April 2018

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1. ACADEMIC BACKGROUND

Ph.D., Economics, Massachusetts Institute of Technology, 1987
B.A., Economics, Wellesley College, 1982

2. PRESENT AND PAST POSITIONS

Professor of Economics, Michigan State University, July 1, 2000 to present.
Visiting Scholar, Survey Research Center, May 24 2013 to May 23, 2014.
Visiting Professor of Economics, University of Michigan, January 15, 2012-August 15, 2012
Graduate Director, Michigan State University, August 2009 to August 2011, August 2012 to August 2014.
Associate Professor of Economics, Michigan State University, July 1, 1994 to June 30, 2000.
Assistant Professor of Economics, Michigan State University, September 1, 1991 to June 30, 1994.
Visiting Assistant Professor of Applied Economics, Sloan School of Management, MIT, September 1, 1989 to June 30, 1990.
Aging Fellow, National Bureau of Economic Research, Cambridge MA, September 1, 1988 to August 30, 1989.
Assistant Professor of Finance and Economics, School of Management, Boston University, July 1, 1987 to August 31, 1991.

3. BIBLIOGRAPHY

A. Journal Articles

"Interstate Differences in Pension Vesting Rules and K-12 Teacher Experience," (joint with Daniel Litwok), *Proceedings of the National Tax Association*, November 21-23, 2013.

"Panel Data Methods for Fractional Response Variables with an Application to Test Pass Rates" (with J.M. Wooldridge), *Journal of Econometrics* 145, 121-133, July 2008.

"The Effects of Changes in Michigan's School Finance System," *Public Finance Review* 36, 456-474, July 2008.

"Retirement Security for Women: Progress to Date and Policies for Tomorrow," (with Lina Walker and Michael Dworsky), The Retirement Security Project No. 2008-1.

"Pension Funding and State Government Finances: Back in the Black or Trouble Ahead?" (with Fred Giertz), *National Tax Journal* 60, 305-323, June 2007.

"The Effects of Spending on Test Pass Rates: Evidence from Michigan," *Journal of Public Economics* 89, 821-839, 2005.

"A Computational Trick for Delta-method Standard Errors" (with J.M. Wooldridge), *Economics Letters* 86, 413-417, 2005.

"Choice and Other Determinants of Employee Contributions to Defined Contribution Plans," *Social Security Bulletin* 65, 59-68, 2004.

"Michigan's Experience with Public Pension Plan Choice," *National Tax Journal Proceedings of the Ninety-Seventh Annual Conference,* 420-425, 2004.

"Pension Plan Choice in the Public Sector: The Case of Michigan State Employees," *National Tax Journal* 57, 329-339, June 2004.

"Individual Financial Decision in Retirement Saving Plans: The Role of Participant-Direction," *Journal of Public Economics* 88, 39-61, January 2004.

"The Indiana Enterprise Zone Revisited: Effects on Capital Investment and Land Values," *National Tax Association Proceedings of the Ninety-Third Annual Conference*, 83-87, 2001.

"One-Way Treaty with the World: The U.S. Withholding Tax and the Netherlands Antilles" *International Tax and Public Finance* 7, 295-313, May 2000. Reprinted in *International*

Taxation, James R. Hines and Richard A Musgrave, eds.,Edward Elgar Publishing Ltd., U.K, 196-214, 2007.

"The Influence of Taxes On Employment And Population Growth: Evidence from the Washington, D.C. Metropolitan Area" (with S.T. Mark and T.J. McGuire), *National Tax Journal* 53, 105-119, March 2000.

"Local Government Responses to Education Grants" (with R.C. Fisher), *National Tax Journal* 53, 153-168, March 2000.

"Are 401(k) Plans Replacing Other Employer-Provided Pensions? Evidence from Panel Data," *Journal of Human Resources* 34, 346-368, Spring 1999.

"How Are Participants Investing Their Accounts in Participant-Directed Individual Account Pension Plans?" *American Economic Review* 88, 212-216, May 1998.

