Agenda

ANNUAL MEETING

NC 2172 Household Financial and Health Decision-making Under Economic Uncertainties

<https://nimss.org/projects/view/mrp/outline/18981>

April 18 – 19, 2024

California State University Long Beach Campus

HYBRID (Zoom 9am - 12pm, In-Person 9am – 5pm)

**April 18**

* Arrive in Long Beach
* Dinner & Network
* Hotel: Ayres Hotel Fountain Valley

17550 Brookhurst Street, Fountain Valley, CA 92708
(714) 861-5170

**April 19**

**9 am – 12 pm Hybrid**

**Zoom:** [**https://csulb.zoom.us/j/89691624433**](https://csulb.zoom.us/j/89691624433)

**In Person: University Student Union, Laguna Room (2nd Fl.) California State University Long Beach, 1250 Bellflower Blvd. Long Beach CA 90840**

1. Call to Order – started meeting at 9:15 am (PT)
	1. Attendees
		1. Soo Hyun Cho
		2. Congrong Ouyang
		3. Tim Griesdorn
		4. Sharon DeVaney
		5. Sheri Worthy
		6. Yi Liu
		7. Yulia Zhang
		8. Bidisha Mandal
		9. Nilton Porto
		10. Lorna Saboe-Wounded Head
		11. Swarn Chatterjee
		12. Yilan Xu – left at 10 am
		13. Jiyun Kang
		14. Wookjae Heo
		15. Brandan Wheeler – joined at 10 am
2. Connection and Networking
	1. Each attendee shared updates and current research projects.
3. Purpose and Goals for the Meeting
	1. Review project objectives.
	2. Report on work that has been completed.
4. Report from Administrative Advisor (Carrie Johnson, Ph.D., North Dakota State University)
	1. Encouraged everyone to submit a report (individually) if have an AES appointment annually. Contributing to the 5-year NC2172 report.
	2. As a group we need to report annual meeting results within 60 days (June 19th) to Carrie Johnson.
	3. Election of Secretary needs to occur during this annual meeting.
	4. What are the health decision making research areas we are focusing on?
	5. Sheri Worthy asked if individuals with an AES appointment were aware of the ARS115 Form that needed to be completed.
5. Dropbox – Soo will clean up the members of the Dropbox by inviting new members and deleting non-active members.
6. NIMSS website <https://nimss.org/projects/18981> (need to log in to site)
	1. NIFA representatives are Charlotte Tuttle and Keith Harris – invite to a future monthly meeting
7. 2023 – 2028 Project Review and Ongoing Project
	1. What have we been doing? For 2023 report:
		1. Holistic well-being approach – Tim and others
		2. Covid survey data, under review with FSR, social determinants of health and positive financial behaviors – Sheri and Yulia
		3. Wells Fargo data, financial self-efficacy, help seeking and financial stress – Yulia and Sheri
		4. Wells Fargo data, financial self-efficacy, life satisfaction – Soo will do a presentation at ACCI
		5. American Life Panel data – on-line grocery shopping – Elizabeth, Soo, Lorna Wookjae, Swarn
8. Break
9. New project – Soo will send out a list of projects, that everyone can sign up to work on.
	1. Data sets
		1. Wells Fargo
		2. Covid data – consensus was that the data needed for be utilized soon to be relevant research; would need to focus on how the data implies how to over-come from a crisis and resiliency.
		3. New survey – college students
		4. Rand American Life Panel
	2. Holistic well-being approach
	3. Health Decision Making
		1. <https://www.brookings.edu/articles/how-financial-volatility-impacts-health-care-decisions-what-we-dont-know-is-hurting-us/>
		2. HRS survey may be useful in understanding Medicare use for prescriptions (Bidisha)
		3. ALP – Health related variables
			1. <https://alpdata.rand.org/>
				1. Need to log on, free access
	4. New Survey – hold off for now
10. Sub-groups
	1. Qualtrics
		1. Nilton
		2. Tim
		3. Lorna
		4. Swarn
	2. ALP - omnibus
		1. Bidisha
		2. Brandon
		3. Nilton
	3. Wells Fargo
		1. Swarn
		2. Lorna
		3. Brandon
11. Business
	1. Officer Election – Secretary
		1. Brandon Wheeler will serve a second term as secretary.
	2. Meeting Schedule for 2024-25
		1. Will continue meeting on the second Friday of the month at 2 pm (ET).
			1. Not meet in July.
	3. 2025 Annual Meeting
12. Adjourn for Hybrid/ Zoom meeting at 12:11 pm (PT)

**12 pm to 5pm In-Person**

1. Lunch on own and tour of CSULB campus

Resumed meeting a 1:45 pm (PT)

1. Small group – writing retreat
2. Share and report of the writing groups
	1. ALP omnibus surveys exploration (Bidisha leads)
	2. Qualtrics Data – Focus on Food Insecurity (Lorna, Soo)
	3. Qualtrics Data – Focus on income expectations and volatility (Nilton)
	4. Wells Fargo Data – Financial Stress & Responsible Health Behavior (Jiyun & Wookjae)
	5. Wells Fargo Data – underutilized variables (Swarn)
	6. NCRCRD (North Central Regional Center for Rural Development) data set (Jiyun & Wookjae)

The subgroup will submit the Appendix A (Declaration of Dataset Use) to chair via email prior to May meeting. Other members encouraged to contact project leaders if interested. Also, anyone can form additional subgroup with variables of interest.

1. Announcements for the group – possible outlets
a. AFS/FSR joint conference – proposal due May 31, 2024
b. AFCPE conference- proposal due May 10th, 2024
c. ACCI Symposium 2025
2. Adjourned at 5:15pm

**\*NC 2172 Objectives**

1. Understanding family and consumer financial and health decisions under economic uncertainties.
2. Identifying personal or household characteristics and other contextual factors contributing to household financial and/or health decisions and well-being.
3. Assessing the role of financial capability, healthcare access, and inequalities on household decision-making and well-being.
4. Applying the framework of behavioral economics to inform policy making to improve household well-being.