

Terry Y. Lum
Curriculum Vitae

EDUCATION

- 1998 Doctor of Philosophy (PhD), Social Work
George Warren Brown School of Social Work, Washington University in St.
Louis, MO, USA
- 1993 Master of Social Work (MSW)
Department of Social Work and Social Administration
The University of Hong Kong, Hong Kong
- 1988 Bachelor of Social Sciences (BSocSc), Economics
The University of Hong Kong, Hong Kong

ACADEMIC APPOINTMENTS

After Joining The University of Hong Kong (2011-present)

- 2015 – pres Head, Department of Social Work and Social Administration, The University
of Hong Kong.
- 2015 – pres Professor, Department of Social Work and Social Administration, The
University of Hong Kong.
- 2015 – pres Henry G. Leong Professor of Social Work and Social Administration, The
University of Hong Kong.
- 2014 – 2015 Deputy Head, Department of Social Work and Social Administration, The
University of Hong Kong
- 2013 – 2014 Director of Master of Social Work Program, Department of Social work and
Social Administration, The University of Hong Kong
- 2011 – 2015 Associate Professor (with tenure), Department of Social Work and Social
Administration, The University of Hong Kong
- 2011– pres Director, Sau Po Center on Ageing, The University of Hong Kong

Before Joining The University of Hong Kong (1999-2011)

- 2005-2011 Associate Professor (with tenure), School of Social Work, University of
Minnesota, MN, USA

- 2009 Director of Graduate Studies, School of Social Work, University of Minnesota, MN, USA
- 2008 Director of Doctoral Program, School of Social Work, University of Minnesota, MN, USA
- 2007 – 2008 Visiting Associate Professor, Department of Social Work and Social Administration, The University of Hong Kong
- 1999 – 2005 Assistant Professor, School of Social Work, University of Minnesota, MN, USA

HONORS, AWARDS, RECOGNITIONS

Awards

- 2014 Best Article Award 2013, Journal of Ethnic & Culture Diversity in Social Work
 Danso, K. & Lum, T. (2013). Intergroup relations and predictors of immigrant experience. *Journal of Ethnic and Cultural Diversity in Social Work*, 22(1), 60-75. (Mr. Danso, K. was a doctoral student under my supervision at the University of Minnesota)
- 2014 Best Poster Award
 Wang J. & Lum T. (2014, Jun 6-7). *The challenge of dementia care in urban China – case example of Guangzhou*. Presented at International Alzheimer's Disease Conference 2014 in Hong Kong. (Ms. Wang is a doctoral student under my supervision)
- 2014 Faculty Knowledge Exchange Award, Faculty of Social Sciences, The University of Hong Kong (with Dr. Ernest Chiu and Dr. Vivian Lou)
 Project title: *Promoting Ageing-in-Place for Elderly Tenant in Rental Housing Estates of Hong Kong Housing Society* (related project: E16, related publication: A1)
- 2011 Elected Fellow, The Gerontological Society of America
- 2010 60th Anniversary Distinguished Alumni Award, Department of Social Work and Social Administration, The University of Hong Kong.
- 2001 The John A. Hartford Foundation Geriatric Social Work Faculty Scholar
- 2002 The Marie Wasie Elder Life Enhancement Award, Minnesota, USA
- 1996 Honorable mention, Best Student Paper Award, The American Public Health Association.

Paper title:

Lum, Y., & Chang, H. J. (1996, Nov). *Racial differences in utilization of health and community care services among older Americans*. Paper presented at the 124th Annual Meeting of the American Public Health Association. NY: New York City

1993 & 1994 William H. Beveridge Scholarship, Washington University in St. Louis, USA

1991 & 1992 Hong Kong Bank Scholarship, Department of Social Work and Social Administration, The University of Hong Kong

RESEARCH AND SCHOLARSHIP

A. Referred Journal Articles

Graduate student coauthor is underlined and post-doctoral fellow is indicated by asterisk (*) and research assistant professor by hash (#).

2016

- A.1 Tang J. Y. M.[#], Wong G. H. Y.[#], Ng C. K. M., Kwok D. T. S., Lee M. N. Y., Dai, D. L. K., & **Lum T. Y. S.** (2016). Time to an assessment service and cognitive deficits for people seeking help for cognitive concerns. *Journal of American Geriatric Society*.
- A.2 Lightfoot, E., Simmelinck, J., & **Lum, T. Y. S.** (2016). Cultural health assets of Somali and Oromo immigrants in Minnesota: Findings from a community-based participatory research project. *Journal of Health Care for the Poor and Underserved*, 27(1). 252-260.

2015

- A.3 Luo H., Lum T., Wong G. H. Y., Kwan J. S. K., Tang J. Y. M., Chi T. (2015). Predicting Adverse Health Outcomes in Nursing Homes: A 9-Year Longitudinal Study and Validation of the Frail-NH Quick Screening Tool Using Minimum Data Set. *Journal of the American Medical Directors Association* 16(12), 1042-1047.
- A.4 Luo, H., Wong, G. H. Y., **Lum, T. Y.**; Luo, M., Gong, C., & Kendig, H. (2015). Health Expectancies in Adults Aged 50 Years or Older in China. *Journal of Aging and Health*.
- A.5 Lu N., Lum TYS, & Lou VWQ (2015). The impacts of community social capital on the life satisfaction of older adults in Hong Kong: the moderator role of intergenerational family capital. *Aging and Mental Health*.
- A.6 Lou H.^{*}, Tang J. M. Y.[#], Wong H. Y. G.[#], Chen C. C. H., **Lum T. Y. S.**, & Lou V. Q. Q. (2015). The Effect of Depressive Symptoms and Antidepressant Use on Subsequent

Physical Decline and Number of Hospitalizations in Nursing Home Residents: a Nine-Year Longitudinal Study. *Journal of the American Medical Directors Association*.

- A.7 Tang, J. Y. M. #, Ho, A. H. Y., Luo, H., Wong, G. H. Y. #, Lau, B. H. P., **Lum, T. Y. S.**, & Cheung, K. S. L. (2015). Validating a Cantonese short version of the Zarit Burden Interview (CZBI-Short) for dementia caregivers. *Aging & Mental Health*, (ahead-of-print), 1-6.
- A.8 **Lum, T. Y. S.**, Yan, E. C. W., Ho, A. H. Y.#, Wong, G. H. Y.#, Shum, M. H. Y., & Lau, M. M. Y. (2015). Measuring filial piety in the twenty-first century: Development and validation of the Contemporary Filial Piety (CFPS-10) Scale. *Journal of Applied Gerontology*.
- A.9 Chen, Y. Y.*, Wong, G. H. Y.#, **Lum, T. Y. S.**, Lou, V. Q., Ho, A. H. Y.#, & Tong, T. L.W. (2015). Neighborhood support network, perceived walkability to community facilities and depressive symptoms among low-income Chinese elders. *Journal of Aging and Mental Health*.

2014

- A.10 **Lum, T. Y.**, Lou, V. W. Q., Chen, Y. Y.*, Wong, G. H. Y.#, Luo, H.*, & Tong, T. L. (2014). Neighborhood support and aging in place preference among low-income elder Chinese city-dwellers. *Journal of Gerontology: Social Sciences*.
- A.11 Wong, G. H. Y.#, Ng, C. K. M., Lai, C., Lee, M., **Lum, T. Y.**, Nan, J., Shie, H. W. H., Wu J. Y. M., & Dai, D. L. K. (2014). A cultural framework for integrated intervention in dementia: The Six Arts model. *The Gerontologist*.
- A.12 Chou, K. L., Yu, K. M., Chan, W. S., Chan, A. C., Lum, T. Y., & Zhu, A. Y. (2014). Social and psychological barriers to private retirement savings in Hong Kong. *Journal of aging & social policy*, 26(4), 308-323.
- A.13 Wysocki, A., Kane, R. L., Golberstein, E., Dowd, B., **Lum, T. Y.**, & Shippee, T. P. (2014). The association between long-Term care setting and potentially preventable hospitalizations among older dual eligibles. *Health Services Research*, 49(3), 778-797.
- A.14 Wysocki, A., Kane, R. L., Dowd, B., Golberstein, E., **Lum, T. Y.**, & Shippee T.P. (2014). Hospitalization of Elderly Medicaid Long-term Care Users Who Transition from Nursing Homes, *Journal of the American Geriatric Society*, 62, 71-78.
- A.15 Lightfoot, E., McCleary, J. S. & **Lum, T.** (2014). Asset mapping as a research tool for community-based participatory research in social work. *Social Work Research*, 38(1), 59-64.

