December 11, 2003. Financial Security in Later Life National Initiative Nationwide Satellite Downlink (now on streaming video).

"Financing long term care: A resource center for families" May 2003. www.reeusda.gov/financialsecurity (17 minute presentation using Xanadu software to train educators nationwide in purpose and use of new website)

"Financing long term care: A resource center for families" May 2003. www.reeusda.gov/financialsecurity (on-line publication to train educators nationwide in purpose, use, and marketing of new website)

"Financial Issues for Family Caregivers" January 14, 2003. Family Caregiving Continuum (staff in-service with attendance from 3 states). Iowa State University Extension. Ames, IA.

"Educational Resources on Financial Issues for Family Caregivers." January 15, 2003. Family Caregiving Continuum (staff in-service with attendance from 3 states). Iowa State University Extension. Ames, IA.

"Critical Conversations About Financing Long Term Care"(March 21, 2002). National Initiative Roll-out Conference for Financial Security in Later Life. Myrtle Beach, SC.

"Long Term Care Insurance: Improving Consumer Education" (March, 2002). National Initiative Roll-out Conference for Financial Security in Later Life. Myrtle Beach, SC.

"Long Term Care and Project 2030." (April 15, 1998). Financial and Business Management Specialization. St. Paul, MN.

"Can We Talk? Family Dilemmas and Decisions About later Life Financial Health." (October 6, 1998). UMES Annual Conference workshop. Duluth, MN.

"Why Should I Pay for Your Grandmother's Nursing Home Care?" Financial and Business Management Specialization Training. October 27, 1994. St Cloud MN.

"Long Term Care: An Update." Specialized Agent Training. St Paul MN. January, 1990.

"Long Term Care: What's Quality from the Consumer's Perspective." Aging Inservice. Minnesota Extension Service. February 16, 1989. St Paul MN.

"Risk Management and Long Term Care." Specialized Agent Training. St Paul MN. December 1, 1988.

Train the Trainer Sessions

"Project 2030: Long term health care financing." Strengthening your "H" Factors. University of Minnesota Extension Service (Metropolitan cluster). January 26, 1999. St. Paul, MN.

"Financing Long Term Care: Alternatives and Consequences." (September 29-30, 1998). Leader training sessions. Moorhead, Breckenridge, New York Mills, & Detroit Lakes.

"Financing Long Term Care: Alternatives and Consequences." (February 24, 1998). General public and home study leaders. Albert Lea and Faribault, MN.

"Health Care Protection Myths and Facts." Southeast Area Agency on Aging Health Care Protection Workshops. Summer, 1989. St Charles, Faribault, & Redwing MN.

Training Helping Professionals

"Long term care insurance: Are you financially literate? The Age Odyssey: A timeless journey. August 25, 2004. St. Cloud, MN. DHS and MN Board on Aging sponsored conference.

"Financing long term care: A resource center for families." Minneapolis Senior Workers Association. August 26, 2004.

"Financing long term care: On-line family resource center." The Age Odyssey: A timeless journey. August 25, 2004. St. Cloud, MN. DHS and MN Board on Aging conference.

"Financing long term care: A quality of life issue that shouldn't wait." Creating Optimum Quality of Life for the Future. South Carolina Association of Family and Consumer Sciences conference. February 27, 2004. Myrtle Beach, South Carolina.

"Long-term care insurance: Examining employee and couple decision making" 2001 College of Human Ecology Research Dialogue with V. Zuiker. May 17, 2001. St. Paul campus.

"Critical conversations about financing long-term care" Minnesota Association of Family and Consumer Sciences annual conference. Airport Hilton, Bloomington, MN. March 23, 2001. (repeated one-hour workshop)

"Financing Health Care for Seniors: Long Term Care Research and Education." Pre-conference for Eastern Family Economics – Resource Management Association (EFRMA). February 17, 2000. Champaign, IL. Multi-state audience. Involved six hours of training in research findings, critical educational concepts, and use of existing curriculum. Impact. Fifty professionals in seven additional states have improved capacity to design and implement research based programming to improve the financial literacy of elders and their family members regarding financing long term care.

Department of Human Services County Financial Workers, "Working with elderly clients and their family members" at Long Term Care/Elderly Waiver Training Summit. October 5 –6, 1999. Brainerd, MN (3 repeated workshop sessions).

Department of Human Services Aging Initiative and Minnesota Board on Aging, "Helping families communicate about later life financial goals" at 2001: The Age Odyssey conference. August 10, 1999. St. Cloud, MN.

"It's about more than money: Critical conversations about financing long term care." Summer Institute on Aging and Health. Minnesota Area Geriatric Center. June 24, 1999. St. Cloud, MN.

"Can we talk? Critical conversations about financial security in later life." North Star Regional Geriatric Education Center and Fargo-Moorhead Coalition of Service Providers to the Elderly. April 8, 1999. Moorhead, MN.

"Who's Really Paying? Family Member Perspectives on Long Term Care Financing." Minnesota Gerontological Society and MAGEC. Minneapolis, MN. May 8, 1997.

"Who's Really Paying? Family Member Perspectives on Long Term Care Financing." Minnesota Gerontological Society and MAGEC. Duluth, MN. September 9, 1997.

"Addressing Financing Issues: Paying for Prescription Drugs." Improved Patient Outcomes With Effective Use of Medications at Managing the Spectrum of Care for Older Persons MAGEC Summer Institute. June 25, 1997. Brooklyn Center, MN.

Improving Policy and Practice

MN Department of Human Services. Invited advisory group participant for Own Your Future state initiative addressing responsibility and options for financing long term care. March 2015-ongoing. St. Paul, MN.

MN Department of Human Services. Invited work group participant on LTC Clearinghouse, (June 15, 2014). St. Paul, MN.

State of Minnesota Dayton-Prettner Solon Administration Own Your Future Initiative. Invited member of 16 private/public person subgroup (I was only academic). To make recommendations on financing product availability for middle income households to help pay for long term care costs. Met monthly March through December 2013 to study and prepare report for Own Your Future Advisory Panel and state legislature (delivered January 2014)

Stum, M. (March 20, 2013). Financing long term care : Family Decision Making Realites (research summary). Own Your Future Product Availability Sub-Group (Dayton Administration Initiative). St. Paul, MN.

<u>Guide to Long Term Care Insurance</u> publication reviewer (2012-2013) Invited by Extension National Program Leader to serve as 1 of 3 extension faculty to review American Health Insurance Plans prepared publication (initial review and revision review involved). Review being conducted for Publication Services and Citizen Outreach Division of General Services Administration prior to decision on publication's inclusion in Federal Information Center. A partnership of NIFA, GSA, and AHIP

Invited technical Expert Panel member for U.S. Department of Health and Human Services. (2011-2012). Community Living Assistance Services and Supports (CLASS) program and National Clearinghouse for long term care information.

Montana Extension Service and State of Montana LTCI Partnership Program. Peer reviewer for "Long term care insurance partnership program in Montana" revised joint extension and state publication. May 2012.

Minnesota Citizens League. (2009). One of 20 invited participants in long term care financing workshop. August 25-25. St. Paul, MN.

Reverse Mortgages for Long-term Care Project. Research Advisory Panel invited member. National Council on Aging (B. Stucki, Project Manager). 2006.

“The future of financing long term care in Minnesota” Governor Pawlenty’s invited participant in dialogue with policymakers. November, 2005. Minneapolis, MN.

“Motivating Minnesota’s boomers to prepare the for financial risks of long term care” November 15, 2005. Care Providers Statewide Conference. Minneapolis, MN.

“Motivating Minnesota’s boomers to take action on long term care: New research.” September 30, 2005. St. Paul. Dept. of Human Services long term care public forums. St. Paul, MN. (http://www.dhs.state.us/main/grpi[s/aging/documents/pub/dhs_ed_025734.hcsp.

