



MRDRC Newsletter | Winter 2024 | 24(1)

Director’s corner

Dmitriy Stolyarov

MRDRC is dedicated to carrying out impartial, cutting-edge research with the aim of enhancing our understanding of how Social Security programs can best support and safeguard the welfare of various beneficiary groups, both now and in the future.

MRDRC aims to expand institutional and methodological diversity within its researcher network and acknowledges the need to adapt rapidly to the evolving

See Director, continued on Page 2

FY24 workshop explores community-engagement, new partnership

The MRDRC Researcher Workshop took place virtually March 14 and 15, with MRDRC researchers presenting new and continuing work, and fielding questions and comments from other investigators. As SSA’s priorities evolve, so too does the workshop. This year, In addition to 19 research presentations, the workshop included panels on community-engaged research (CER) and dissemination (CED) and a new training program with Charles Drew University of Medicine and Science (CDU), a historically black graduate and Hispanic-serving institution. Community-engagement and fostering research at minority-serving institutions are increasingly important to SSA.

MRDRC also uses the workshop as an introduction to SSA’s research program for

See Workshop, continued on Page 3

In this issue

Director’s corner	1
Researcher Workshop	1
Natalie Lu	4
Researcher news	5

Director, continued from Page 1

research priorities of the SSA. To this end, the center established a collaboration with Charles R. Drew University of Medicine and Science (CDU) and RAND to offer a two-part workshop series. The workshops aim to mentor, train, and provide research support for early- and/or mid-career researchers from underrepresented backgrounds. The goal is to help these researchers develop successful and impactful careers in retirement and disability policy research.

The choice of CDU as a partner for MRDRC is strategic: CDU's designation as a minority-serving institution, alongside its status as a Historically Black Graduate Institution and Hispanic Serving Institution, aligns with the center's objectives of fostering inclusivity in academic research. Moreover, CDU's strengths in health disparity research, with a strong focus on community engagement, create important synergies with our existing research network.

The center has launched the MRDRC-CDU-RAND Collaborative Research Development Initiative to provide accessible training opportunities to new scholars with interest in retirement, aging, and disability research.

This initiative's highlight is a collaborative workshop at CDU, designed for extensive interaction. The event will bring together more than 10 CDU researchers and seasoned RDRC researchers from RAND. In the spirit of forging connections, the workshop will start with a "researcher speed-dating" event introducing participants' research interests and seeding potential collaborations.

Prominent on the training agenda is a comprehensive exploration of SSA's research focal areas. There, experienced RDRC investigators will provide examples of new research questions that align with the program's mission. The ensuing breakout sessions, each steered by a senior mentor, will feature in-depth discussions and germinate nascent research teams founded on diverse perspectives.

Further enriching the dialogue, panel discussions will focus on how to integrate these diverse perspectives into SSA-related research, with particular attention to diverse methodological approaches across a spectrum of research designs. The goal here is to provide actionable guidance for researchers and to navigate the research complexity, timing, and

See Director, continued on Page 3


Director, continued from Page 3

budget constraints.

Moving beyond research design and execution, additional panels will involve the CDU researchers in formulating strategies for disseminating SSA-related research findings into underserved communities.

The workshop training stage will be followed by intensive mentoring for proposal development. A team of mentors from RAND will offer comprehensive assistance, fostering formation of proposal teams and developing project ideas. This stage will facilitate development of two to three CDU-collaborative proposals. The process will feature soliciting abstracts on candidate topics and opportunities to present research design ideas and receive

feedback. MRDRC/RAND mentors will then select projects to move forward using specified criteria (alignment with SSA focal areas, significance of topic, strength of analytic approach), and offer comments on proposal drafts. The resulting two to three joint projects with CDU will be submitted as quick turnaround projects in Fall 2024.


Ultimately, this initiative exemplifies the center's dedication to fostering an environment where diversity is not just included, but used as a catalyst for new research designs and societal impact. Partnering with CDU is a strategic choice by MRDRC to nurture a diverse cohort of researchers and enhance the understanding of retirement and disability policy through an array of perspectives. 

Associate commissioner addresses workshop

The MRDRC Researcher Workshop was fortunate to have Natalie Lu, SSA's Associate Commissioner, Office of Research, Evaluation and Statistics (ORES), offer opening comments. Lu provided an overview of ORES' mission and the upcoming FY25 priority memo.

Through its Retirement and Disability Research Consortium (RDRC), ORES provides research and evaluation of topics relevant to SSA; dissemination

of that research to all stakeholders, training for the next generation of researchers, and support for evidenced-based policy.

Lu also noted that the workshop agenda covered many of the FY24 priority memo topics and called out the panels as positive examples of MRDRC's responsiveness. She also provided an overview of SSA's proposal process. 

Workshop, continued from Page 1

investigators who have related interests, but who have not yet had a project with us. This year, the center invited three such scholars to present their work: Mike Mueller-Smith (University of Michigan), “Criminal Justice Involvement and Well-being in Old Age”; Paul Mohnen (Federal Reserve Bank of Atlanta), “Long-run Intergenerational Effects of Social Security”; and Sarah Miller (University of Michigan), “Medicaid and Mortality: New Evidence from Linked Survey and Administrative Data.” The newcomers engaged with long-time MRDRC participants and learned about SSA’s priorities and, through the panels, the center’s recent initiatives.

Community-engagement

This panel included University of New Hampshire’s Debra Brucker, University of Michigan’s Amanda Sonnega, and CDU's Shervin Assari. Brucker (with UNH collaborators) and Sonnega with Assari have FY24 projects involving CER and/or CED.