2013

- A.16 Kane, R. L., Wysocki, A., Parashuram, S., Shippee, T., & **Lum T.Y.** (2013). Effect of long-term care use on Medicare and Medicaid Expenditures for dually eligible and non-dual eligible elderly beneficiaries. *Medicare and Medicaid Research Review*, 3(3) E1- E20. <http://dx.doi.org/10.5600/mmrr.003.03.a05>
- A.17 **Lum, T. Y.** (2013). Advancing research on productive aging activities in greater Chinese societies. *Aging International*, 38(2), 171-178.
- A.18 Wang, X., & **Lum, T.** (2013). Role of the professional helpers in disaster intervention: Examples from the Wenchuan earthquake in China. *Journal of Social Work in Disability and Rehabilitation*, 12, 1-2, 116-129.
- A.19 Cheng, S. T., **Lum, T.**, Lam, L. C. W., & Fung, H. H. (2013). Hong Kong: Embracing a fast aging society with limited welfare. *The Gerontologist*, 53(4), 527-533
- A.20 Danso, K., & **Lum, T.** (2013). Intergroup relations and predictors of immigrant experience. *Journal of Ethnic and Cultural Diversity in Social Work*, 22(1), 60-75
- A.21 **Lum, T. Y.**, Parashuram, S., Shippee, T., Wysocki, A., Shippee, N. D., Homyak, P., & Kane, R. (2013). Diagnosed prevalence and health care expenditures of mental health disorders among dual eligible older people. *The Gerontologist*, 53(2), 334-344
- A.22 Kane, R. L., **Lum, T. Y.**, Kane, R., Homyak, P., Parashuram, S., & Wysocki, A. (2013). Does home- and community-based care affect nursing home use? *Journal of Aging & Social Policy*, 25(2), 146-160
- A.23 Simmelinck, J., Lightfoot, E., Dube, A., Blevins, J. & **Lum, T.** (2013). Understanding the health beliefs and practices of East African refugees. *American Journal of Health Behavior*, 37, 155-161

1996 - 2010 (before joining HKU)

- A.24 Lee, H. Y., Lytle, K., Yang, P. N. & **Lum, T. Y.** (2010). Mental health literacy in Hmong and Cambodian elderly refugees: A barrier to understanding, recognizing, and responding to depression. *International Journal of Aging and Human Development*, 71(4), 323-344
- A.25 **Lum, T.Y.**, & Vanderaa, J. P. (2010). Health disparities among immigrant and non-immigrant elders: The association of acculturation and education. *Journal of Immigrant and Minority Health*, 12(5), 743-753
- A.26 **Lum, T. Y.**, Kane, R. A., Cutler L. J., & Yu, T-C. (2008). Effects of Green House® nursing homes on residents' families. *Health Care Financing Review*, 30(2), 35-51.

- A.27 Kane, R. A., **Lum, T.Y.**, Cutler, L. J., Degenholtz, H. B., & Yu, T-C. (2007). Resident outcomes in small-house nursing homes: A longitudinal evaluation of the initial Green House Program. *Journal of the American Geriatrics Society*, 55, 832-839.
- A.28 Lightfoot, E. & **Lum, T. Y.** (2006). Work behavior of older people with disabilities in the era of the Americans with Disabilities Act. *Journal of Social Services Research*, 32(4): 171-191
- A.29 Lin, W-C., **Lum, T. Y.**, Mehr, D. R., & Kane, R. L. (2006). Measuring pain presence and intensity in nursing home residents. *Journal of the American Medical Directors Association*, 7(3): 147-153
- A.30 Kane, R. L., Homyak, P., Bershady, B., **Lum, T.**, Flood, S. & Zhang, H. (2005). The quality of care under a managed-care program for dual eligibles. *The Gerontologist*, 45, 496-504
- A.31 **Lum, T. Y.** (2005). Understanding the racial and ethnic differences in caregiving arrangements. *Journal of Gerontological Social Work*, 45(4), 3-20
- A.32 Ozawa, N.M., & **Lum, T.Y.** (2005). Men who work at age 70 or older. *Journal of Gerontological Social Work*, 45(4), 39-61
- A.33 **Lum, T. Y.**, & Lightfoot, E. (2005). Effects of volunteering on the physical and mental health of older people. *Research on Aging*, 27(1), 31-55
- A.34 **Lum, T. Y.**, Lin, W-C., & Kane, R. L. (2005). Use of proxy respondents and accuracy of Minimum Data Set assessments of activities of daily living. *Journal of Gerontology: Medical Sciences*, 60(5), 654-659
- A.35 **Lum, Y.** (2004). Health-wealth association among older Americans: Racial and ethnic Differences. *Social Work Research*. 28(2): 106-116
- A.36 **Lum Y.** and Lightfoot E. (2003). The effect of health on retirement saving among older workers. *Social Work Research*, 27(1), 31-44
- A.37 Kane, R. L., Homyak, P., Bershady, B., & **Lum, Y.**, & Siadaty, M. S. (2003). Outcomes of managed care of dually eligible older persons. *The Gerontologist*. 43(2):165-74
- A.38 Kane, R. L., Homyak, P., Bershady, B., & **Lum, Y.** (2002). Consumer responses to the Wisconsin Partnership Program for elderly persons: A variation on the PACE model. *Journal of Gerontology: Medical Sciences*, 57A(4), M250-M258
- A.39 Kane, R. L., Flood, S., Keckhafer, G., Bershady, B., & **Lum Y.** (2002). Nursing home residents covered by Medicare risk contracts: Early findings from the Evercare Evaluation Project. *Journal of the American Geriatrics Society*, 50, 719-727

- A.40 Ozawa, M. N., & **Lum, Y.** (2001). Taking risk in investing in the equity market: Racial and ethnic differences. *Journal of Aging and Social Policy*, 12(3), 1-21
- A.41 **Lum, Y.**, Chang, H. J., & Ozawa, M. N. (1999). The effects of race and ethnicity on use of health services by older Americans. *Journal of Social Service Research*, 25(4), 15-42
- A.42 Ozawa, M. N. & **Lum, Y.** (1998). Marital status and change in income status: 10 years after retirement. *Social Work Research*, 22, 116-128
- A.43 **Lum, Y.** & Chang, H. J. (1998). The effect of Medicaid coverage on use of health services by low-income elderly people. *Social Work Research*, 22, 31-43
- A.44 Ozawa, M. N., & **Lum, Y.** (1997). Economic satisfaction among American retirees. *Journal of Gerontological Social Work*, 27(4), 21-40
- A.45 Ozawa, M. N., & **Lum, Y.** (1997). Safety net and poor: generational differences in the United States. *Korean Journal of Social Welfare Studies*, 9, 177-202
- A.46 Ozawa, M. N., & **Lum, Y.** (1996). How safe is the safety net for poor children? *Social Work Research*, 20, 238-254

Editorials in Peer Reviewed Journals

- A.47 **Lum, T. Y.** (2012). Long-term care in Asia (Editorial). *Journal of Gerontological Social Work*, 55(7), 563-569.
- A.48 **Lum, T. Y.** (2011). Social development and aging (Editorial, in a special issue on Social Development and Aging). *Social Development Issues*. 32(1), 1-5

Book Review in Peer Reviewed Journal

- A.49 **Lum, T.Y.** (2010). Social Security, the Economy and Development (Book review). *Social Services Review*, 84(4), 702-704.

B. Book Chapters

- B.1 Shum, M. H. Y., Ho, A. H. Y.[#], Luo, H.^{*}, Wang, J. F., Wang, Y., **Lum, T. Y. S.** (in press). Protecting the rights of Chinese elders in need of residential care: The dilemma of social justice and health equity in the People's Republic of China. In Meenan H., Rees N., and Doron I. (Ed), *Human Rights and Residential Care for Older Persons: International Perspectives on a Right's Culture*. Oxford UK: Routledge