Senator Edward Kennedy’s Office (April, 2005). Responded to request for research on families and long term care decision making realities to support writing of long term care legislation. Identified my work through www.financinglongtermcare.umn.edu.

Financing of Long Term Care for Minnesota’s Baby Boomers. A report to the MN Legislature. January, 2005. MN Dept of Human Services. Research on family decision making and UMES educational resources on financing long term care and later life are referred to in recommendations. Impacting private and public collaborative efforts to help ensure Minnesotans take action to prepare for their retirement and later life.

“Financing long term care: What factors make a difference in family decision-making?” Long term care financing in the 21st century. DHS, State of MN conference. December 3, 2004.

“Long term care insurance: A family decision-making lens”. New insights from a decade of buyer/non-buyer research symposium. June 25, 2004. Washington, DC. Private LTCI conference. Financing long term care: policy, politics, and practice. Recruited by Hunter McKay, ASPE Project Officer, U.S. Health and Human Services, Office of Disability, Aging, and Long Term Care Policy.

Rumminger, M. J. (2002). Long-term care insurance: The buying decision. Group Perspectives. 12(3). CNA Financial Corporation. Chicago, IL. (nationwide newsletter for employees).

Koco, L. (June, 2002). Here's why employees buy group LTC. The National Underwriter Company. On-line newsletter (www.national underwriter.com)

"To buy or not to buy: Examining long-term care insurance decision making from the employee perspective" January 10, 2002. CNA Financial Corporation. Group Long Term Care Employees. Chicago, IL. (3 hour in service)

"To buy or not to buy: Long-term care insurance and state employee decision-making" Fact Sheet distributed to participants in CHE sponsored legislative events. October 15, 2002 and January, 2003.

Invited reviewer of two Health Insurance Association of America publications on long term care and health care financing for USDA in determining federal government distribution. October, 2002.

RFP Reviewer for "promotion of long term care insurance" legislative mandated study. Minnesota Department of Human Services. (1 of 3 reviewers). October, 2002.

"To buy or not to buy: Examining long-term care insurance decision making from the employee perspective" Public Employees Group Long-term care Insurance Advisory Committee. State of Minnesota. November 13, 2001. St. Paul, MN

"To buy or not to buy: Examining long-term care insurance decision making from the employee perspective" Minnesota Board on Aging-Employer Sponsored Long-term care insurance task force. December 7, 2001. St. Paul, MN.

Long-term care: Our Next National Crisis. (May 6-8, 2001). Invited participant in think tank sponsored by National Endowment for Financial Education (NEFE). Scottsdale, AZ. (one of 25 participants invited nationwide; only academic/researcher)

15th Private long term care insurance conference. Sponsored by Long term care insurance educational foundation. Miami, Florida. August 19-22, 2001.

Peopling Long Term Care Work Group. Invited member of University-wide initiative to examine issues of staffing and make recommendations. October, 2000 – 2001.

Long Term Care Initiative Work Group invited participant. Sponsored by State of Minnesota Department of Employee Relations to develop a long term care insurance product for public employees. 1998-1999

Assisted in planning and served as key facilitator for Department of Human Services—Project 2030 and University of Minnesota Extension Service co-sponsored event, "Preparing Employees for 2030." November 5, 1998. Minneapolis, MN. (invited roundtable for employers)

"Financing Long Term Care Educational Resource Assessment." (September 21, 1998). East Metro Seniors Agenda for Independent Living Project Team. South St. Paul, MN.

"Who's Really Paying? Family Member Perspectives on Long Term Care Financing." Minnesota Planning Department. September 18, 1997.

"Medicaid and the Challenge of Paying for Nursing Home Care." Public forum on nursing home care, "Who's Going To Pay?" Region 9 and Southeastern Minnesota Area Agency on Aging. July 17, 1996. Owatonna, MN.

Community Outreach

"Critical conversations about financing long term care." City of Richfield employees. December 9, 2015. Richfield, MN.

"Critical conversations about financing long term care." Wayne Caron Caregiving Center, St. Paul. April 2010.

"Can we talk? Critical conversations about financing long term care." Sept 30, 2004; February 13, 2005, April 6, 2005, April 6, 2006. Building a Secure Future for Your long term care needs nationally available teleconference seminar. University of Illinois Extension.

"To buy or not to buy: Long term care insurance and state employee decision-making. Fact sheet for legislators and decision-makers. College of Human Ecology. 2003.

Long-term care: Options, Costs, and Preparation. University of Nebraska-Lincoln. Co-instructor with Mary Ellen Rider. Online non-credit course offered 2003, Spring and Fall 2002; Spring and Fall, 2001. Audience: Home study groups. Assisted with reviewing course during development and participating in on-line discussions.

"Long term care insurance" October 23, 2002. Epsilon Sigma Phi (Extension retirees association). St. Cloud, MN.

"Long Term Care Financing: Is Insurance an Option?" October 24, 2002. Minnesota Association of Extension Educators. St. Cloud, MN.

"Can we talk? Critical conversations about financial security in later life." State of Minnesota Department of Human Services Employees. September 28, 1999. St. Paul, MN.

"Can we talk? Critical conversations about financial security in later life." State of Minnesota Department of Human Services Employees. Interactive video conference (three sites). May 27, 1999. Originated and on-site from St. Paul, MN.

"Can we talk? Critical conversations about financial security in later life." State of Minnesota Department of Human Services Employees. Interactive video conference (six sites). May 13, 1999. Originated and on-site from St. Paul, MN.

"Can we talk? Critical conversations about financial security in later life: Part I." State of Minnesota Department of Human Services Employees. May 13, 1999. St. Paul, MN.

"Can we talk? Critical conversations about financial security in later life: Part II." State of Minnesota Department of Human Services Employees. May 27, 1999. St. Paul, MN.

"Can we talk? Critical conversations about financial security in later life." University of Minnesota Employee Assistance Program Brown Bag Series. May 26, 1999. Minneapolis, MN.

"Can we talk? Critical conversations about financial security in later life." Annual Caregivers conference. April 7, 1999. Crookston, MN.

"Financial Health in Later Life." Options North Regional Event for Seniors. October 8, 1998. Duluth, MN.

"Myths and Facts About Financing Long Term Care." Senior Citizens Center. May 23, 1993. Alexandria MN.

"Health Care: Filling the Gaps Beyond Medicare." Senior Expo. May 8, 1992. Chaska MN.

"Aging: Financing Long Term Care for Yourself and Others." Anoka County Employees. May 21, 1991. Anoka, MN.

"She's Lived There All Her Life." Annual Institute of the Minnesota Board on Aging. June 8, 1989. St Cloud MN.

Media Outreach

"Critical conversations about paying for long term care". farm journal.com. Interview December, 2014.

"How to plan for long-term health care" Fox Business. March 6, 2012. www.foxbusiness.com.

"Breaking the silence: Initiating family conversations about financing long term care" Wellness Works. (Fall 2009). 4(1). Stum & Kelash. University of Minnesota.

"Taking care of aging parents, relatives" article in "Plan It-Retire Ready Toolkit" finlit.cunaorg/plan_it.html. Credit Union National Association. Interviewed May 9, 2008. Available June, 2008.

"Finding the right Rx for long-term health care costs. Fidelity Investor's Weekly (nationwide on-line newsletter). July 29, 2005.

"Long term care insurance" The Free Press. Mankato, MN. Your Money section. February, 2005. (local)

Long term care insurance in Minnesota. Minnesota Dept of Commerce. January 2005. (www.financinglongtermcare.umn.edu listed as resource). (state)

"What to ask for in a long term care insurance policy" The Bottom Line. April 2004. Bottom Line Publications. (national)

"Planning for later life NOW" Kaleidoscope. Spring 2004. College of Human Ecology. University of Minnesota.