Brucker’s presentation focused on community engagement in disability research. She began the panel by explaining that CER involves the community of interest in all phases, from developing research questions to disseminating findings back to the community members. She discussed how the research methods involve the community as a unit, build on its strengths, and promote learning and action that benefit both researchers and community members. As part of the University of New Hampshire’s Institute on Disability, Brucker and her colleagues, Megan Henly and Andrew Houtenville,

are drawing on long-standing relationships with community-based organizations to complete their FY24 qualitative project, “**Community-engaged Research into the Barriers and Communication Preferences of Rural Populations**” (UM24-06).

Assari discussed community-engaged research’s roots in poor and/or minority communities’ many past, negative interactions with researchers. He explained that CDU has practiced CER within, primarily, Black and Latino communities since its founding in 1966. Since then, CDU has worked on developing and maintaining relationships with nongovernmental organizations (NGOs) and fostering long-standing programs such as the Community Forum, a monthly meeting where researchers share findings with the community. In addition, NIH has recently funded two additional community-engagement programs with CDU.

Assari discussed how he and Sonnega were incorporating CER into their FY24 project, “**An Intersectional Approach to Retirement Expectations and Timing**,” by presenting at CDU’s Community Forum and collaborating with Healthy African American Families, an NGO focused on well-being within the Black community.

The panel also discussed some of the challenges of CER and CED, especially given SSA’s one-year project cycle. Building trusting relationships with a given community takes time and makes a one-and-done project model inefficient.

“If we didn’t have these connections, we would probably need a year, at least, to make the

See Workshop, continued on Page 6

News from MRDRC researchers

Journal publications

The open-access *Security Journal* published Marguerite DeLiema and Paul DeWitt's article, **“Profiling consumers who reported mass marketing scams: demographic characteristics and emotional sentiments associated with victimization,”** in its September 2023 edition. The work is based on DeLiema and Witt's 2021 project **“Mixed-methods Analysis of Consumer Fraud Reports of the Social Security Impostor Scam”** (UM21-Q1)

Lila Rabinovich and Francisco Perez-Arce's article, **“Mixed-Methods Study to Understand Public Use of Social Security's Online Platform,”** appeared in the *Social Security Bulletin*, Vol. 83, No. 4. The piece is based on Rabinovich and Perez-Arce's FY21 project of the same name (UM21-08). MRDRC researchers often publish their work in the Bulletin, and the center encourages them to do so.

The Journal of the Economics of Ageing published Michael Hurd and Susann Rohwedder's **“Spending trajectories after age 65 variation by initial wealth”** in October 2023. The paper's research was funded by Insight Investment, but was based on projects funded by the NIA and SSA (UM21-10).

In January, Bernard Black, Eric French, Jeremy McCauley, and Jae Song's article, **“The effect of disability insurance receipt on mortality,”** found

a home in the *Journal of Public Economics*. The article draws from French's 2017 MRDRC project with Cormac O'Dea, **“Intergenerational Transfers, Wealth Accumulation and inequality”** (UM17-15).

Media

The FY21 Michael Hurd, Péter Hudomiet, and Susann Rohwedder study, **“Explanations for the Decline in Spending at Older Ages,”** challenged the idea, common among financial planners, that retirement spending remains constant across the aging process. That made it a popular citation in news and opinion columns from the time of its publication through 2023. Andrew Biggs recently cited it in his Forbes column, **“Who Killed Retirement Security?,”** and Rae Hartley Beck mentioned it on MSN.com in, **“A \$1.5 Million Annuity Will Get You This Much Annually.”** The last article also appeared on Yahoo! Life.

Another FY21 project, Amanda Sonnega and Brooke Helppie McFall's **“The Relationship between Adverse Experiences over the Life Course and Later-life Retirement Due to Disability”** (UM21-07), got a flurry of media mentions including a story on GoBankingRates, **“Early Life Traumas Lead to Early Retirement, Study Finds,”** which was also cited on **MSN.com's Money** page.

Researchers are encouraged to share academic publications, media coverage, and conference presentations of their MRRC/MRDRC-funded work. Please send announcements to mrdrumich@umich.edu.

Workshop, continued from Page 3

connections.” Brucker said. “I guess my question would be, is that a fundable activity for groups that are trying to do this?”

Assari pointed out that there are different levels of community engagement and suggested that researchers leverage their home institution’s existing relationships with NGOs. He also shared that the slower pace of CER may not be workable for assistant professors facing tenure pressures.


The project development process also flips with CER, as the community, along with the researcher, decides what to study, and the panel discussed how this model might map to the typical RDRC process of researchers developing projects in response to SSA’s annual priority memo.

One possibility would be to partner with an NGO, many of which have broad missions.

“They want just to serve communities of color and increase their well-being,” Assari said. For example, “they are very open if you want to do [research on] disability reduction...they are usually fine as long as they contribute to [the project].”

Partnership with Charles Drew University

Susann Rohwedder (RAND), Phil Armour (RAND), and Roberto Vargas (CDU) introduced the new training partnership between RAND, CDU, and MRDRC. (See Dmitriy Stolyarov’s “Director’s corner” for more details on this initiative.)

As the CDU initiative matures, MRDRC anticipates that other researchers in its network may be interested in participating. Stay tuned for updates on how the program grows. 



The Michigan Retirement and Disability Research Center is supported by a cooperative agreement with the Social Security Administration.

Keep in touch

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