- B.2 **Lum, T.Y.**, Wang, X., & **Danso, K.** (2010). 2008 Wenchuan earthquake in China: Reflections on the role of social workers in disaster intervention. In D. F. Gillespie & K. Danso (Eds.), *Disaster concepts and issues: A guide for social work education and practice* (pp. 205–220). Alexandria, VA: CSWE Press.
- B.3 Zhang, X., **Lum, T. Y.**, & Xu, Y. (2010). Economic development and household economic well-being in urban China. In K. H. Mok & Y-W. Ku (Eds.), *Social cohesion in greater China: Challenges for social policy and governance* (pp. 319-338). London: World Scientific Publishing Company.
- B.4 **Lum, T. Y.** (2006). Using large survey datasets for research on older adults and families. In B. Berkman & S. D'Ambruso (Eds.), *The Oxford handbook of social work in aging* (pp.1001-1008). New York: Oxford University Press.
- B.5 **Lum, Y.**, & Chang, H. J. (2000). The effect of Medicaid coverage on use of health services by low-income elderly people. In S.M. Keigher, A.E. Fortune, & S.L. Witkin (Eds.), *Aging and social work: The changing landscapes*. Washington DC: NASW Press. (This chapter was originally published in the March 1998 issue of *Social Work Research*, 22(1), 31-43).
- B.6 Ozawa, M.N., & **Lum, Y.** (2000). Marital status and change in income status 10 years after retirement. In S. M. Keigher, A. E. Fortune & S. L. Witkin (Eds.), *Aging and social work: The changing landscapes* (pp 41-57). Washington DC: NASW Press. (This chapter was originally published in the June 1998 issue of *Social Work Research*, 22(2), 116-128).
- B.7 Ozawa, M. N., **Lum, Y.**, & Tseng, H.Y. (1999). Net worth at retirement and 10 years later. In S. S. Nagel (Ed.), *The substance of public policy* (pp. 245-274). New York: Nova Science Publishers.
- B.8 Ozawa, M.N. & **Lum, Y.** (1999). How safe is the safety net for poor children? In E. Hansan & R. Morris (Eds.), *Welfare reform 1996-2000: Is there a safety net*. Westport, CT: Greenwood Press.p.151-174 (This chapter was originally published in December 1996 issue of *Social Work Research*, 20(4), 238-254).
- B.9 Ozawa, M.N. & **Lum, Y.** (1997). How safe is the safety net for poor children? In P. L. Ewalt, E. M. Freeman, S. A. Kirk, & D. L. Poole (Eds.), *Social Policy: Reform, Research, and Practice*. NASW Press. (This chapter was originally published in December 1996 issue of *Social Work Research*, 20(4), 238-254).

Chapters in Proceedings

- B.10 Mahaoney, K. J.. & **Lum, T. Y.** (2008). Consumer directed care and quality of life of older people in the community: the cash and counseling experience. *Proceedings of CADENZA Symposium 2007: Preparing for an elder friendly Hong Kong*. Hong Kong: CADENZA.

- B.11 Mahaoney, K. J., & **Lum, T. Y.** (2008). New ways of thinking about home and community based services for elderly and people with disability – Consumer choice and quality management. *Proceedings of CADENZA Symposium 2007: Preparing for an elder friendly Hong Kong*. Hong Kong: CADENZA.

C. Consultancy Reports

- C.1 **Lum, T. Y., Chan, O. F.,** Lau, M. (2014). *Report on landscape study of community care services for older people in Hong Kong*. Hong Kong: Sau Po Center on Ageing (Submitted to the Hong Kong Housing Society; 49 pages)
- C.2 **Lum, T. Y.,** Fung, W., Lau, M., Ho, R. T. W., Tse, S., & Jordan, L. P. (2014). *A report on practice outside Hong Kong on financial assistance for persons with disabilities*. Hong Kong: Sau Po Center on Ageing. (Submitted to the Labor and Welfare Bureau of Hong Kong SAR Government; 703 pages)
- C.3 **Lum, T. Y.,** Tong, T., Lau, M., & Ho, A[#]. (2014). *Ageing with Down syndrome: Health and social care needs of older adults with Down syndrome and their family caregivers*. Hong Kong: Sau Po Center on Ageing. (Submitted to the Hong Kong Down Syndrome Association; 44 pages)
- C.4 **Lum, Y. S.** (2013). *Retirement protection knowledge and planning of middle class middle age working people in Hong Kong*. Hong Kong: Sau Po Center on Ageing. (Submitted to the Prudential Insurance; 34 pages)
- C.5 **Lum, T. Y.** (2013). *Enhancement of integrated home care services*. Hong Kong: Sau Po Center on Ageing. (Submitted to the Hong Kong Family Welfare Society)
- C.6 Lou, V. W. Q., **Lum, T. Y.,** & Chui, E. W. T. (2012). *Social capital and life satisfaction of social service Users*. Hong Kong: Sau Po Center on Ageing. (Submitted to Yan Oi Tong, Hong Kong; 155 pages)
- C.7 **Lum, T. Y. S.,** Tong, T., & Lau, M. (2012). *A study of staffing issue in long term care sector in Hong Kong*. Hong Kong: Sau Po Center on Ageing. (Submitted to the Elderly Service Association of Hong Kong. Hong Kong; 29 pages)
- C.8 **Lum, T. Y., Chui, E. W. T.,** & Lou, V. W. Q. (2012). *Promoting ageing in place for Elderly Tenants*. Hong Kong: Sau Po Center on Ageing. (Submitted to the Hong Kong Housing Society; 47 pages)
- C.9 Chow, N. W. S., & **Lum, T. Y.** (2008). *Trends in family attitudes and values in Hong Kong*. Hong Kong: Department of Social Work and Social Administration. (Submitted to the Central Policy Unit (CPU) of HKSAR; 37 pages)

- C.10 Gibson, P. A., & **Lum, T. Y.** (2003). *Informal kinship care in Minnesota: A pilot study*. Minnesota: University of Minnesota School of Social Work. (Submitted to the Minnesota Kinship Care Association; 59 pages)

D. Published conference abstracts / papers (all juried paper selection included)

- D.1 **Lum, T. Y.**, Ho, A. H. Y.[#], Kan, W. W. S.^{*}, Lau, M. M. Y., Wong, G. H. Y.[#], & Yek, O. P. L.^{*} (2014, Aug). *Preliminary findings from the community care voucher pilot program in Hong Kong*. Paper presented in the International Conference on Evidence-based Policy in Long-term Care. London: London School of Economics and Political Science
- D.2 Davis C., Harris N., & **Lum, T.** (2014, July). *A global online classroom: Teaching international social work to students across border*. Proceeding of the Joint World Conference on Social Work, Education, and Social Development. Australia: Melbourne
- D.3 Xu Y., Chan P. & **Lum T.** (2013, Nov). *Estimating long term care needs of older people in Beijing*. Paper presented at the 66th Annual Scientific Meeting of the Gerontological Society of America. LA: New Orleans
- D.4 **Lum, T.**, Lou, V. W. Q., Tong, T. L. W., & Chen, Y. Y.^{*} (2014, Nov). *Community support and ageing-in-place preference of low income elderly people*. Paper presented at the 66th Annual Scientific Meeting of the Gerontological Society of America. LA: New Orleans
- D.5 Lu, N., Lou, V. W. Q., & **Lum, T.** (2013, Nov). *Inter-regional and Intra-regional Disparities in the Health of Chinese Older Population*. Paper presented at the 66th Annual Scientific Meeting of the Gerontological Society of America. LA: New Orleans
- D.6 Wang, J. & **Lum, T.** (2013, Nov). *Social and family supports for elders with dementia and their caregivers in urban China*. Paper presented at the 66th Annual Scientific Meeting of the Gerontological Society of America. LA: New Orleans
- D.7 **Lum, T.**, Chui, E., Lou, V. & Lau M. (2013, Jun). *Rebalancing long term care in Hong Kong. The Journal of Nutrition, Health, and Ageing*. Presented at The 20th IAGG Congress of Gerontology and Geriatric. Korea: Seoul
- D.8 **Lum, T.**, Lou, V. W. Q., Tong, T. L. W., & Lu, N. (2013, Jun). *Developing an aging in place model for low income elderly households*. The 20th IAGG Congress of Gerontology and Geriatric in Seoul, Korea
- D.9 **Lum, T.** (2013, Jun). *Aging with intellectual disabilities in Hong Kong*. Presented at The 20th IAGG Congress of Gerontology and Geriatric. Korea: Seoul
- D.10 Lou V., **Lum, T.**, Lu N., & Tong T. (2012, Nov). *Community capital and well-being of older people in Hong Kong*. Paper presented at the 65th Annual Scientific Meeting of