"Study explores long-term care benefit options from employees' perspectives." May 28, 2002. Press release. CNA Financial Corporation. Chicago, IL. (national)

"Why can't we talk?" 2001. Consortium Connections. 10(1), 7 University of Minnesota Children, Youth and Family Consortium.

“Helping families communicate about later life finances”. (1999). Senior Spotlight. Minnesota Board on Aging bi-monthly newsletter. 28(6), 2-13. (state)

The Caregiver. (1999). Long term care financing details adapted from educational material by county educator. 9(3). Regional newsletter published by Northwest Regional Committee on Caregiving.

Financing Long Term Care Issues. Anoka County Today. Coon Rapids Cable TV. (10 minute segment). Taped June 23, 1998 (runs on/off continuously). (statewide)

“Redefining term ‘catastrophic’ redefines numbers of people affected.” (1998). Minnesota Science, 48(2).

Senior Citizens Will Need to Re-examine Health Care Coverage.” News release. Minnesota Extension Service. November, 1989. (statewide)

Long Term Care Financing Issues. (1989). KUOM, Minneapolis MN, one hour call-in radio show. (statewide)

Life and Death Health Care Decision Making

This statewide program has included training extension educators, practitioners in and health care service providers in the ethical and family policy issue of making autonomous decisions about life and death health care in the event of incapacity. Objectives have included helping individuals, family members, and professionals to: 1) gain an understanding of the complex ethical, medical, economic and policy issue; 2) develop personal perspectives regarding life and death health care dilemmas and decisions; 3) develop an understanding of advance care planning as a decision making process; 4) identify the myths and facts about advance care planning; 5) increase skills in communicating about the issue, and 6) keep up-to-date on public policies impacting advance care planning.

Educational resources have served as models across the region and nation. The self-study packet (1991) was approved as a North Central Regional Publication after review and acceptance by peers in twelve states. Five other states adapted the materials and educational approaches. These resources have also been utilized in three grant-supported research projects conducted by other researchers comparing the effectiveness of educational interventions.

IMPACT: The number of Health Care Directives distributed statewide since the 1998 policy change is unknown and not recorded. However, the Minnesota Board on Aging alone handled approximately 30,000 requests per year for a total of 100,000 from 1999-2001. When counting the major HMO’s and health care facilities distribution and website download access, it is estimated that over a million copies have reached Minnesotans.

Curriculum (i.e. print publications, videos, facilitator’s guides, fact sheets)

Stum, M. (2015). Minnesota Health Care Directives: Are you prepared? University of Minnesota Extension. (revised Powerpoint and facilitator's guide educator's package).

Stum, M. (2015). Advance Care Planning in Minnesota: Fact or Myth? University of Minnesota Extension (quiz and answers).

Stum, M. (2012). Minnesota Health Care Directives: Are you prepared? University of Minnesota Extension. (revised Powerpoint and facilitator's guide educator's package).

Stum, M. (1999). "The Minnesota Health Care Directive: Are you up-to-date?" Teaching Packet for professionals and extension educators (teaching outline, participant handouts, overhead masters, background reading in various formats)

Stum, M. (1996). Advance care planning: Strategies and tools for helping others. Minnesota Board on Aging and Minnesota Extension Service. St Paul MN. In-depth training manual for helping professionals.

Wisconsin Public Television. (1994). "When To Let Go: Understanding End of Life Decisions," 60 minute video. Advisory committee member.

Stum, M. (1992). Taking control of life and death health care decisions. St Paul MN: Minnesota Extension Service, University of Minnesota, slide/script set.

Stum, M. (1991). Taking control of life and death health care decisions. St Paul MN: Minnesota Extension Service, and North Central Regional Extension Publication #398, family-focused self-study packet.

Stum, M. (1991). Educator's guide: Taking control of life and death decisions. St Paul MN: Minnesota Extension Service, University of Minnesota, HE-BU-5638-S.

Stum, M. (1989). "Health Care Decision Making in Minnesota: The Jury's Still Out on Living Wills." Teaching Packet (objectives, content, activities, available resources)

Print and on-line media

Stum, M. (2015). A Minnesota Health Care Directive Planning FILLABLE PDF Toolkit. University of Minnesota Extension Service. http://www.cehd.umn.edu/fsos/projects/mnhcd.asp

Stum, M. (2015). A Minnesota Health Care Directive Planning Toolkit. (in Spanish) University of Minnesota Extension Service. http://www.cehd.umn.edu/fsos/projects/mnhcd.asp

Stum, M. (Ed.). Revised (2016). (1998 first edition). A Minnesota Health Care Directive Planning Toolkit. University of Minnesota Extension Service. . http://www.cehd.umn.edu/fsos/projects/mnhcd.asp

Programming Resources

Stum, M. (2003). The Minnesota Health Care Directive: Who needs one?" Info-U Script. University of Minnesota Extension Service.

Stum, M. (1996). Making informed life and death health care decisions. Minnesota Extension Service and Minnesota Board on Aging. St Paul MN.

Stum, M. (1990). "Health Care Decision Making Dilemmas and Decisions." Minnesota Extension Service. Display Unit. St Paul MN

Training Extension Faculty

Latino Financial Management Team. Family Resiliency Educators. University of Minnesota Extension. In-depth training on end-of-life decision making research and resources, and materials adaption to improve cultural relevance. 2016-2017. (September 7, November 9, December 7, ongoing)

Family Resiliency Extension Educators. University of Minnesota Extension. Six hours of train-the trainer and advance homework. November 9, 2015 and December 8, 2015. In-person and Webinar. St. Paul, MN.

University of Minnesota Extension Latino Financial Literacy Educators. End-of-life health care decision making: Improving cultural relevance. Conference call (June 9, 2009; in-person workshops October 13 and November 11, 2009, Mankato, MN.

"The Minnesota Health Care Directive" December 15, 2005. Financial Security in Later Life extension educator homework and training. St. Paul, MN. University of Minnesota.

"The New Minnesota Health Care Directive." April 22, 1999. Financial and Business Management Specialization Training. St. Paul, MN. University of Minnesota Extension Service.

"Advance Directives: Taking Control of Your Life." April 16, 1998. Well-Kept Secrets II Planning Community Care for the Elderly. Central Minnesota Council on Aging. St. Cloud, MN. (75 attendees)

Decision making capacity and estate planning." Financial and Business Management Specialization training. October 28, 1994. St Cloud MN.

"Self-Determination and Health Care: Advance Directives and Other Issues." Minnesota Geriatric Education Center regional workshops. Alexandria (April 13), Bemidji (April 14), Grand Rapids (April 15), 1992.

"Planning for Incapacity: Policy Trends and Implications for Educational Responses and Marketing." Specialized Agent Training. St Paul MN. November 13, 1991.

"Life and Death Health Care Decision Making." Specialized Agent Training. St Paul MN. January, 1990.

"Health Care Decision Making in Minnesota: The Jury's Still Out on Living Wills." Specialized Agent Training. St Paul MN. December 1, 1988.

Training Helping Professionals

"The Minnesota Health Care Directive" MN Senior Health Options Care Coordinators Training, February 4, 2004. Train the trainer resources utilized.

"Creating an Advance Directive in MN" Respecting Choices Organization and Community Advance Care Planning Course. February 9, 2004. Minneapolis, MN.

"Health Directive Policy Change in Minnesota." The Minnesota Hospice Organization. February 9, 2004. St. Paul, MN.

"Advance Health Care Directives: Train the Trainer" Minnesota Hospice Organization. May 1, 2001. St. Paul, MN. (3 hour workshop)

"Advance Health Care Directives" Deaf Hospice Volunteer Training. March 15, 2001. Minneapolis, MN.

