

2017 - 2018

ANNUAL REPORT

SOCIAL SECURITY
ADVISORY BOARD



Message from the Board

The Social Security Advisory Board's ("Board") mission is to provide the President, Congress, and the Commissioner of Social Security, bipartisan advice and guidance with respect to how the Social Security and Supplemental Security Income (SSI) programs supported by other public and private systems can most effectively assure economic security. This *Annual Report* summarizes the Board's work during calendar year 2017 through fiscal year 2018. This report includes detailed information regarding Board highlights and summarizes meetings held by the Board, including those with Social Security Administration (SSA) executives and staff and Board member visits to SSA offices across the nation.

The Board is grateful to the Acting Commissioner of Social Security, Nancy Berryhill, SSA employees, Congressional staff, and the many stakeholders and experts who provided their valuable insights and experiences in support of the Board's efforts.

Highlights

During this reporting period, the Board continued its review of the representative payee program, hosting two forums and issuing a report entitled, *Improving Social Security's Representative Payee Program*, with an accompanying interactive chart collection. The Board further examined SSA's approach to research, soliciting suggestions for a long-range research agenda from scholars and experts through a roundtable discussion in August 2017 and publishing a summary of those recommendations. The Board submitted statements regarding work incentive efforts for adults and initiatives aimed to support young people receiving SSI for inclusion in SSA's 2017 and 2018 annual statement on the SSI Program.

Following the Board's spring 2016 commissioning of a panel of five prominent labor economists to evaluate the assumptions and the methods about projections of the labor force size and rates of labor force participation, the technical panel released its final report, *Technical Panel on Labor Force Participation: Final Report to the Social Security Advisory Board*. In June 2017, panel chair Robert Moffitt presented the panel's recommendations to the Board.

Throughout 2018, the Board worked to establish the 2019 Technical Panel on Assumptions and Methods, including the selection of the chair, determining potential topics for panel review, and developing the panel's charter. In October 2018, the Board announced the establishment of the panel, whose final report is expected in September 2019.

After a unanimous Board agreement to examine SSA's (IT) systems as a top priority, the Board has been working on the convening of an independent expert panel to review and monitor SSA's implementation of their information technology systems modernization plan, among other systems initiatives. Following the announcement of panel members, expected in the final quarter of fiscal year 2019, the panel will begin its deliberations.

¹ The Board's annual reporting period is transitioning to fiscal year, so this report covers the Board's activities in calendar year 2017 through federal fiscal year 2018 ending September 30th.

Additional developments

Board membership continued its transition cycle throughout the reporting period. Congresswoman Barbara B. Kennelly completed her term of office on September 30, 2017, after ten years of service, including service as acting chair for two three-year terms. Nancy J. Altman was then appointed to replace Barbara beginning October 1, 2017. Both Bernadette Franks-Ongoy and Lanhee Chen completed their terms of service on September 30, 2018. The President designated Kim Hildred as Board Chair on June 29, 2017, following Dr. Henry Aaron's exemplary service as Board Chair (since September 2014). In November 2018, Bob Joondeph was appointed to the Board by the President pro tempore of the Senate to replace Bernadette Franks-Ongoy.

Like all micro agencies, the Board is challenged to complete its mission while facing ever-increasing statutory requirements, particularly those related to information technology and system security. The Board looks forward to working with the Congress, the Office of Management and Budget, and the Commissioner of Social Security to define approaches to address resulting rising costs and needed systems expertise.

*Kim Hildred, Chair • Henry J. Aaron
Jagadeesh Gokhale • Nancy J. Altman • Bob Joondeph*



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I. The Board's review of current social security administrative and program concerns

SSA's representative payees

In 2017 and 2018, the Board continued its examination of the representative payee program by holding two public forums, publishing a report including recommendations to SSA, Congress and the Office of Management and Budget, releasing a collection of charts with a visual representation of data, and funding an independent study of the representative payee program.