"Quantifying the Substitution of 401(k) Plans for Defined Benefit Plans: Evidence from Ongoing Employers," *National Tax Association Proceedings of the Eighty-Ninth Annual Conference*, 136-144, 1997.

"Econometric Methods for Fractional Response Variables with an Application to 401(k) Plan Participation Rates" (with J.M. Wooldridge), *Journal of Applied Econometrics* 11, 619-632, November-December 1996.

"Survey Evidence on Employer Match Rates and Employee Saving Behavior in 401(k) Plans" (with J.M. Poterba), *Economics Letters* 49, 313-317, 1995.

"Participation in and Contributions to 401(k) Pension Plans: Evidence from Plan Data," *Journal of Human Resources* 30, 311-325, Spring 1995.

"Does 401(k) Introduction Affect Defined Benefit Plans?" *National Tax Association Proceedings of the Eighty-Seventh Annual Conference*, 173-177, 1995.

Discussion: "New Research on How Taxes Affect Economic Development," *National Tax Association Proceedings of the Eighty-Sixth Annual Conference*, 122-123, 1994.

"Tax Policy and Urban Development: Evidence from the Indiana Enterprise Zone Program," *Journal of Public Economics* 54, 37-49, May 1994.

Discussion: "Public Sector Pensions: Benefits, Funding, and Unionization," by O. Mitchell and R. Smith, *IRRA Proceedings of the Forty-Fourth Annual Meeting*, 143-145, 1992.

"Interstate Business Tax Differentials and New Firm Location: Evidence from Panel Data," *Journal of Public Economics* 45, 47-68, June 1991.

“State-Local Tax Concessions as Urban Redevelopment Tools: Incentives, Subsidies or Windfalls?” (with J.A. Papke), in *NTA-TIA Proceedings of the Eighty-Third Annual Conference on Taxation*, 215-225, 1990.

“Taxes and Other Determinants of Gross State Product in Manufacturing: A First Look,” in *NTA-TIA Proceedings of the Eighty-Second Annual Conference on Taxation*, 274-282, 1989.

“Subnational Taxation and Capital Mobility: Estimates of Tax-Price Elasticities,” *National Tax Journal* 40, 191-203, June 1987.

“Measuring Differential State-Local Tax Liabilities and Their Implications for Business Investment Location” (with J.A. Papke), *National Tax Journal* 39, 357-366, September 1986.

“The Location of New Manufacturing Plants and State Business Taxes: Evidence from Panel Data,” *NTA-TIA Proceedings of the Seventy-Ninth Annual Conference*, 44-55, 1986.

B. Book Chapters

“The Local Funding of Schools: The Property Tax and Its Alternatives” (with Therese J. McGuire and Andrew Reschovsky), *Handbook of Research in Education Finance and Policy 2e*. H.F. Ladd and E.B. Fiske (eds.), January 2015.

“Retirement Security for Women: Progress to Date and Policies for Tomorrow,” (with Lina Walker and Michael Dworsky), in *Automatic: Changing the Way America* Saves, W.G. Gale, J. M. Iwry, D.C. John, and L. Walker, (eds.). Washington D.C., Brookings Institution Press, 2009.

“The Local Funding of Schools: The Property Tax and Its Alternatives” (with Therese J. McGuire), *Handbook of Research in Education Finance and Policy*. H.F. Ladd and E.B. Fiske (eds.). Routledge, 357-372, 2008.

“The Shifting Structure of Private Pensions: Evidence, Causes, and Consequences” (with W.G. Gale and J. VanDerhei). In *The Evolving Pension System: Trends, Effects, and Proposals for Reform*, W.G. Gale, J.B. Shoven, and M.J. Warshawsky, eds.,Washington D.C.: Brookings Institution, 51-76, 2004.

“Public Pensions and Pension Policy in Michigan,” in *Michigan at the Millennium*, C.L. Ballard, P. Courant, D. Drake, R.C. Fisher, E. Gerber, eds., Michigan State University Press, 413-434, 2003.