"The right to control your health care decisions: Are you prepared?" Metro Area Hospices Volunteer Training. Woodwinds Hospital, Woodbury, MN. October 23, 2001. (3 hour workshop)

"The New Minnesota Health Care Directive: Are You Prepared?" May 7, 1999. Learning is for Life Regional Conference on Aging. CEU's. North Mankato, MN.

"Minnesota's New Health Care Directive: Implementation Challenges and Opportunities" with K. Boston. St. Cloud, MN. February 23, 1999. The Minnesota Board on Aging (CEU's).

"Advance Directives: Taking Control of Your Life." April 16, 1998. Well-Kept Secrets II Planning Community Care for the Elderly. Central Minnesota Council on Aging. St. Cloud, MN. (75 attendees)

"Patient Self-Determination Act Implementation in Minnesota." Zumbrota Senior Providers. Zumbrota, MN. April 17, 1996.

"Proven Educational Resources for Consumers and Providers." Northfield Senior Resources Council. Northfield, MN. April 17, 1996.

"Challenges in Educating Immigrant Populations About Advance Care Planning." Jewish Federation of Minneapolis. St. Louis Park, MN. April 23, 1996.

"Making Informed Life and Death Health Care Decisions: Strategies and Tools for Helping Others." Training sessions for approximately 556 community and health care based helping professionals. CEU's for nurses, social workers, and nursing home administrators:

Care Providers of Minnesota, Bloomington MN, March 11, 1997
North Star Regional Geriatric Education Center, Moorhead MN, March 20, 1997
Pine Haven Care Center, Pine Island MN, June 26, 1997
Heartland Regional Geriatric Education Center (4 sites in MN, 1996-1997)
Alzheimer's Association Annual Update Conference, St. Paul MN, June 11, 1996
Health Insurance Counselors Network (4 sites in MN, 1995)
Minnesota Board on Aging, Maplewood MN, October, 1995

Minnesota Social Service Association Annual Conference. “Living Wills and Family Decision Making.” Minneapolis MN. March 15, 1990

Improving Policy and Practice

Consulting with Blue Cross/Blue Shield regarding Health Care Directive forms and staff training regarding diverse cultures. MSHO Medical Director, Health Care Improvement Project Manager and Senior Public Programs Health Educator. Sept 9, 2006.

Invited member of End-of-Life Curriculum Task Force, University of Minnesota Center for Spirituality and Aging (November 1999-2000). Identification and development of core curriculum for undergraduates, graduates and continuing education in health sciences.

Department of Human Services Aging Initiative and Minnesota Board on Aging, “Minnesota’s New Health Care Directive: Implementation Realities and Challenges” at 2001: The Age Odyssey Conference. August 10, 1999. St. Cloud, MN.

“Health Care Directive Law, Model Forms, and Implementation.” October 5, 1998. Panel member. Summit on Implementing Minnesota’s New Health Care Directive Law. University of Minnesota—Center for Bioethics. Minneapolis, MN.

Leadership for Health Care Directive Educational Work Group composed of 11 attorneys, health care providers, and individuals with expertise in recently passed new Health Care Directive legislation (June-September, 1998). Developed suggested health care directive form, suggestions for completing, and educational resources for statewide use in response to policy change.

Invited Minnesota representative at American Medical Association and Robert Wood Johnson Foundation sponsored meeting to dialogue about advance care planning community and public education strategies across the U.S. Chicago, IL. October 25, 1996.

Invited participant in eight member Ad Hoc Task Force on Advance Directive Statutes in Minnesota to draft needed changes in state advance directive policies (1996-1997). Resulted in legislation introduced and hearings held.

Surrogate Decision Making Work Group: Participated in work group to consider need for surrogate policy changes in Minnesota. Contributed research summaries and findings from family perspective. June-August, 1997.

Worked with the Public Education Committees of sub-sections of the Minnesota Bar Association producing a “plain language” version of the Durable Power of Attorney for Health Care advance directive form in Minnesota (1996-1997).

Invited participant in ElderRights project of Minnesota Board on Aging and Minnesota Bar Association Elderlaw Public Education and Senior Issues Task force (1994-1996)

Stum, M. (1996). <u>Advance care planning in Minnesota: What is and what could be</u>? Summary and recommendations from an invitational working conference. St. Paul: Minnesota Extension Service, University of Minnesota.

"Advance Care Planning: What Is and What Could Be in Minnesota." September 21, 1995. A working invited conference. Fifty participants involved in a process of dialogue to learn about theory, research, and practice and identify critical priorities. Lead sponsor: Minnesota Extension Service in collaboration with five co-sponsors. Leadership: M. Stum. Proceedings. Earle Brown Center, University of Minnesota—St Paul.

Community Outreach

"Health Care Directives: Are you Prepared?" February 23, 2016. UM Minneapolis, University of Minnesota Retirees Association.

"The Minnesota Health Care Directive: Are you prepared?" November 3, 2015. City of Stillwater employees. Stillwater, MN.

"The Minnesota Health Care Directive: Are you prepared?" November 9, 2014. Presbyterian Church. White Bear Lake, MN.

"The Minnesota Health Care Directive: Are you prepared?" November 16, 2005. Stillwater Professional Business Women's Association. Stillwater, MN.

"End of Life Planning" April 16, 2002. Bethel College. St. Paul, MN.

Fairview MS Achievement Center Family Support Group. July 11, 2000. Minneapolis, MN.

"End-of –life decisions and the Minnesota Health Care Directive." September 23, 1999. Walker Methodist Care Center, Minneapolis, MN. Family Council.

"Health Care Directives" with R. Keppler & B. Fuller. March 18, 1999. University of Minnesota Employee Benefits. Originated in Minneapolis, MN with four interactive television sites.

"Advance Care Planning." Early Stage Support Group. Alzheimer's Association. (1998). Edina, MN.

"Making Informed Life and Death Health Care Decisions." Public education sessions reaching 670 seniors. Center for Healthy Aging, Allina Health Systems. Co-facilitator. (4 sites in MN, 1996)

"When To Let Go: Advance Directives for Health Care." Satellite downlink in 15 Minnesota sites reaching 142 participants. May 23, 1994. Videotape products utilized in training of professionals and individual consumers.

"Taking Control of Life and Death Health Care Decisions." Sunrise Methodist Church. October 16, 1994. Arden Hills MN.

"Taking Control of Life and Death Health Care Decisions." Annual Senior Conference keynote address. Willmar MN. May 21, 1992.

"Taking Control of Life and Death Health Care Decisions." University in the Community. Shakopee MN. May 14, 1991.

"Taking Control of Health Care Decision Making." American Association of Retired People's Regional Northwest Minnesota Training. August 22, 1990. Detroit Lakes MN.

"Health Care Decision Making Dilemmas and Decisions." County Extension Day on Campus (display/handouts). March 16, 1990. St Paul MN.

Media Outreach

"Make Your Wishes Known" Good Age. October 2005 Minneapolis, MN (state)

"U of MN Provides End-of-Life Guide" April 4, 2005. State-wide news-release.

"Minnesotans have end-of-life options" April 1, 2005. St. Paul Pioneer Press. St. Paul, MN.(state)

"Your choice" March 28, 2005. St. Paul Pioneer Press. St. Paul, MN. (state)

"Pay Dirt: What's in you what-if file?" March 24, 2005. Star-Tribune. Minneapolis, MN. (state)

"Health Care Directives" March 22, 2005. Star Tribune. Minneapolis, MN. (state)

"Care directive speaks when you can't" Minneapolis Star Tribune. January 3, 2004. Minneapolis, MN. (state)

"Last requests." July 27, 1999. St. Paul Pioneer Press (p. 8F). St. Paul, MN. (state)

"Five wishes helps outline care wanted when dying." July 14, 1999. Minneapolis Star Tribune. Minneapolis, MN. (state)

"What would your family do?" October, 1998. Good Age, p. 1, 4. St. Paul, MN: Amherst Wilder Foundation (free Twin Cities newspaper for older adults, their families and friends).