the Gerontological Society of America. CA: San Diego

- D.11 **Lum T.** (2012, Nov). *Dementia care in four metropolitan cities in greater China*. Paper presented at the 65th Annual Scientific Meeting of the Gerontological Society of America. CA: San Diego
- D.12 **Lum, T., Parashuram, S., Kane, R. L., Homyak, P., & Wysocki, A.** (2011, Nov). *The effects of chronic illness on costs of care for older persons receiving long-term care*. Paper presented at the 64th Annual Scientific Meeting of the Gerontological Society of America. MA: Boston
- D.13 **Lum, T.** (2011, Nov). *Small house nursing homes for frail elders in Asian Countries?* Paper presented at the 64th Annual Scientific Meeting of the Gerontological Society of America. MA: Boston
- D.14 Kane, R. A., Culter, L., **Lum, T.Y., & Peter, L.** (2011, Nov). *Small house nursing homes and dementia care: Clientele and outcomes*. Paper presented at the 64th Annual Scientific Meeting of the Gerontological Society of America. MA: Boston
- D.15 **Lum, T.Y.** (2011, Nov). *Family care, living arrangements and health of older people in China*. Paper presented at the 64th Annual Scientific Meeting of the Gerontological Society of America. MA: Boston
- D.16 **Lum, T.Y.** (2011, Nov). *Generational difference in attitude toward filial piety and elder care in Hong Kong*. Paper presented at the 64th Annual Scientific Meeting of the Gerontological Society of America. MA: Boston
- D.17 **Lum, T. Y., Xu, Y., & Zhang, X.** (2010, Nov). *Economic development and the well-being of older people in Urban China*. Paper presented at the 63rd Annual Scientific Meeting of the Gerontological Society of America. LA: New Orleans
- D.18 **Lum, T.Y.** (2010, Nov). *Living arrangement, care needs, and well-being of older adults in China*. Paper presented at the 63rd Annual Scientific Meeting of the Gerontological Society of America. LA: New Orleans
- D.19 **Lum, T. Y., Yan, E., Lau, A., Leung, G., Lam, D., & Chow, M.** (2010, Nov). *Generational difference in attitude toward filial piety in Hong Kong*. Paper presented at the 63rd Annual Scientific Meeting of the Gerontological Society of America. LA: New Orleans
- D.20 **Lum, T.Y.** (2010, Jun). *Social development and population aging in Asia – implication for long term care services*. Paper presented at the 2010 Joint World Conference on Social Work and Social Development. China: Hong Kong
- D.21 **Lum, T.Y., & Zhau, R.** (2010, Jun). *Culture and mental health: Perceived effectiveness of indigenous and western mental health interventions by mental health*

services providers in the United States. Paper presented at the 2010 Joint World Conference on Social Work and Social Development. China: Hong Kong

- D.22 **Danso, K.** & **Lum, T.Y.** (2010, Jun). *Hostile or friendly: Immigrants perception of Americans.* Paper presented at the 2010 Joint World Conference on Social Work and Social Development. China: Hong Kong
- D.23 **Lum, T.Y.,** & **Li X.** (2010, Jun). *Health dynamics of the oldest old in United States.* Poster presented at the 2010 Joint World Conference on Social Work and Social Development. China: Hong Kong
- D.24 **Lum, T. Y.,** **Ng, A.,** Yan, E., Lam, D., Leung, G., & Chow, M.L. (2010, Jun). *Impacts of Gender Role on the family attitudes and values in Hong Kong.* Poster presented at the 2010 Joint World Conference on Social Work and Social Development. China: Hong Kong
- D.25 **Lum, T. Y.,** Xu, Y., & Zhang, X. (2009, Nov). *Economic development and household economic well-being of older people in urban China.* Paper presented at the 62nd Annual Scientific Meeting of the Gerontological Society of America. GA: Atlanta
- D.26 **Lum, T. Y.,** & **Danso, K.** (2009, Nov). *Racial and ethnic differences in health and mental trajectories of older people.* Paper presented at the 62nd Annual Scientific Meeting of the Gerontological Society of America. GA: Atlanta
- D.27 **Lum, T. Y.,** & **Chan, R.** (2008, Nov). *Trajectory of health between immigrant and non-immigrant elders.* Paper presented at the 61st Annual Scientific Meeting of the Gerontological Society of America. MD: National Harbor
- D.28 **Lum, T. Y.,** & Lightfoot, E. (2007, Jan). *Disparity in health and disparity in wealth: Impacts of human capital and health capital on retirement savings.* Paper presented at the 9th Annual Conference of the Society for Social Work and Research. CA: San Francisco
- D.29 **Lum, T. Y.** (2006, Nov). *Services needs of homeless elders.* Paper presented at the 59th Annual Scientific Meeting of the Gerontological Society of America. TX: Dallas
- D.30 Kane, R. L., & **Lum, T.Y.** (2006, Nov). *The relationship between changes in the extent of HCBS and nursing home case mix.* Paper presented at the 59th Annual Scientific Meeting of the Gerontological Society of America. TX: Dallas
- D.31 Gibson, P., & **Lum, T.** (2006, Nov). *Impact of raising grandchildren on the well-being of older grandparents.* Paper presented at the 59th Annual Scientific Meeting of the Gerontological Society of America. TX: Dallas
- D.32 **Lum, T. Y.,** Vallecillo, B., & Davison, L. (2006, Nov). *Peer mental health counseling for older people: Clients and volunteers outcomes.* Paper presented at the 59th Annual

Scientific Meeting of the Gerontological Society of America. TX: Dallas

- D.33 Lightfoot, E., & **Lum T.Y.** (2006, Jan). *An analysis of work accommodation rates for older adults since the implementation of the Americans with Disabilities Act*. Paper presented at the 9th Annual Conference of the Society for Social Work and Research in TX: San Antonio
- D.34 **Lum, T.** (2005, Nov). Quality indicators in the Green Houses compared to conventional nursing home care. Paper presented at the 58th Annual Scientific Meeting of the Gerontological Society of America. FL: Orlando
- D.35 **Lum T.** (2005, Nov). *Adjustment for complex sampling designs in secondary analysis: An example using HRS/AHEAD data in aging research*. Paper presented at the 58th Annual Scientific Meeting of the Gerontological Society of America. FL: Orlando
- D.36 **Lum T.** (2005, Aug). *Certificate and other infusing strategies to enhance geriatric social work training in undergraduate and graduate programs*. Paper presented in the Social Work Education in Asian Communities Conference. China: Beijing
- D.37 Kane, R. A., Cutler, L. J., **Lum, T.**, & Yu, A. (2005, Jun). *Results from the Green House evaluation in Tupelo, MS*. Paper presented at the Academy Health Annual Meeting. MA: Boston
- D.38 **Lum T.**, & Vallecillo, B. (2005, Mar). *Results for the elders counseling elders mental health program*. Paper presented at the 2005 Joint conference of The National Council on the Aging and the American Society on Aging. PA: Philadelphia
- D.39 Vang, P., & **Lum, T.** (2005, Feb). *Southeast Asian adult mental health: Barriers to service utilization*. Paper presented at the 51st Annual Program Meeting of the Counsel on Social Work Education. NY: New York City
- D.40 **Lum, T. Y.**, & Kwon, H. K. (2004, Nov). *Health disparities among immigrant and non-immigrant old people: The effects of acculturation and human capital*. Paper presented at the 57th Annual Scientific Meeting of the Gerontological Society of America. Washington DC
- D.41 Kane, R. A., Cutler L. J., & **Lum, T.Y.** (2004, Nov). *Studying the Green Houses in Tupelo, MS: Preliminary lessons from a radical example of culture change in action*. Paper presented at the 57th Annual Scientific Meeting of the Gerontological Society of America. Washington DC
- D.42 **Lum, Y.**, Lin, W-C., & Kane, R. L. (2004, Nov). *Use of proxy respondents and accuracy of Minimum Data Set assessments of activities of daily living*. Paper presented at the 57th Annual Scientific Meeting of the Gerontological Society of America. Washington DC

- D.43 **Lum, Y.** (2003 Nov). *Impacts of volunteering on older people's adjustment of their aging process – a mixed method study*. Paper to be presented at the 56th Annual Scientific Meeting of the Gerontological Society of America. CA: San Diego
- D.44 **Lum, Y., & Lightfoot, E.** (2003, Feb). *Do disability anti-discrimination laws increase labor force participation? A longitudinal study*. Paper presented at the 49th Annual Program Meeting of the Counsel on Social Work Education. GA: Atlanta
- D.45 **Phan, P., & Lum, Y.** (2003, Feb). *Social Work and Southeast Asian: Needs, Utilization, and Intervention: A 25-Year Review*. Paper presented at the 49th Annual Program Meeting of the Counsel on Social Work Education. GA: Atlanta
- D.46 **Lum, Y. & Lightfoot, E.** (2003, Jan). *Live longer and be happier: Is volunteering the missing link*. Paper presented at the 7th Annual Conference of the Society for Social Work and Research. Washington, DC
- D.47 Lightfoot, E. & **Lum, Y.** (2003, Jan). *Do disability rights laws increase labor force participation? A longitudinal study of employment rates of older persons with disabilities*. Paper presented at the 7th Annual Meeting of the Society for Social Work and Research. Washington DC
- D.48 Lightfoot E. & **Lum Y.** (2002, Nov). *Volunteerism in a changing world: How volunteering affects older people's physical and mental health*. Paper presented at the 55th Annual Scientific Meeting of the Gerontological Society of America. MA: Boston
- D.49 Degenholtz, H. B., Kane, R. L., Lin, W-C., & **Lum, Y.** (2002, Nov). *Making the Best of the MDS*. Paper presented at the 130th Annual Meeting of the American Public Health Association. PA: Philadelphia
- D.50 **Lum, Y., & Lightfoot, E.** (2002, Feb). *Impact of health on retirement savings among older workers*. 48th Annual Program Meeting of the Council on Social Work Education. TN: Nashville
- D.51 **Lum, Y.** (2001, Nov). *Racial and ethnic differences in family caregiving for frail elderly: economic, family structural and cultural explanations*. Paper presented at the 54th Annual Scientific Meeting of the Gerontological Society of America. IL: Chicago.
- D.52 **Lum, Y.** (2001, Mar). *Family care giving among elderly people: racial and ethnic differences*. Paper presented at the 47th Annual Program Meeting of the Council on Social Work Education. TX: Dallas
- D.53 **Lum Y.** (2000, Nov). *Effects of health on asset accumulation and retirement saving*. Paper presented at the 53rd Annual Scientific Meeting of the Gerontological Society of America. Washington DC
- D.54 Ozawa, M. N., & **Lum, Y.** (1999, Nov). *Taking risk in investing in the equity market:*