The Board applauds the passage of the *Strengthening Protections for Social Security Beneficiaries Act of 2018 (P.L. 115-615)* that became law in April 2018. The statute aligns with many of the Board's prior findings and recommendations. The bill made changes to the representative payee program by strengthening oversight and beneficiary protections and directing SSA to study the representative payee selection and quality review processes.

Forum: *Joining Forces to Improve the Representative Payee Program*

On March 27, 2017, the Board hosted a public forum to discuss SSA's representative payee program, examining issues related to the selection, administration and monitoring of the program. Approximately 130 attendees representing organizational payees, advocacy groups, researchers, and program administrations gathered to provide insights and exchange views and experiences.

Board Chair Henry Aaron, opened the forum by welcoming attendees and introducing a video of Chairman Sam Johnson, House Ways and Means Subcommittee on Social Security. Chairman Johnson expressed Congress' concerns for the program which resulted in a joint hearing of the House Ways and Means Social Security Subcommittee and the Oversight Subcommittee. Chairman Johnson challenged participants to address whether SSA's payee program functions as well as it should, whether SSA is improving the program to meet today's challenges and what other changes are needed to ensure Americans receive the services they expect and deserve.

The focus of the first panel was to: 1) sound the alarm on the increasing concerns regarding the representative payee selection and monitoring processes, and 2) draw attention to the increasing need for payees in the future due to demographic changes and declining health of older adults. Board Chair Aaron moderated the first panel. Panelists included:

- **Duke Han** - Diplomate, American Board of Professional Psychology, Director of Neuropsychology, Department of Family Medicine, and Associate Professor of Family Medicine, Neurology, Psychology, and Gerontology, University of Southern California
- **Robert Weathers** - Supervisory Economist, Office of the Chief Actuary, Social Security Administration



After the first panel, Kathryn Olson, Democrat Staff Director of the House Ways and Means Subcommittee on Social Security, provided remarks on behalf of Rep. John Larson, the Ranking Member on the House Ways and Means Social Security Subcommittee. Olson expressed bipartisan support and a commitment to collaboration for improving the representative payee program. She mentioned the need to strengthen the predictive model that SSA uses to select organizational payees for review and voiced interest in revisiting SSA's work with advocates, namely those associated with the protection and advocacy system.

The forum's second panel addressed multiple representative payee issues, including the evaluation of beneficiary financial capability, detecting changes to individuals' capability over time, assessing SSA's capability determinations and ways to maintain beneficiary autonomy. Board member Bernadette Franks-Ongoy moderated the panel. Panelists included:

- **Geoffrey Sanzenbacher** - Research Economist, Center for Retirement Research, Boston College
- **Paul Appelbaum** - Elizabeth K. Dollard Professor of Psychiatry, Medicine, and Law and Director, Division of Law, Ethics, and Psychiatry, Department of Psychiatry, College of Physicians and Surgeons, Columbia University
- **Ari Ne'eman** - Chief Executive Officer, MySupport.com and Policy Consultant, American Civil Liberties Union

The third panel covered issues relating to organizational payees interacting with SSA. The panelists provided insights on their respective organizations and made recommendations, particularly on improving processes. The panel was moderated by Board Member Franks-Ongoy. Panelists included:

- **Ed Doonan** - Chairman, Board of National Association of Organizational Representative Payees and Government Affairs Liaison, Benefits Management Corporation/Living in Familiar Environments
- **Susanne Horn** - Representative Payee Program Manager, Bread for the City
- **Lawrence L. Sharp, III** - Chief Executive Officer and Founder of SMILE Payee Services and Using Money Wisely

The purpose of panel four was to bring together panelists who have experience and insight regarding policies and procedures concerning representative payee monitoring programs and to offer suggestions for improving SSA's process. The panel was moderated by Board Member Kim Hildred. Panelists included:

- **Eric Ice** - Director, Office of Representative Payee and Due Process Policy, Social Security Administration
- **Cate Boyko** - Manager, Minnesota Judicial Branch Statewide Conservator Account Auditing Program.
- **Curt Decker** - Executive Director, National Disability Rights Network
- **Jim Klein** - Director, San Francisco Audit Division, Office of the Inspector General, Social Security Administration