Financial Security for an Aging Population

Achieving financial security in later life rarely happens without planning, taking action in mid-life, and evaluating as changes occur. Most people need help making informed decisions and help navigating the many routes to later life financial security. Professionals and communities also need help building the capacity to address family economic issues of an aging population.

Elder Familial Financial Exploitation

Development of Programming

Conducting literature and curriculum reviews, and developing community partner collaborations. $10,000 awarded in response to proposal developed by self and 3 extension educators (June 1, 2014 - December 2015). Twelve team meetings to report and discuss progress in 2015. Leadership provided for preparing quarterly project reports. Twelve meetings with community collaborators (Peterson & Freeman) on prevention and curriculum projects.

Improving Policy and Practice

Elder Family Financial Exploitation Project Updates. MN Elder Justice Center Staff. December 5, 2016. St. Paul, MN.

Elder Family Financial Exploitation Research Advisory Group Meeting. September 20, 2016. MN Elder Justice Center. St. Paul, MN. (12 invited members).

Minnesota Elder Justice Center Partners. Mitchell-Hamline School of Law. St. Paul, MN. Active participant in monthly 2 hour sessions. 2013 to present.

World Elder Abuse Awareness Day. (June 15, 2016). Planning group member. (July 2015 to July 2016). UMN Continuing Education Center. St. Paul, MN (statewide professional development reaching 550 practitioners). (12 planning meetings+ working subgroups via email (exhibits co-chair).

World Elder Abuse Awareness Day (June 12, 2015), Planning Group member. (November 2014 - July 2015). (Professional development reaching 250 practitioners)

Engaging with community partners (Marit Peterson and Iris Freeman, Elder Justice Center Partners) on curriculum development needs and priorities

Training Practitioners

Stum, M. (February 1, 2019). Experiencing elder family financial exploitation: An insider perspective. Webinar (live and archived). North Central Region Aging Network (NCRAN). http://www.ncran.org/webinars/archive/

Stum, M. (June 5, 2019). Trying to do the right thing: How non-perpetrator family members experience intervention in elder family financial exploitation. Minnesota World Elder Abuse Awareness Day. Brooklyn Center, MN. MN Elder Justice Center.

Stum, M. (June 13, 2019). When it's family: Examining elder financial exploitation. Minnesota Courts Conservator Audit Review Professionals. Anoka, MN. Minnesota Courts.

Stum, M. (March 7, 2019). When it's family: Examining Elder financial exploitation. Minnesota Elder Justice Center Partners. St. Paul: MN. Minnesota Elder Justice Center.

Christine Courtney & M. Stum. (April 10, 2019). Incapacity Planning as prevention to elder family financial exploitation. Minnesota Elder Justice Center. Webinar.

"A view from inside: Experiencing family financial exploitation" (June 13, 2018). Presentation at MN World Elder Abuse Awareness Day (WEAD). MN Elder Justice Center. Brooklyn Center, MN.

“When It’s Family: Entitlement and Elder Financial Exploitation”. Elder Justice Center Partners Meeting invited presentation. September 9, 2016. Mitchell-Hamline School of Law. St. Paul, MN.

“What financial coaches need to know about elder family financial exploitation.” Axton Betz-Hamilton, Marlene Stum, Don Rudisuhle. Association of Financial Counseling and Planning. Invited webinar for AFSC/CFPB Financial Coaches. Webinar. July 28, 2016.

“When It’s Family: Entitlement and Elder Financial Exploitation”. World Elder Abuse Awareness Day. St. Paul, MN. June 15, 2016. (130+ attendees).

“When It’s Family: Barriers to Reporting Elder Familial Financial Exploitation” with Marit Peterson, JD. World Elder Abuse Day. June 12, 2015. St. Paul, MN. (95 attendees)

“Can we talk? Linking Financial Exploitation Practice and Research.” World Elder Abuse Day. June 12, 2015. St. Paul, MN. (35 attendees)

“When it’s Family Financial Exploitation: What’s Your Role?” Poster session at UMN Extension Annual Conference. October 5, 2015. (Stum, M., S. Powell, R. Hagen-Jokela). Bloomington, MN.

Elder Family Financial Exploitation Case Studies: Examining Reporting Barriers. Educational resource/worksheet. June 12, 2015. M. Peterson & M. Stum.

On-line Media
Stum, M.& E. McCann. (2017). Elder Family Financial Exploitation. Family Transitions Podcast (20 minutes). Military Families Learning Network.
https://militaryfamilies.extension.org/family-transitions/podcasts/

Curriculum/Teaching Materials
Stum, M. (May 2018). Elder Family Financial Exploitation Vignettes: What is the Role of Professionals? Training worksheet includes case studies and discussion questions.

Stum, M (2016); When It's Family: Entitlement and Family Financial Exploitation Literature Review 75 slide PowerPoint presentation for professional audiences.

Media Outreach

Stum, M. (2019). Lessons learned from elder family financial exploitation. *The Senior Reporter* (4th ed., vol. 33, pp. 32-33). Duluth, MN: Harbour Centers, Inc.. http://theseniorreporter.org/issue/2019JunJul/HTML5/

North Central Region Aging Network (NCRAN)

Leadership Team. Established April, 2017-ongoing. (11 extension professionals with aging expertise collaborating to enhance and increase aging-related capacity in region. Monthly e-meetings, funding proposals submitted/awarded, conducted regional needs assessment survey within Extension, website and toolkit development, training, and infusion is longer term goal

- Authorship Policies and Practices committee chair. Policies drafted and approved, Fall 2017.
- Program and resources inclusion committee member.
- Lead developer of an aging lens for the National Health and Wellness Framework (national conference panel presentation, manuscript in process).
- Participation in monthly Zoom meetings
- Participation in annual meetings
- Co-PI on awarded NIFA small grant project
- Publication and management of nran.org website (August 2018).
- Webinar and program and resources author
- Produce developed: ncran.org

Financial Security in Later Life
USDA Cooperative Extension National Initiative

Development of Programming

- Significant contributor to white paper that led to national initiative approval (last revised July, 2000).
- National Initiative Development Team Member Planning Session, April 17-19, 2001. Atlanta, GA
- National Initiative Management Team Member (2001-present)
- Chair, Research Framework and Educational Strategies Work Group (4 members)

Responsibilities:

*Developed research-based framework to identify key factors influencing financial security in later life.

*Supervised USDA intern in locating and summarizing key research and literature. Resulted in on-line annotated bibliography available at initiative website: http://www.reeusda.gov/financialsecurity/under Supporting Research.

*Identified key risk and protective factors from existing research, summarizing framework as background at initiative website under “framework” Introduced at March roll-out conference as conceptual foundation for the initiative.

*Developed key messages for consumers based on risk/protective factors research. Created key messages for consumers based on research and developed roadmap metaphor. Worked with USDA designers to develop central promotional brochure for the initiative (distributed in quantities nationwide by USDA).

*Lead author and leadership for developing core concepts and design for "Take the Road to Financial Security in Later Life" curriculum. Introduces key messages for initiative of plan, act and evaluate to achieve financial security. Curriculum includes facilitator's guide, PowerPoint presentation, 4 participant handouts. Introduced at March 2002 roll-out conference and utilized nationwide by educators. (4 total team members). Available at http://www.reeusda.gov/financial security in Program Toolkit for Educators.