racial differences. Paper presented at the 52nd Annual Scientific Meeting of the Gerontological Society of America. CA: San Francisco

- D.55 **Lum, Y.** (1998, Mar) *The racial and ethnic differences in health-wealth association among older Americans*. Paper presented at the 44th Annual Program Meeting of the Council on Social Work Education. OL: Orlando
- D.56 Ozawa, M. N., & **Lum, Y.** (1997, Nov). *How safe is the safety net for poor children*. Paper presented at the Odyssey Forum. MD: Baltimore
- D.57 Ozawa, M. N., & **Lum, Y.** (1997, Nov). *Change in net worth in advancing old age*. Paper presented at the 50th Annual Scientific Meeting of the Gerontological Society of America. OH: Cincinnati
- D.58 **Lum, Y.**, & Chang, H. J. (1997, Nov). *Effect of Medicaid coverage on use of health services by poor elderly people - racial and gender differences*. Poster presented at the 125th Annual Meeting of the American Public Health Association. IN: Indianapolis
- D.59 **Lum, Y.**, Chang, H. J., & Ozawa, M. N. (1997, Mar). *Gender and racial differences in health services utilization among the elderly*. Paper presented at the 43rd Annual Program Meeting of the Council on Social Work Education. IL: Chicago
- D.60 Chang, H. J., & **Lum, Y.** (1997, Mar). *Informal support networks and patterns of elderly care: Ethnic group comparisons*. Paper presented at the 43rd Annual Program Meeting of the Council on Social Work Education. IL: Chicago
- D.61 **Lum, Y.**, & Chang, H. J. (1996, Nov). *Racial differences in utilization of health and community care services among older Americans*. Paper presented at the 124th Annual Meeting of the American Public Health Association. NY: New York City
- D.62 Chang, H. J., & **Lum, Y.** (1996, Nov). *Risk factors associated with depression in a national sample of older adults*. Paper presented at the 124th Annual Meeting of the American Public Health Association. NY: New York City
- D.63 **Lum, Y.**, Chang, H. J., & Ozawa, M. N. (1996, Nov). *Effects of social network and economic resources on use of health services by the elderly*. Paper presented at the 49th Annual Scientific Meeting of the Gerontological Society of America. Washington DC
- D.64 Ozawa, M. N., & **Lum, Y.** (1996, Nov). *Change in women's income status in advancing old age*. Paper presented at the 49th Annual Scientific Meeting of the Gerontological Society of America. Washington DC.
- D.65 Ozawa, M. N., & **Lum, Y.** (1996, Nov). *How safe is the safety net for poor children*. Paper presented at the 1996 Association for Public Policy Analysis and Management Annual Research Conference. PA: Pittsburgh

- D.66 Chang, H. J., **Lum, Y.**, & Edwards, D. (1996, Feb). *Formal service use by demented elderly and their care-givers: a path model*. Paper presented at the 42nd Annual Program Meeting of the Council on Social Work Education. Washington, DC
- D.67 Ozawa, M.N., & **Lum, Y.** (1995, Nov). *Safety-net for the Elderly Poor*. Paper presented at the 48th Annual Scientific Meeting of the Gerontological Society of America. CA: Los Angeles.

RESEARCH GRANTS AND CONTRACTS

University Grants Council

- E.1 **Principal Investigator**. Characteristics and predictors of productive ageing involvement among older Chinese in Hong Kong. Funded by the Research Grants Council. Award amount: HK\$491,726 (award period: 2015 – 2016, status: ongoing)
- E.2 Co-Investigator. Model predicting health outcomes of family caregivers of Chinese dementia sufferers: A sequential explanatory mixed method study. Funded by the Research Grants Council. Award amount: HK\$563,254. (Principal investigator: Dr. Doris Yu, the Nethersole School of Nursing, Chinese University of Hong Kong, award period: 2014 – 2016, status: on-going)
- E.3 Co-Investigator. An integrated study of the population policy for Hong Kong. Funded by the Research Grants Council – Strategic Public Policy Research. Award amount: HK\$3,180,000 (Principal investigator: Prof. Paul Yip, Department of Social Work and Social Administration, HKU, award period: 2013 – 2018, status: on-going)
- E.4 Co-Investigator. Creating an adequate and equalizing but affordable retirement protection system in Hong Kong. Funded by the Research Grants Council – Strategic Public Policy Research. Award amount: HK\$2,826,090. (Principal Investigator: Prof. K. L. Chou, Hong Kong Institute of Education, award period: 2012 – 2017; status: on-going)

Other Competitive Research Grants

- E.5 Co-Principal Investigator. Faith and Science Collaborative Research Forum. Funded by the Templeton World Charity Foundation, Inc. for US\$804,086 (HK\$6,271,871) for three years (award period December 1, 2015 – November 30, 2018, PI: Professor Pauline Chui of Chemistry Department of HKU, status: on-going)
- E.6 **Principal Investigator**. Family caregiving and long-term care decision of people with dementia in Hong Kong. Funded by the Public Policy Research Funding Scheme. Award amount: HK\$289,067 (award period: 2014 – 2015; status: on-going)
- E.7 Co-Investigator. Study on the determinants of poverty and potential interventions to alleviate poverty in Hong Kong. Funded by the Hong Kong Jockey Club Charities Trust

- General Award. Award amount: HK\$14,620,000. (Principal investigator: Professor Paul Yip, the Department of Social Work and Social Administration, HKU, award period: 2014 – 2016, status: on-going)

- E.8 Co-Investigator. Teaching international social work to students across the globe using online technology. Funded by the International Association of Schools of Social Work. Award amount: US\$4,000 (HK\$31,200; Principal Investigator: Prof. Cindy Davis, University of Tennessee – Nashville, award period: 2013, status: successfully completed)
- E.9 Principal Investigator. A cross national comparison of caregiving barriers and supports between the United States, China, and Sweden. Funded by the Harvey A. Friedman Center for Aging’s Global Aging Initiative funding program, Washington University. Award amount: US\$14,800 (HK\$115,400; Co-Principal Investigator: Prof. M. Lilja, Luleå University of Technology in Sweden and Prof. S. Stark, Washington University in USA, award period: 2014, status: on-going)

Invited Contract Research

- E.10 **Principal Investigator.** Three-year project on enhancement of the infrastructure of long-term care in Hong Kong. Direct allocation by the Social Welfare Department of Hong Kong SAR Government. Funded amount: HK\$24,676,000 (US\$3,163,590). (award period: 2013 – 2016, the project will help the HKSAR Government to redesign its long term care system for frail elders and this new systems is essential for the successful implementation of the new “money follows the old person” aging policy and the carer allowance program in Hong Kong, **my research team is the only team in the world that have the expertise on both developing casemix and outcome systems for long term care and cultural context of elder care in Chinese society**)
- E.11 **Co-Director.** The CADENZA Project. The CADENZA project was supported by the Hong Kong Jockey Club with a donation of HK\$380 million. (Co-Directors: Professor Ada Mui of Columbia University and Professor Jean Woo of the Chinese University of Hong Kong, award period: 2006 – 2011. Professor Jean Woo became the sole director of the project after the first year when both Professor Mui and I changed our roles to become project consultants). **A research grant of US\$209,111 (HK\$1,633,157) was given to the University of Minnesota to support my work in the CADENZA project in Hong Kong**

Competitive Contract Research

As Principal Investigator

- E.12 Principal Investigator. A study on the practice outside Hong Kong on financial assistance for persons with disabilities. Funded by the Labor and Welfare Bureau of HKSAR Government. Award amount: HK\$1,099,027 (award period: 2013 – 2014, status: final reported submitted)