The fifth panel's objective was to provide recommendations for improving inter-organizational communication and collaboration, gleaned lessons from other organizations with similar functions to SSA's representative payee program. Board Member Hildred moderated the panel. Panelists included:

- **Sally Hurme** - Board of Directors, National Guardianship Association
- **Matt Wiener** - Vice Chairman and Executive Director, Administrative Conference of the United States
- **Nyree Ryder Tee** - Assistant Director, Education, Workforce, and Income Security, Government Accountability Office
- **Gale Stallworth Stone** - Acting Inspector General, Social Security Administration

Board Chair Aaron drew the forum to a close by complimenting SSA on handling this enormous administrative task required with the representative payee program with limited resources. Before closing the forum, he also identified two broad categories the Board should address: 1) how to improve the program's functioning, and 2) modifying the statutory structure under which the program currently operates.

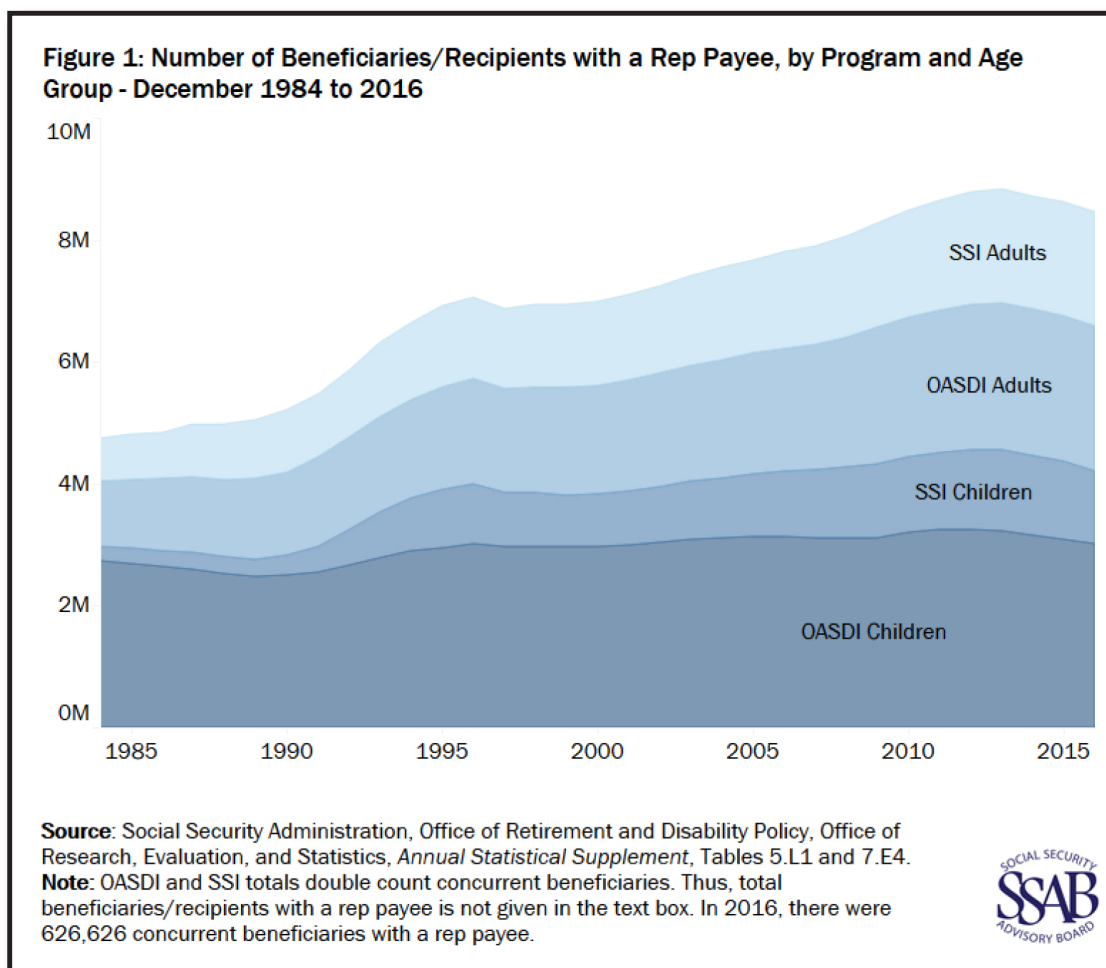
Report: *Improving Social Security's Representative Payee Program*