- Member, Strategies and Framework workgroup (2004-present)

  *Lead author and developer of "Take the Road to Financial Security in Later Life" on-line self study option. Obtained external funding, re-conceptualized curriculum for on-line version, collaborated with graphic designer on website design and structure, created Breeze Live/PowerPoint recordings for all segments, created on-line interactive versions of worksheets. Leadership for marketing tool development for nationwide use.

  *FSLL as eXtension Prototype sub-group member. Primary contact for Take the Road self-study with USDA eXtension (January 2005-ongoing). Curriculum has been updated and technical changes are in progress (March, 2007).

- Nationwide Roll-Out Conference Planning Member. One of 5 committee members responsible for planning and carrying out conference attended by 240 participants from 46 states. March 20-23, 2002. Myrtle Beach, SC.

- Family Caregiving Across the Lifespan. An eXtension Community of Practice. One of 13 multidisciplinary and multi-state collaborators. 2006-08

Curriculum and On-line Media

Stum, M. J. Bechman & S. Knight. (2004). "Take the road to financial security in later life." An on-line self-study available at: http://www.csrees.usda.gov/nea/economics/fsll/cons_tools.html

Stum, M., J. Bechman, & S. Knight. (2002). "Take the Road to Financial Security in Later Life." A curriculum providing the framework for the Financial Security in Later Life Cooperative Extension National Initiative. Available at: http://fsos2.che.umn.edu/stum/ and at www.csrees.usda.gov/nea/economics/fsll/fsll/html/

Take the Road to Financial Security in Later Life Facilitator's Guide
Take the Road to Financial Security in Later Life PowerPoint presentation
Take the Road to Financial Security in Later Life: Are You Prepared? (worksheet)

Later Life and Financial Security: What's Beyond 60? (fact sheet)
Check Your Road Map to Financial Security in Later Life (checklist)
Take the Road to Financial Security in Later Life (brochure)
End of workshop and follow-up evaluation tools

Programming Resources

Stum, M. (2004). Take the road to financial security in later life: An on-line course to help you navigate. Marketing brochure and feature news article available at: http://www.csrees.usda.gov/nea/economics/fsll/edu_roadtofsll.html

Stum, M. (2003). How to Plan for Later Life Financial Security. Info-U script. University of Minnesota Extension Service.

Stum, M., S. Knight, J. Bechman, B. Rowe, S. Clarke. (2002). What do we know about financial security in later life? A research review. http://www.csrees.usda.gov/nea/economics/fsll/edu_framework.html

Training Extension Faculty

Stum, M. (March 2010). A life course lens. Center for Family Development Staff Development. Brainerd, MN. 150 participants. Evaluated.

Stum, M. (March 2010). Myths and Facts: Older adults and family ties. Center for Family Development Staff Development. Brainerd, MN. 150 participants. Evaluated.

"From research to reality: A roadmap to financial security in later life." December 15, 2005. Financial Security in Later Life Extension Educators. St. Paul, MN. University of Minnesota Extension Service.

"Can We Talk? Critical Conversations about Financial Security in Later Life" June 15, 2005. University of Wisconsin. Wausau, WI.

"Take the Road to Financial Security in Later Life: An on-line self-study" State Initiative contact conference call. Financial Security in Later Life National Initiative Team. October and November 2004.

"From Research to Reality: A Roadmap to Financial Security in Later Life." National Extension Roll-out conference for Financial Security in Later Life Initiative. March 20, 2002. Myrtle Beach, SC.

"Retirement and Financial Security." (1996). Collaborative conceptual development, organization of staff development resources, and training presentation for Financial and Business Management Specialization. April 2, 1996. St. Paul, MN. My role included developing teaching resources "Meaning of Retirement," "Myths and Facts About Retirement," "After Retirement: Educational Resources for Later Life," and "Staff Development Options."

Women's Financial Information Program In-service Training. MES Annual Conference. (1993).

Women's Financial Information Program In-service Training. St. Cloud, MN. (1992).

"Gaining Control Financially Through Life's Transitions." Family Economic Stability and Security Specialized Agent Training. St. Paul, MN. (1988).

Training Helping Professionals

"Financial Security in Later Life." M. Stum. Vital Aging Network. November 11, 2003. St. Paul, MN.

"Individual financial planning and supportive public policies: Critical elements for our future well-being. M. Stum, L Greenfield, & J. Hively. Minnesota Gerontological Society Spring Conference. April 11, 2003. St. Paul, MN.

"Take the Road to Financial Security in Later Life " M. Stum and S. Knight. November 22, 2002. AFCPE Annual Conference. Scottsdale, AZ.

"Aging and Economic Systems." Minnesota Association of Homes for the Aging Management Certification. Minneapolis, MN. April 28, 1993.

Community Outreach

Personal Finance Education for USDA Employees. April, 2006. Web-based learning tools included Take the Road to Financial Security in Later Life self-study, www.yellowpieplate.umn.edu, and www.financinglongtermcare.umn.edu.

NEFE Financial Literacy Resource Center at www.smartaboutmoney.org. Includes Who Gets Grandma's Yellow Pie Plate as only resource on inheritance. Established 2006.

Additional Prior Work:

Minnesota Area Geriatric Education Center (MAGEC). Core faculty involved in multidisciplinary efforts to train current and future professionals in gerontological concepts and issues (1995-2000). UMN-Center on Aging.

Community Forums on Aging. Initiation and leadership has been provided in the development of a community action model to challenge and empower communities to address issues of an aging population. Two-hundred community leaders participated in the initial forums in the four pilot counties. As a result of the forum process, each county now has an established Aging Coalition with community members working on task forces to address identified priority issues. (1990-1992)

Further training in the community action model in Extension and with Area Agencies on Aging staff has occurred. Written support materials have been prepared and personal consultation is being provided for counties across the state who wish to adapt the model. The project has been highlighted in <u>Extenovations</u> as an example of effective collaboration, cluster-wide programming with impact, and research linkages. <u>The Handbook on Building Eldercare Coalitions</u> published by the Department of Health and Human Services (1992) highlights the coalition experience as one of three successful models in the nation.

Grandparents Raising Grandchildren (1998).

Vital Aging and Aging as an Issue Program Leadership in Family Development (1988-1990, 2001-2004).

FAMILY ECONOMIC WELL-BEING ACROSS THE LIFESPAN

This secondary area of program development focuses on family economic well-being and financial security issues affecting varied family systems across the lifespan. Areas of curriculum development, training, and policy have included:

- Financial Management for Low Income Audiences (1995-1998)
- Financial Management for Women (1988-1996)
- Community Action to Build Strong Youth and Families (1991-1994)
- Health Care and Family Systems (1992)
- Consumer Issues Facing Minnesota Families (1988-1992)
- Work and Family Issues Eastern Caribbean Project (1988-1991)

RESIDENT TEACHING:

Guest Lectures (82 total in 7 different disciplines since 1988)

Undergraduate Senior Honor's Thesis. Nicole Limper, Family Social Science. May, 2012.

Minority Scholars Program Faculty Mentor (1990)

Rolando Martinez: Co-advisor on research project, "Economic Well-Being of Elderly: Race and Gender Differences." Paper and poster session resulting. University of Minnesota.

Formal Instruction as consultant

Working With Elderly (1 credit summer course for Marriage and Family Therapy master's students). Saint Mary's University of Minnesota. Minneapolis, Minnesota. July 11, 18, 25, 2008.