- E.13 Principal Investigator. Casemix study on the community care services for the elderly. Funded by the Social Welfare Department of the Hong Kong SAR Government. Award Amount: HK\$1,430,000 (award period: 2013 – 2014, status: draft final report submitted, impact: findings from this study will help the Social Welfare Department to develop a payment level system for its new community care voucher pilot program.)
- E.14 Principal Investigator. Study on enhancement of integrated home care services. Funded by the Hong Kong Family Welfare Society (HKFWS). Award Amount: HK\$247,200 (award period: 2013 – 2014, status: on-going, interim report submitted)
- E.15 Principal Investigator. Retirement protection knowledge and planning of middle class middle age working people in Hong Kong. Funded by the Prudential Assurance (Hong Kong). Award amount: HK\$500,000 (award period: 2013, status: completed)
- E.16 Principal Investigator. Landscape study of community care services for older people in Hong Kong. Funded by the Hong Kong Housing Society. Award amount: HK\$139,483 (award period: 2013, status: completed)
- E.17 Principal Investigator. Promoting aging-in-place for elderly tenants in rental estates of Hong Kong Housing Society (HKHS). Funded by the Hong Kong Housing Society. Award amount: HK\$500,000 (award period: 2011 – 2012, status: completed, **award: this project received the 2014 Knowledge Exchange Award from the Faculty of Social Sciences, HKU**)
- E.18 Principal Investigator. Mental health assessment and screening instruments for Southeast Asian Populations. Funded by the U.S. Department of Agriculture's Agriculture Experimental Station Research Grant. Award amount: US\$100,000 (HK\$780,000, award period: 2009 – 2011, status: completed)
- E.19 Principal Investigator. Trends in family attitudes and values in Hong Kong. Funded by the Central Policy Unit of the HKSAR Government. Award amount: HK\$ 255,000 (co-principal investigator: Professor Nelson Chow, Department of Social Work and Social Administration, HKU, award period: 2007 – 2008, status: completed)
- E.20 Principal Investigator. Mental health needs and services utilization of Southeast Asians in Minnesota. Funded by the US Department of Agriculture's Agriculture Experiment Station Research Grant. Six year total budget about US\$130,000 (HK\$1,014,000, award period: 2003 – 2009, status: successful completed)
- E.21 Co-Principal Investor. Informal kinship care in Minnesota: A pilot study. Funded by the Minnesota Kinship Caregivers Association for US \$50,000 (HK\$390,000, principal investigator: Dr. Priscilla Gibson, University of Minnesota School of Social Work, award period: 2002 – 2003, status: completed)
- E.22 Principal Investigator. Patterns of nursing home use and outcomes in Minnesota. Funded by the Hartford Foundation. Award Amount: US\$100,000 (HK\$780,000, award period:

2001 – 2003, status: successfully completed)

As Co-Investigator

- E.23 Co-Investigator. Residential home for the elderly of Hong Kong Sheng Kung Hui Welfare Council. Funded by the Hong Kong Sheng Kung Hui Welfare Council. Award amount: HK\$369,368. (Principal Investigator: Dr. Vivian Lou, Department of Social Work and Social Administration, HKU, award period 2014 – 2015, status: ongoing)
- E.24 Co-Investigator. An evaluation study of the LinkAges Project. Funded by the Aberdeen Kai Fong Association (AKA). Award amount: HK\$299,485 (principal investigator: Dr. Vivian Lou, Department of Social Work and Social Administration, HKU, award period: 2013 – 2014, status: ongoing)
- E.25 Co-Investigator. A comprehensive study on housing in an ageing community. Funded by the Hong Kong Housing Society. Award amount: HK\$1,930,000. (Principal Investigator: Professor Rebecca L. H. Chiu of the Dept. of Architecture, HKU; award period: 2013 – 2014, status: ongoing)
- E.26 Co-Investigator. Pharmaceutical services of elderly patients in Hong Kong. Funded by the Pharmaceutical Society of Hong Kong Limited. Award amount: HK\$65,050. (principal investigator: Prof. Ian Wong, Department of Pharmacology & Pharmacy, HKU; award period: 2012, status: completed)
- E.27 Co-Investigator. Social capital and life satisfaction of social service users. Funded by the Yan Oi Tong. Award Amount: HK\$297,600. (principal investigator: Dr. Vivian Lou, Department of Social Work and Social Administration, HKU, award period 2011 – 2012 , status: completed)
- E.28 Co-Investigator. Full-scale implementation and sustainability of small group nursing homes in Tupelo, MS: Lessons for replication. Funded by the Commonwealth Foundation. Award amount: US\$29,985 (HK\$233,883, principle investigator: Prof. Rosalie Kane, University of Minnesota School of Public Health, award period: 2006, status: completed)
- E.29 Co-Investigator. Research of program and techniques taken by states to rebalance their long term care system. Funded by the Center for Medicare and Medicaid Services. Award amount: US\$2,018,246 (HK\$15,742,319) (principal investigator: Prof. Rosalie Kane, University of Minnesota School of Public Health, award period: 2004 – 2007, status: completed)
- E.30 Co-Investigator. Feasibility of small group nursing homes: Lessons from Tupelo, Mississippi. Funded by the Commonwealth Foundation. Award amount: US\$295,330 (HK\$2,303,574, principal investigator: Prof. Rosalie Kane, University of Minnesota School of Public Health, award period: 2003 – 2005, status: completed)

Competitive University Grants

As Principal Investigator / Co-Principal Investigator

- E.31 Principal Investigator. Monetary costs of community care for dementia: A pilot micro-costing study using ecological momentary assessment. Seed Funding Program for Basic Research, HKU. Award amount: HK\$47,900 (award period: 2014, status: ongoing)
- E.32 Co-Principal Investigator. Ageing. Seed Funding for Strategic Research Theme, HKU. Award amount: HK\$1.5 million (principal investigator: Professor K. S. L. Lam of the Department of Medicine and co-principal investigator: Professor A. Xu of the Department of Medicine, HKU, award period: 2013 – 2016, status: ongoing)
- E.33 Principal Investigator. Ageing with Down syndrome: Establishing the baseline of physical fitness and functioning for adults with Down syndrome in different age cohorts. Seed Funding Programme for Basic Research, HKU. Award amount: HK\$67,300 (award period: 2013 – 2014, status: on-going)
- E.34 Principal Investigator. Family caregiving and long term care decision of frail elderly people in Hong Kong. Seed Funding Programme for Basic Research, HKU. Award amount: HK\$120,000 (award period: 2012 – 2013, status: successfully completed, impact: findings from this study were used to support the application of a research grant submitted to the Public Policy Research Funding Scheme and the project was funded: project E.5)
- E.35 Principal Investigator. Comparative studies of families in Chinese society. Funded by the Grant-In-Aid of Research, Artistry and Scholarship at the University of Minnesota. Award amount: US\$13,188 (HK\$102,866, award period: 2009 – 2011, status: successfully completed)
- E.36 Principle Investigator. Nongovernmental organizations and development of social welfare in China.” Funded by the Grant-In-Aid of Research, Artistry and Scholarship at the University of Minnesota for US\$17,097 (HK\$133,357, award period: 2002 – 2003, status: successfully completed)
- E.37 Principal Investigator. Family caregiving among elderly people: racial and ethnic differences.” Funded by the President's Faculty Multicultural Research Award, University of Minnesota for US\$7,336 (HK\$57,221, award period: 2000 – 2001, status: successfully completed)
- E.38 Principal Investigator. Minnesota social work institute on community based participatory research and education. Funded by the University of Minnesota Engaged Department Grant. Award amount: US\$9,970 (HK\$ 77,766, co-principal investigator: Professor Elizabeth Lightfoot of the University of Minnesota School of Social Work, award period: 2010 – 2011, status: successfully completed)

As Co-Investigator

- E.39 Co-Investigator. Contributing Factors and Early Outcomes of Delayed Help-seeking and Intervention in Dementia: Naturalistic Prospective Study and Predictive Model. HK\$96,068. (principal investigator: Dr. GHY Wong, awarded period: 05.2015 – 05.2016, status: on-going)
- E.40 Co-Investigator. Comparing vascular dementia and Alzheimer's dementia: a preliminary, cross-sectional, multimodal comparative study evaluating clinical and cognitive profile, neuroimaging, biomarkers and quantitative EEG. HK\$120,000. (principal investigator: Dr. Joseph Kwan, award period: 01.01.2015 - 30.04.2016)
- E.41 Co-Investigator. Cognitive, psychosocial and neurobiological predictors and pathway of change in people with mild Alzheimer's disease receiving cognitive stimulation therapy. Seed Funding Programme for Basic Research. HK\$120,000 (principal investigator: Dr. GHY Wong, awarded period: 2014 – 2015, status: on-going)