“Do 401(k) Plans Replace Other Employer Provided Pensions?” (with M. Petersen and J.M. Poterba), in *Advances in the Economics of Aging*, D. Wise, ed., NBER, University of Chicago Press, 219-239, 1996.

“What Do We Know About Enterprise Zones?” in *Tax Policy and the Economy*, Volume 7, J.M. Poterba, ed., NBER, MIT Press, 37-72, 1993.

“The Asset Allocation of Private Pension Plans,” in *Trends in Pensions* 1992, J. Turner and D. Beller, eds., U.S. Department of Labor, Pension and Welfare Benefits Administration, 449-481, 1992.

"Pension Fund Finance" (with Z. Bodie), in *Pensions in the U.S. Economy: Sources, Uses and Limitations of Data*, Z. Bodie and A. Munnell, eds., Philadelphia: University of Pennsylvania Press, 149-180, 1992.

"The Responsiveness of Industrial Activity to Interstate Tax Differentials: A Comparison of Elasticities," *Industry Location and Public Policy*, H. Herzog and A. Schlottmann, eds., University of Tennessee Press, 120-134, 1991.

C. Book Reviews and Miscellaneous

Commentary on “Nontraditional Public School Funding Sources: Trends, Issues, and Outlook,” by Henry A Coleman. Forthcoming May 2014 in Education, Land, and Location, Gregory K. Ingram and Daphne A. Kenyon, Lincoln Land Institute.

Book Review of *The Future of Public Employee Retirement Systems*, Olivia S. Mitchell and Gary Anderson, eds. *Journal of Pension Economics and* Finance, Volume 10, No. 4, pp. 671-673.

“Reflections on 100 Years of the National Tax Association,” forthcoming, National Tax Journal.

“Enterprise Zones,” in *The New Palgrave Dictionary of Economics, 2nd Edition,* edited by S.Durlauf and L. Blume, Palgrave Macmillan (Basingstoke and New York), 2009.

Discussion of “Employee Use of the Empowerment Zone Tax Credit,” by Andrew Hanson, National Tax Journal.

Discussion of “Asset Location for Retirement Savers,” by Poterba, Shoven, and Sialm, in William G. Gale, John B. Shoven and Mark J. Warshawsky, eds. *Private Pensions and Public Policies*, Washington: D.C., Brookings Institution, 326-331, 2004.

“The Indiana Enterprise Zone Revisited: Effects on Capital Investment and Land Values,” *State Tax Notes*, April 9, 2001, 1299-1303.

“Enterprise Zones," entry in *Encyclopedia of Taxation and Tax Policy*, J.J. Cordes, R.D. Ebel, and J.G. Gravelle, eds. Urban Institute Press, 1999, 97-100, revised 2004.

Book review of *The Economic Effects of Aging in the United States and Japan*, M.D. Hurd and N.Yashiro, eds., in *Journal of Economic Literature* 36, 972-974, June 1998.

"The Substitution of 401(k) Plans for Defined Benefit Pension Plans," in *Profit Sharing* 46, Number 3, 8-11, May/June 1998.

"Should I Divert Unmatched 401(k) Contributions to a Roth IRA?" Profit-sharing and 401(k) Council website: http://www.psca.org/papke.html

"Is the Roth IRA the Better IRA?" *Tax Notes*, page 1,741, March 30, 1998.

"What Do We Know About the Effect of Taxes on Economic Development? Lessons from the Literature for the District of Columbia" (with S.T. Mark and T.J. McGuire), *State Tax Notes*, 493-510, August 25, 1997.

"Tax and Spending Incentives and Enterprise Zones," *New England Economic Review*, 135-137, March/April 1997.

Book review of *Labor's Capital: The Economics and Politics of Private Pensions*, by T. Ghilarducci, in *Industrial and Labor Relations Review* 47, 714-715, July 1994.

Book review of *Canada-U.S. Tax Comparisons*, J.B. Shoven and J.Whalley, eds., in *Comparative Economic Studies* 36, 95-97, Spring 1994.