FORMAL INSTRUCTION PRIOR TO 1988, COURSE TITLES:

University of Wisconsin, Madison

Personal and Family Finance
Family Financial Counseling
Concepts of Decision Making in Management for Family Living
Orientation to Home Economics

Humboldt State University, Arcata CA

Family Finance
Consumer Action
Resource Management
Families and Public Policy
Current Issues in Home Economics

Housing
Research Methods in Home Economics
Household Equipment
Home Furnishings
Home Economist in Society

GRADUATE FACULTY ROLES/TEACHING:

DISSERTATIONS & THESES COMPLETED

Brisse, George. MA. (2015). Finding and making meaning in family caregiving. Stum, committee member.

Woosley, Angela. MA. (2014). The relationship between parents' end-of-life planning and adult children's end-of-life planning. Stum, committee member.

Matzek, Amanda. Ph.D. (2011). The impact of family and non-family roles on caregiver health over time. Stum, advisor.

Schaber, Patricia. PhD. (2004). <u>Family decision making: examining the decision context, process, and outcome when employees are offered long term care insurance</u>. Stum, advisor.

Wachwithan, Poonsuk. PhD. (2000). <u>Examining intergenerational resource transfers: The relevancy of individual and family characteristics and reciprocity concepts</u>. Stum, advisor.

Frazer, Monica A. MA. (1999). <u>Examining the experiences of grandparents raising grandchildren.</u> Stum, advisor.

Sarver, Janet M. MA. (1993). <u>The meaning of caregiving to families with members in nursing homes.</u> Stum, advisor.

Dixon, Celvia S. PhD. (1992). <u>Predictors of life satisfaction for elderly African-Americans</u>. Stum, advisor.

GRADUATE ADVISING

<u>PhD Degrees Completed</u>:

Family Social Science:

Melanie Jackson (2015)	Committee Member, Chair
Amanda Matzek (2011)	Dissertation Adviser
Nicola Rodriques	Committee Member, Chair
Christi McGeorge, 2005	Committee Member, Chair
Patricia Schaber, 2004	Dissertation Advisor
Diane Bartels, 2001	Committee Member

Poonsuk Wachwithan, 2000	Dissertation Advisor
Raksha Gates, 2000	Committee Member
Celvia Stovall Dixon, 1992	Dissertation Advisor
Elizabeth Robbins, 1998	Committee Member
Nicole Ross, 1998	Committee Member
Jane Tornatore, 1997	Committee Member
Janice Nadeau, 1993	Committee Member
Marla Muxen, 1990	Committee Member

Design, Housing and Apparel:

Laura Lien, 2010	Committee Member
Beth Schlagle, 1990	

Social Work:

Marilyn Frank, 1996	Committee Member

Masters Degrees Completed:

Family Social Science:

Angela Woosley, 2014	Committee member
Monica Schmitz Frazer, 1998	Thesis Adviser
Janet Sarver, 1993	Thesis Co-Adviser
Blong Xiong, 1996	Committee Member

Design Housing and Apparel	Committee Member
Victoria Kendall, 2004	

Vocational Education:	Committee Member
Peter Scheffert, 1996	Committee Member
Becky Williams	

Humphrey Institute:

Doris Calhoun, 1995	Committee Member

Applied Economics:

Ming Chen, 1996	Committee Member

Nursing

Jane Schmidt, 1997	Committee Member
Renee Doering, 1997	Committee Member

INFORMAL TEACHING AND ADVISING

Supervision of Research Assistants and Administrative Fellows (54 total since 1988)

MINOR PROGRAMS –GRADUATE FACULTY

Family Policy Minor Graduate Faculty member (2005-2011)

Multidisciplinary Family Policy course planning session. July 27, 2006.

Core faculty for Multidisciplinary Family Policy course (2006, 2007)

Gerontology Minor Graduate Faculty member (1989 to present)

University of Minnesota Courses Taught

FSos 8105, Family Gerontology. Spring 2010. 3-credit graduate course.

FSoS 8105, Family Gerontology. Spring 2008. 3-credit graduate course team taught with J. B. McCulloch.

SERVICE:

COMMITEES/WORK GROUPS/TASK FORCE

National

USDA National Initiative, Financial Security in Later Life Management Team 2000-2006

- Provided research, references, and proposal ideas for initial drafts of new initiative
- Reviewed and provided feedback on multiple drafts and in approval process
- Resulted in Financial Security in Later Life being named as new Extension initiative in Fall 2000 by ECOP.
- Chair, Research Framework and Educational Strategies Work Group (4 years)
- Chair, Development of Core Roadmap Curriculum work group
- Member, Roll-out conference planning work group
- Supervised Intern at USDA, Literature Review and Annotated Bibliography
- Member, Framework and Strategies Work Group (2004-05)

Financial Security eXtension work group and Community of Practice. 2004-2010

Family Caregiving Across the Lifespan. An eXtension Community of Practice. 2006-2010

USDA/Health Care Financing Administration Medicare Education Work Group 2000-2001

USDA Decisions for Health National Initiative 1993-1997
Minnesota Extension Service State Contact

Regional

North Central Region Aging Network Leadership Team 2016-present

North Central States Regional Research, Family Economics
Committee Member (NCR-52) 1989-1996
Chair 1994
Vice-Chair 1993
Secretary 1992

North Central Public Policy Committee 1995-2000
University of Minnesota Extension Service Family Policy representative

University

UMN Disabilities Committee Fall 2007

Graduate School Summer Research Fellowship committee	2006-2007
University Senate (one of two CHE elected representatives)	2000-2003
Graduate School Fellowship Committee	1999-2002
Search Committee, University Center on Aging	Spring 1995
St Paul Campus Library Committee	1990-1992

College of Human Development and Education

Honors and Awards	2019-2020
Promotion and Tenure	2013-2015 2011-2013
Ad hoc Policy Review & Format Pilot work group	Spring/Summer 2015
On-line Program Policies and Practices work group	Spring 2010
Graduate Curriculum Council (DGS representative)	2010
Governing Council (elected FSOS representative)	Fall 2012 2007-2008
Research Committee, member	2006-2007

College of Human Ecology

Policy and Planning, Chair	2002-2003
Member	2003-2005
Family Development Program Director Search committee, member	2004
Associate Dean Performance Review Committee Member	2000-01
Department of Design, Housing, & Apparel M. Bruin Mentor Committee Member	1999-2003
Honors & Awards	1992-1994
Chair	1993-1994

UROP (Undergraduate Research Opportunities Program) 1988-1990
Review Committee

Department of Design, Housing, & Apparel 1999
Search Committee Member (Extension Specialist in Housing)

Department of Family Social Science

Tenure/Tenure Track Annual Merit Review 2018-2020

Graduate Evaluation and Exam 2014-2018
Chair 2013-2014
Member

Graduate Student/Assistantship Funding committee 2018-2015; 2012-13

Tabitha Grier Reed P&T mentor committee member 2018

Tenure Faculty 4th year review 2018-2019

Family Finance Undergraduate Workgroup 2016-2017, 2020

Associate Professor 4-year review work group 2013- Ongoing

Dissertation Fellowship Pre-proposal reviews 2017

Cathy Solheim P&T mentor committee, member 2014-2016

Joyce Serido P&T mentor committee member 2015-2016

Jodi Dworkin , P&T mentor 2015-2016

Awards and Fellowships, Chair 2015--2013

Extension Financial Literacy Faculty Search, member 2013-2014

Ad hoc AES funding issues 2013-2015

Abi Gewirtz P&T mentor committee (Chair, member) 20083-2014

Families in Transition curriculum work group 2012-2014

Graduate Admissions, Chair 2013 -2014

Grievance Officer 2012 -2013

Acting Director of Graduate Studies	2011 -2012
Peer Review of Teaching Work Group, Chair	2011-2012
Post Tenure Review	2011-2012
Graduate Admissions	2009-2010 2011-2012
Graduate recruitment Strategic work group	2006-2010
FSOS Dissertation Fellowship application reviewer	2008-2009
CSREES Outreach and Engagement co-leadership with S. Axtel (report and response)	2008-2009
Colloquium Series for Faculty/Students (Academic year-Wednesdays)	2008-2009
Retirement Event Planning committee member (Hogan)	2007
Awards and fellowships committee, member	
Chair	2006-2007
Member	2001-2005 1990-1992 1988-1989
Department Head Consultative Committee	2000-2004 and 1993-1995
Extension Management Unit Chair	2001-2004 1999 1993-1995
Extension position search committee member (Family Relations)	2001-2002
Family Policy Signature Program Work Group (unofficial chair)	2003
Graduate Student Welcome Weekend Co-Chair	2002
Graduate Admissions	2005-2006 1995-1999
Chair	1997-1999
Ad hoc Post Tenure Review	1998-1999
Prelim & Evaluation Committee	1995-1996