In January 2018, the Board released its report on the representative payee program, providing short-term recommendations to SSA and Congress to strengthen the program's administrative processes and create and define a more manageable monitoring role. The Board also advocated for the Office of Management and Budget to pursue long-term, comprehensive government-wide coordination and cross-agency reforms across multiple substitute decision-making benefit programs.

Representative payee chart collection

With the January 2018 report release, the Board published an interactive chart collection. The charts highlight data related to the administration of the program, while illustrating the growing need for payees in the future. Many of the 12 interactive charts are dynamic, allowing users to dictate the parameters of a figure by selecting a particular age group or program.

Figure 1: *Number of beneficiaries/recipients with a representative payee, by program and age group (December 1984-2016)*



Forum: *Moving Forward – Implementing Changes in the Representative Payee Program*

Following the passage of the *Strengthening Protections for Social Security Beneficiaries Act of 2018* (P.L.115-615), that became law in April 2018, the Board held a second public forum on September 7, 2018 to bring policymakers, practitioners and researchers together to explore how SSA can study and improve the representative payee selection process with an evidence-based approach.

The first panel moderated by Board Member Lanhee Chen, provided a historical overview of the representative payee program and summarized the recent legislation. Panelists included Amy Shuart, Majority Staff Director, and Kathryn Olson, Democrat Staff Director, House Committee on Ways and Means, Subcommittee on Social Security.

The second panel examined the administration of the payee program from the perspective of organizational payees. Panelists addressed inconsistencies in the capability and selection process, as well as the inherent conflict of interest with creditor payees. The discussion included how organizational payees are determined suitable to receive a fee and the agency's policies around replacing a payee. Moderated by Board Member Hildred, panelists included:

- **Christy Respress** - Executive Director, Pathways to Housing DC
- **Jerry Hynes** - Vice President of Payee Services, Skills'kin
- **Jennifer Flynn** - Senior Director, CrissCross Representative Payee Services, Money Management International
- **Kate Lang** - Senior Staff Attorney, Justice in Aging
- **Kathryn Olson** - Minority Staff Director, Subcommittee on Social Security, House Committee on Ways and Means
- **Amy Shuart** - Majority Staff Director, Subcommittee on Social Security, House Committee on Ways and Means
- **Mark J. Warshawsky** - Deputy Commissioner, Office of Retirement and Disability Policy, SSA



The third panel highlighted the importance of evidence-based policymaking, its potential application to payee policy, and the need for improving the collection of internal and external data, particularly those data necessary to evaluate program monitoring processes. Moderated by Board Chair Aaron, panelists included:

- **Jim Klein** - San Francisco Audit Division Director, Office of Inspector General, SSA
- **Peri Jude Radecic** - Chief Executive Officer, Disability Rights Pennsylvania
- **Pamela B. Teaster** - Professor and Director, Center for Gerontology, Virginia Polytechnic Institute and State University
- **Nick Hart** - Director, Evidence-Based Policymaking Initiative, Bipartisan Policy Center

Independent study: examining the selection process for representative payees

At the end of fiscal year 2018, the Board funded an independent study to examine the selection process of representative payees. Pamela Teaster is the principal researcher of this mixed-methods study. Erica Wood, Assistant Director at the American Bar Association's Commission on Law and Aging, and Laura Sands, Professor at Virginia Tech will assist Teaster with the study.