D. Working Papers

"Interstate Differences in Pension Vesting Rules, K-12 Teacher Experience, and Teacher Exit," under revision, (joint with Daniel Litwok).

"Retirement Options and Outcomes for Public Employees," underway

"Identifying State and Local Public Sector Workers in the Health and Retirement Study"

4. AWARDS AND HONORS

Top 5 percent average rank score, RePEc (4/4/18).

Program Co-chair, National Tax Association 107th Annual Conference on Taxation, November 13-15, 2014.

Co-Winner (with J.M. Wooldridge) of the Richard Stone Prize in Applied Econometrics for 1996-1997. Awarded by the *Journal of Applied Econometrics*.

Employee Benefit Research Institute Fellows Program Associate, 1994 to present.

National Bureau of Economic Research/NIA Health and Aging Fellow, September 1, 1990 to August 31, 1991.

National Bureau of Economic Research Faculty Research Fellow, 1989 to1997.

National Science Foundation Graduate Fellowship, 1982-1985.

Durant Scholar, Wellesley College, 1982.

5. OTHER ACTIVITIES

A. Academic and Other Memberships

Board of Directors, National Tax Association, 1991 to 1994, 2014 to present.
American Economic Association
National Tax Association
International Institute of Public Finance
Employee Benefits Research Institute Fellow
American Association of University Women
Profit-Sharing and 401(k) Education Foundation Trustee
Research Affiliate, Michigan Retirement Research Center
National Poverty Center the Gerald R. Ford School of Public Policy at UM, Research Associate
Michigan Census Research Data Center at the University of Michigan, Board Member

Editorial Advisory Board, *National Tax Journal*
Editorial Board, *Journal of Pension Economics and Finance*
Editorial Advisory Board, *International Tax and Public Finance*

B. Refereeing

American Economic Review
Economic Development Quarterly
Economic Inquiry
Education Finance and Policy
Financial Management
The Financial Review
Industrial and Labor Relations Review
Industrial Relations
International Tax and Public Finance
Journal of Human Resources
Journal of Pension Economics and Finance

Journal of Policy Analysis and Management
Journal of Public Economics
Journal of Urban Economics
National Tax Journal
Quarterly Journal of Economics
Rand Journal of Economics
Regional Science and Urban Economics
Review of Economics and Statistics
Urban Studies

Lincoln Land Institute
Michigan Census Research Data Center
National Science Foundation
Social Sciences and Humanities Research Council of Canada
Social Security Administration
University of Chicago Press

C. Grants

"Determinants of Employee Contributions to Defined Contribution Plans: The Role of Pension Plan Features and Contribution Limits," Center for Retirement Research at Boston College, October 2001 – December 2003.

"Michigan K-12 Funding Reform: Effects on Inputs and Outcomes," funded by MSU's Michigan Applied Public Policy Research Program, April – September 1998.

Department of Labor Contract No. PJ-9-P-5-0074, Title: How are Participants Investing Their Accounts in Participant-Directed Individual Account Pension Plans?, October 1995 - August 1997.

Department of Labor Contract No. 41USC252C3, Title: The Effect of 401(k) Introduction on Defined Benefit Plans, August 1995 - August 1996.

Department of Labor Contract Number J-9-P-8-0097 (joint with Zvi Bodie), Title: Pension Fund Finance, 1988-1990.

6. TEACHING EXPERIENCE

1991-	Michigan State University: Senior Seminar, Public Revenues, Public Expenditures, Survey of Public Economics, State and Local Public Finance, Analysis of Economic Data, Intermediate Microeconomics, Honors Microeconomics and Public Policy (undergraduate), Managerial Microeconomics (MBA), Economics of Education (graduate); Quantitative Methods 3, Public Finance (Masters of Public Policy)
1989-90	Sloan School of Management, MIT: Microeconomics (MBA).
1987-89	School of Management, Boston University: Managerial Economics (Undergraduate), Public Finance (MBA).