Spring 1995

Department Chair Search Committee Member	1994-1995
Outreach Committee Chair	1992-1993
Diversity Task Force Chair Department Liaison	1993-1994
Financial Development	1993-1994

University of Minnesota Extension Service

Statewide

Extension Faculty Consultative Committee	2019-2021
Associate Dean Search	2007
Extension Faculty Consultative Committee	2003-2004
Dean and Director's Distinguished Extension Awards	2002
Family Resource Management Area of Expertise (co-chair)	2004
Pricing sub-group	2004-2005
USDA Awards Committee, member	2001-2002
Vital Aging Program Planning Committee Co-Chair	2000-2003
Vital Aging Working Group Member	2000
MES Citizens Advisory Board (state faculty representative)	1996-1998
Director's Planning Advisory Committee	1997-1998
Search Committee Member, Families That Work Director	1996
Financial & Business Management Specialization Leadership Team Chair, Staff Development Work Group (1995) Overall Leadership (1996)	1994-1996
Children, Youth & Family Leadership Team Responsible for Staff Development plan and action for Youth and Families At Risk Initiative (One week training, bi-monthly meetings, ongoing project responsibilities)	1992-1995
Advisory Board, Project Future Rural Health Care Project	1992-1994
Youth and Families At Risk Action Grant Selection Committee	1992
Waste Management Initiative Team	1991
USDA Future Scanning Network State Representative	1991
Multidisciplinary In service Development Waste Management, Food Safety and Water Quality Committee	1990-1991
Issues Team Award Selection Committee	1988-1989

Center for Family Development

Later Life Resource Decisions Business Planning Team, Chair 2016-2020

Staff Enrichment committee member 2019

Master Narratives Dialogue with FSOS specialists May/June 2019

Plan of Work Research Presentation Jan 2018

Master Narratives Workshop (with Serido, Dworkin & McGuire) March 2018
March Staff Development

July Staff Development Planning Group, member 2014

Environmental Scanning Task Force 2009-2010
(Design and develop interview processes, analysis, webinar trainings)

Aging Initiative Staff Development Planning Group 2009-2010

Aging Signature Initiative team 2010-2013

Home Economics/Human Ecology 1988-1990
Aging Implementation Team
Member of 8-person team to provide leadership for aging issue in state. Develop and implement priorities, evaluations, future program projections.
Subcommittees:
Status of Aging Families Databases, member
Co-Chair Aging Inservice
Community Leaders Forums on Aging, Chair

Program Development Management System (PDMS) 1989-1991
Specialist representative

Agent In service Program Development 1989-1991
Committee Member

PROFESSIONAL ORGANIZATION SERVICE AND MEMBERSHIP:

National

Gerontological Society of America (GSA) 1988-present
Social Research Planning and Policy Section Program Committee, member for 1993 annual conference

American Society on Aging (ASA) 1988-present

National Council of Family Relations	1990-present
Ruth Jewson Awards committee, member	2004-2008
Ruth Jewson Awards committee, Chair	2012
Association of Financial Counseling and Planning	2002-present
National Adult Protective Services Association	2013 to present
American Council on Consumer Interests (ACCI)	1997-2011
Nominations and Elections Committee member (elected position)	2005-2007
Board of Directors	1993-1996
Membership Survey Committee	1993-1994
<u>Advancing the Consumer Interest</u>, Journal Editor Selection Committee	1993
Future Directions Committee	
Chair	1992-present
Member	1991-1993
Membership Chair, State of Wisconsin	1983-1984
Initiated Student Chapter, University of Wisconsin	1983-1984
AHEA Family Economics and Home Management Pre-Conference	1990-1991
Local Arrangements Chair, Minneapolis MN	

PROFESSIONAL DEVELOPMENT (since 2005)

Minnesota Elder Justice Center Partners Meetings. Held first Friday afternoon of each month. Mitchell-Hamline School of Law. St. Paul, MN. January-December 2016-present.

Gerontology Society of America annual conference. Boston, MA. November 2018.

National Health Outreach annual conference. Minneapolis, MN. May 2018.

UMN Extension Annual Program Conference. Brooklyn Park, MN. October 1-2, 2018.

UMN Extension Annual Program Conference. Brooklyn Park, MN. October 11-12, 2017.

International World Congress of Gerontology and Geriatrics conference. San Francisco, CA. July 23-26, 2017.

Treks Transform course. College of Education and Human Development. June 9-10, 12-13, 2016. Minneapolis, MN.

National Council of Family Relations annual conference. Minneapolis, MN. November 2-5, 2016.

Family Development, University of Minnesota Extension. Poverty Staff Development. July 11, 2016. St. Paul, MN.

Conference/Professional Meeting Attendance, Association of Financial Counseling and Planning Education, Bellevue, Washington, United States. (November 19, 2014 - November 21, 2014).

Workshop, "Elder Financial Exploitation," East Metro Crime Prevention Program, St. Paul, Minnesota, United States. (June 5, 2014).

Applied for and received CEHD Program Officer Visit Award (used May 2013 to visit with NIH program officers in Washington, DC)

CEHD Mobile Treks training. July, 2013. (4 days). Minneapolis, MN campus.

National Adult Protective Services annual conference. St. Paul, MN. October 2 & 3, 2013

Adult Protective Services Summit on Financial Exploitation. St. Paul, MN. October 4, 2013.

Gerontological Society of America national conference attendance. November, 2013. New Orleans, LA.

Sabbatical January-June, 2013. Legal, financial, and policy issues facing later life family systems. Re-tooling and building multidisciplinary collaborations.

Gerontological Society of America Annual Conference. November, 2012. San Diego, CA.

Gerontological Society of America Annual Conference. November, 2011. Boston, MA.

Elder law Institute. Minnesota Bar Association Continuing Legal Education. November, 2010. Minneapolis, MN.

William Mitchel College of Law. ElderLaw Survey Class. K. Dayton. (audited). Fall semester, 2010.

Age Wave Conference.. MN Dept of Human Services. November 5, 2010. Brooklyn Park, MN.

Association of Financial Counseling, Planning & Education annual conference. Scottsdale, AZ. November 2009.

UMN Extension Center for Family Development Staff Development. December 3, 2009. St. Cloud, MN.

UMN Extension Annual Program Conference. October 5-7, 2009. St. Paul, MN.

Gerontology Society of America annual conference. November 2008. Baltimore Harbor, Maryland.

Write Winning Grants workshop. September 24, 2008. University of Minnesota.

Distance Teaching & Learning Conference. August 4-7, 2008. Madison, WI.

Rosella Qualey Professional Development Conference for Family Development. March 25, 2008. Otsego, MN.

Association of Financial Counseling and Planning Education Annual Conference. November 15-17, 2006. San Antonio, TX

American Society on Aging. March16-18, 2007. Anaheim, CA.

Gerontology Association of America Annual Conference. November, 2005. Orlando, FL.