Conference Grants (last three years)

- E.42 Principal Investigator. The 66th Annual Scientific Meeting of the Gerontological Society of America. URC/CRCG - Conference Support for Teaching Staff. Award amount: HK\$16,500 (awarded period: 2013, status: successfully completed)
- E.43 Principal Investigator. The 65th Annual Scientific Meeting of the Gerontological Society of America. URC/CRCG - Conference Support for Teaching Staff. Award amount: HK\$16,500 (awarded period: 2011, status: successfully completed)
- E.44 Principal Investigator. The 64th Annual Scientific Meeting of the Gerontological Society of America. URC/CRCG - Conference Support for Teaching Staff. Award amount: HK\$16,500 (awarded period: 2011, status: successfully completed)
- E.45 International Travel Grant for a trip to earthquake disaster areas in China, International Office of the University of Minnesota: Award amount: US\$1,500 (HK\$11,700, awarded period: 2008, status: successfully completed)

HKU Knowledge Exchange Grants

- E.46 Principal Investigator. Health x Productive Ageing: Elder peer health educator programme. Funded by the Impact Project Scheme of Knowledge Exchange Exercise 2014/15. Award Amount: HK\$70,000 (awarded period: 2014 – 2015, status: ongoing)
- E.47 Workshop and Implementation Guidebook for Elderly Services Organisation Managers on Evidence-based Non-pharmacological Interventions for People with Dementia and Family Caregivers. Funded by the Impact Project Scheme of Knowledge Exchange Exercise 2014/15. Award Amount: HK\$85,000 (award period: 2014 – 2015, status: ongoing)

INVITED KEYNOTE/PLENARY LECTURES

International

After joining the University of Hong Kong in 2011

- F.1 *Older people's social engagement in Hong Kong and China.* Feb 23, 2015. National Singapore University, Singapore
- F.2 *From recipient society to participant society: social policy agenda for ageing societies in Asia.* Nov 2, 2014. Chinese Gerontological Society, Shanghai
- F.3 *Policy aspects on psychosocial issues related to dementia patients and their caregivers.* Jun 2, 2014. Presented at International Alzheimer's Disease Conference 2014 in Hong Kong
- F.4 *Toward an empowerment based long term care policy.* May 3, 2014. Presented at Harvard Asia Center's Asia Vision 21 Conference in Hong Kong
- F.5 *Population ageing and long term care policy in Hong Kong.* Nov 19, 2013. Presented in Tulane University, USA
- F.6 *Tracking social issues arising from funding healthcare in an ageing society.* Oct 31, 2013. Presented at Swiss Re Health Symposia 2013 in Hong Kong
- F.7 *Case example of primary data: Long-term care – moving from national to cross national research.* Jun 22-23, 2013. Presented at Global Ageing Initiative in Seoul, Korea
- F.8 *Social workers in eldercare services.* May 25-27, 2013. Presented at Shanghai Forum 2013 in Shanghai, China
- F.9 *Always staying relevant and young at heart.* Sep 6-7, 2012. Presented at Toward an Age-Friendly World Conference in Singapore
- F.10 *Psychosocial Care of Dementia Caregivers.* Jun 15, 2012. Presented at International Alzheimer's Disease Conference 2012 in Li Ka Shing Faculty of Medicine, The University of Hong Kong
- F.11 *Mental health of low income older people in the US.* May 22, 2012. Presented at Zhejiang University International Conference on Ageing in Zhejiang University
- F.12 *Development of research in productive aging.* Feb 9, 2012. Presented at 1. Productive Aging Conference in Taiwan.
- F.13 *Interaction between long term care policy and family care for frail elders in ageing*

society (老齡化社會下的長者政策與家庭養老文化及社會政策有何互動關係). Feb 6, 2012. Presented at Cross-Strait Conference on Elderly Services in Hong Kong

- F.14 *Evidence based elder care - How research contributes to improve the quality of care and quality of life of older people in long term care system*. Dec 7, 2011. Presented at Knowledge Exchange Conference: Knowledge Transforming Society in Hong Kong
- F.15 *Advancing research / evaluation of productive aging program: Building the evidence base*. Aug 10, 2011. Presented at Productive Aging in China: Toward Evidence-Based Practice and Policy Conference in Beijing, China

Before joining the University of Hong Kong

- F.16 *Long term care in the United State*. Dec 17, 2008. Presented in Beijing Normal University, Beijing, China
- F.17 *Roles of social work professions in post-disaster intervention*. Nov 13, 2008. Presented at the Global Dialogue: International Conference on Post-Disaster Recovery and Reconstruction in Chengdu, China
- F.18 *Economic development and household economic well-being in urban China*. Jun 6, 2008. Presented at Conference on Social Cohesion in Greater China in Center for Asia Study, the University of Hong Kong
- F.19 *Filial piety and individual right – Aging policy of the United States*. Nov 30, 2004. Presented at International Conference on Filial Piety among Chinese Communities in Hong Kong

Local (in last five years)

- F.20 *香港長期護理基礎設施的研究 (Research to improve the infrastructure of long term care services in Hong Kong)*. Nov 12, 2014, Presented in the Long Term Care Forum organized by the Hong Kong Council of Social Services, Hong Kong SAR.
- F.21 “從受助者社會到參與者社會：社區為本的康復政策議程” (*From recipient society to participant society: A community based rehabilitation Policy Agenda*). Oct 28, 2014. Alliance for Subvented Residential Care Service. Hong Kong SAR.
- F.22 *從受助者社會到參與者社會：香港安老服務長期照顧的壓力與契機 (From recipient society to participant society: Challenges and opportunities of long term care system in Hong Kong)*. Oct 19, 2014, presented in the private nursing home providers’ forum, Hong Kong SAR.
- F.23 *Exploring the interaction between rehabilitation policy and elder care policy (智樂社區-探討復康政策與樂齡服務之影響)*, Aug 25, 2014. Presented in the Association for Parents with People with Intellectual Disabilities (澳門弱智人士家長協進會), Macau

SAR

- F.24 *The challenge of population aging in HK and the implication for health and social care for frail elders in Hong Kong.* Aug 16, 2014. Presented in Yan Oi Tong.
- F.25 *Community- based dementia care system.* Jul 28, 2014. Presented at Geriatric Medicine Education Meeting organized by Hong Kong West Cluster Hospitals of Hospital Authority.
- F.26 *Establishing outcome indicators for community investment projects.* Jul 21, 2014. Presented in Community Investment and Inclusion Fund.
- F.27 *Grand Round – Psychosocial care of frail elders.* Jul 19, 2014. Presented in Department of Medicine, HKU
- F.28 *Specialization in MSW program – HKU experience.* Jul 7, 2014. Presented in Hong Kong Social Worker Registration Board.
- F.29 *安老服務對智障雙老問題的啟示.* Jun 10, 2014. Presented at 「雙老、何太急」 Symposium organized by the Hong Kong Joint Council of Parents of the Mentally Handicapped.
- F.30 *香港家居照顧服務政策評議.* May 31, 2014. Presented at Long Term Care Policy Forum in Polytechnic University of Hong Kong.
- F.31 *Future of community care service for the elderly.* May 27, 2014. Presented in a forum organized by the Hong Kong Family Welfare Society.
- F.32 *Better preparation, better future in dementia care.* Apr 4, 2014. Presented at Seminar on Challenges and New Trends in Elderly Service and Dementia Care organized by Hong Kong Alzheimer's Disease Association.
- F.33 *Developing case mix and outcome indicators for long term care system for Hong Kong.* Feb 11, 2014. Presented in Legislative Council.
- F.34 *Aging with Downs syndrome.* Dec 21, 2013. Presented in Hong Kong Downs Syndrome Association Annual Meeting
- F.35 *Public platform to promote productive activities of older people.* Presented at the Symposium on Productive Ageing in Asia organized by Faculty of Social Sciences and Sau Po Center on Ageing.
- F.36 *Retirement readiness in Hong Kong.* Oct 7, 2013. Presented in Prudential Insurance Company.
- F.37 *Caregiver services: from theory to practice (護老者服務 - 從理論到實踐).* Jan 11,

2013. Carer Forum

- F.38 *Productive ageing*. Dec 21, 2012. Presented in Hong Kong Police Force.
- F.39 *Silver market in Hong Kong*. Dec. 12, 2012. Presented at Forum on Age-friendly City—New Opportunities for Socio-demographic Aging organized by Hong Kong Council of Social Services
- F.40 *Population ageing in Hong Kong: Opportunities and Challenges*. May 2, 2012. Presented in Hong Kong CSR.
- F.41 *From community care to caring community*. Mar 2, 2012. Presented at in the 2012 Yuen Long District Welfare Planning Forum organized by HK Social Welfare Department Yuen Long District.
- F.42 *Consumer direction and community based long term care – U.S. experience*. Jun 9, 2010. Presented at the Seminar on Aging in Place: Multi-faceted Collaboration and Partnership organized by Hospital Authority of Hong Kong and the Christian Family Social Service Center

LEADERSHIP POSITIONS IN COMMITTEES AND PROFESSIONAL ORGANIZATIONS

International

- 2009 –present Co-convenor, Chinese Gerontological Studies Interest Group, the Gerontological Society of America, USA.
- 2012 – 2016 Member of the MSW Curriculum Committee, College of Social Policy and Social Development, Beijing Normal University, China: Beijing
- 2010 – 2014 Member of the Executive Committee of the Social Research, Policy and Practice Section of the Gerontological Society of America, USA
- 2010 – 2014 Member of the Information Technology Committee of the Gerontology Society of America, USA
- 2010 – 2011 Member of the National Program Advisory Committee of the Hartford Geriatric Social Work Doctoral Fellows Program, USA
- 2010 Selection committee, Society for Social Work and Research Doctoral Dissertation Fellow Award, USA
- 2008 – 2011 Member, Office of Minority and Multicultural Health Advisory Committee, Minnesota Department of Health, Minnesota, USA

- 2008 Wenchun Task Force, the Beijing Normal University and the Chinese Government, China
- 2005 – 2007 Member of the Executive Committee of the Social Research, Policy and Practice Section of the Gerontological Society of America, USA.
- 2005 – 2007 Member of the Information Technology Committee of the Gerontology Society of America, USA
- 2004 – 2007 Board Member, Little Brothers Friends of the Elderly, Minnesota, USA
- 2002 – 2006. Member of the National Advisory Committee of the Institute for Geriatric Social Work of Boston University School of Social Work, United States
- 2004 Member of the National Advisory Council of the Robert Wood Johnson Foundation's Cash & Counseling Program, United States

Local

- 2012-present Deputy Convenor, Healthy Ageing Strategic Research Themes, the University of Hong Kong.
- 2014-present Member, Hong Kong Health Forum
- 2014 – 2015 Board Member, Central Advisory Board of Senior Police Call in Hong Kong Police Force
- 2012 – 2014 Member, Specialized Committee on Elderly Service, Hong Kong Council of Social Service
- 2012-present Member of Advisory Committee, Mind-Lock Cognitive and Memory Training Center, Christian Family Service Center, Hong Kong

Scholarly Journal Editorship (All Current)

Associate Editor, BMC Geriatrics (2013 Impact Factor: 2.0)

Editorial Board Member, Journal of Applied Gerontology (2013 Impact Factor: 0.985)

Editorial Board Member, Home Health Care Services Quarterly

Editorial Board Member, Asian Journal of Gerontology and Geriatrics

Consulting Editor, Social Development Issues

Guest-editor, Journal of Gerontological Social Work

Grant Reviewer

2009-present Research Grants Council of Hong Kong Government, Hong Kong

2013 Academia Sinica, Taiwan

2012 Harvard University's Harvard China Fund

Ad-hoc Journal Reviewer

AAPI Nexus: Asian Americans & Pacific Islanders, Policy, Practice and Community.

Aging and Society

Aging International

Asia Pacific Journal of Social Work & Development

Family Practice

International Migration

International Journal of Social Welfare

Journal of Aging and Health

Journal of Aging and Human Development

Journal of Aging and Social Policy

Journal of Applied Gerontology

Journal of America Geriatric Society

Journal of Gerontology – Social Sciences

Journal of Gerontological Social Work

Journal of Social Services Research

Research on Aging

Social Development Issues

The Gerontologist

Conference Chair

Dec 12, 2011 Symposium on the Future Ageing Society, co-organized by Sau Po Centre on Ageing Centre and Faculty of Social Sciences, at Council Chamber, HKU

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

May 11, 2007 Conference Chair. Creating partnerships to address the mental health needs of Southeast Asians in Minnesota. School of Social Work, University of Minnesota

October 8, 2014

Jan 8-10 2007 Conference Co-Chair. CADENZA Symposium 2007: Preparing for an elder friendly Hong Kong. The University of Hong Kong. (Conference Co-Chair: Professor Ada Mui of Columbia University School of Social Work)

International Faculty Development Program (When I was in Minnesota)

Jul 13-Jul 24, 2009 3rd CADENZA Faculty Fellow Program. A Two week faculty development program funded by the Hong Kong Jockey Club. Participated by faculty members from 4 major universities in Hong Kong. Including professors in all rankings and from different disciplines (medicine, nursing, social work, applied social sciences, rehabilitation sciences) (co-trainers: Robert Kane and Rosalie Kane).

Jun 16-Jun 27, 2008 2nd CADENZA Faculty Fellow Program. A Two week faculty development program funded by the Hong Kong Jockey Club. Participated by faculty from 4 major universities in Hong Kong. Including professors in all rankings and from different disciplines (co-trainers: Robert Kane and Rosalie Kane).

Jul 2-Jul 13, 2007 1st CADENZA Faculty Fellow Program. An intervention research methods training for 10 faculty from 4 universities in Hong Kong. Funded by the Hong Kong Jockey Club. (Co-trainers: Professors Robert Kane and Rosalie Kane).

Invited International Training Workshops (when I was in Minnesota)

G.1 **Lum, T. Y.** (2009). A two hour training workshop on program evaluation at Shangdong University in China. Invited by the Washington University and the Shangdong University. July 30, 2009. China: Jinan, Shangdon.

G.2 **Lum, T. Y.** (2008). A One day workshop on research methods for a group of 10 university faculty from Hong Kong (co-trainers: Robert Kane and Rosalie Kane). Organized by the University of Hong Kong. Nov 24, 2008. Maryland: Two Habor.

G.3 **Lum, T. Y.** (2007). Long-term care system in the USA. Organized by the Henry G. Leong Program at the University of Hong Kong. Dec 7, 2007. China: Hong Kong.

G.4 **Lum, T. Y.** (2007). Ideology, values & constraints of community-based holistic care in the USA: Consumer Directed Care & the Cash and Counseling Program. Organized by the Henry G. Leong Program at the University of Hong Kong. July 30, 2007. China: Hong Kong.

G.5 **Lum, T. Y.** (2002). Workshops on program evaluation. Social Welfare Department of Hong Kong. Hong Kong. Jul 12 – Jul 21, 2002. China: Hong Kong

- G.6 **Lum, T. Y.** (2002). Seminar on policy evaluation. Hong Kong Council of Social Welfare. Jun 19, 2002. China: Hong Kong.
- G.7 **Lum, T. Y.** (2002). Workshop on program evaluation. Yan Chai Hospital Social Services Department. May 27 – Jun 24, 2002. China: Hong Kong.
- G.8 **Lum, T. Y.** (2001). Two Week training on program evaluation and practice evaluation. Social Welfare Department of Hong Kong. Jul, 2001. China: Hong Kong.
- G.9 **Lum, T. Y.** (2001). Workshop on policy analysis. Social Welfare Department of Hong Kong. Jul 17, 2001. China: Hong Kong.
- G.10 ***Lum, T. Y.** (2001). Workshop on program evaluation. Catholic Charities of St. Paul, Minnesota. Jun 1, 2001. MN: Twin Cities.
- G.11 ***Lum, T. Y.** (2000). Workshop on program evaluation and outcome measures. Center on Aging at the University of Hong Kong. Jun 10 – Jun 17, 2000. China: Hong Kong.

SELECTED MEDIA COVERAGE

Television

- Feb 20, 2014 HKTVM 《時事多面睇 -智障人士老齡化》
Apr 28, 2014 TVB The Pearl Report: Retirement Age.

Radio

- Apr, 2013 – RTHK Radio 5: Global Village. Regular weekly commentator since Apr 2013
- Dec 26, 2013 RTHK Radio 5: Population ageing
- Jan 28, 2012 Radio Television Hong Kong Radio 3: The Big Idea Program 11, Ageing
- Sep 25, 2013 China Radio International's Today on NEWS Plus Program. One hour life discussion on pension system reform in China

Newspapers

- Dec 21, 2013 Population Ageing. *Mingpao News*.
- Oct 14, 2012 Elderly need neighbours, not paid buddies, says ageing expert. *South China Morning Post*.
- Aug 30, 2012 Majority support universal pension. *China Daily Hong Kong Edition*.