Research roundtable discussion: recommending SSA's research agenda

In 2017 and 2018, the Board began to examine how SSA makes research-related decisions. The Board held a roundtable discussion in August 2017 in Washington, DC, which included scholars and experts from around the country. This roundtable discussion solicited suggestions for a long-range SSA research agenda, and a discussion of the data needs that attendees believe are required. Board members, SSA executives, congressional staff, interested observers, and other stakeholders were in attendance. Scholars and other experts unable to attend submitted their written recommendations.

Most participants emphasized the need for additional investments in data infrastructure and greater access to and sharing of the administrative data necessary to address key research questions. Some recommended continuing the development of policy evaluation models and suggested disability demonstration projects. Other examples include:

- What factors contribute to the economic security or insecurity of retirees
- How changing patterns of work, health, retirement, asset, and debt accumulation and decumulation will affect the economic security of today's workers
- How SSA's communication with the public affects decision-making by workers, claimants, and beneficiaries
- How disabilities develop
- How SSA determines eligibility for disability benefits and what conditions are necessary for individuals to keep working or to return to work
- The reasons for, and implications of, recent downward trends in disability applications and awards

In November, the Board published a summary of the recommendations received from over 30 individuals who participated. While points in the published summary do not necessarily reflect or represent the views of individual members of the Board, they do highlight several issues both the public and SSA will find useful for consideration.

The roundtable participants were:

- **Peter Brady** - Senior Economist at Investment Company Institute
- **Melissa Favreault** - Senior Fellow at Urban Institute
- **Howard Iams** - Director, Division of Policy Evaluation, SSA, retired
- **Annamaria Lusardi** - Denit Trust Chair of Economics and Accountancy at George Washington University School of Business; Academic Director at Global Financial Literacy Excellence Center
- **Kathleen Mullen** - Senior Economist at RAND Corporation; Director of the RAND Center for Disability Research; Professor at Pardee RAND Graduate School
- **L. Scott Muller** - Economist at Office of Research Evaluation and Statistics, SSA, retired
- **John Phillips** - Associate Commissioner, Office of Research, Evaluation and Statistics, SSA
- **Sylvester Schieber** - Independent Economic Consultant, former chair of the Social Security Advisory Board
- **Julie Topoleski** - Chief, Long-Term Analysis Unit, Health, Retirement, and Long-Term Analysis Division at Congressional Budget Office
- **Paul Van de Water** - Senior Fellow at Center for Budget and Policy Priorities

The Board also received additional suggestions in writing from:

- **Romina Boccia** - Deputy Director, Thomas A. Roe Institute for Economic Policy Studies and Grover M. Hermann Research Fellow at Heritage Foundation
- **Gary Burtless** - Senior Fellow and John C. Nancy D. Whitehead Chair in Economic Studies at Brookings Institution
- **Courtney Coile** - Professor of Economics at Wellesley College; Director at Knapp Social Science Center; Associate Director at Retirement Research Center, National Bureau of Economic Research
- **Mark Duggan** - The Trione Director at Stanford Institute for Economic Policy Research; Wayne and Jodi Cooperman Professor at Department of Economics, Stanford University
- **Eric French** - Professor of Economics at University College London; Co-director at ESRC Centre for the Microeconomic Analysis of Public Policy (Institute for Fiscal Studies); Fellow at the Institute for Fiscal Studies and the Centre for Economic Policy Research

- **Gopi Shah Goda** - Deputy Director and Senior Fellow at Stanford Institute for Economic Policy Research, Stanford University
- **Rachel Greszler** - Research Fellow in Economics, Budget and Entitlements at The Heritage Foundation
- **Alan Gustman** - Loren M. Berry Professor of Economics at Dartmouth College
- **John Laitner** - Director at University of Michigan Retirement Research Center; Senior Research Scientist at Institute for Social Research; Professor of Economics at University of Michigan
- **Ron Lee** - Edward G. and Nancy S. Jordan Family Professor Emeritus of Economics; Professor Emeritus of Demography; Professor of the Graduate School; the University of California Berkeley; Associate Director at Center for the Economics and Demography of Aging
- **Nicole Maestas** - Associate Professor of Health Care policy at Harvard Medical School; Associate Director of the National Bureau of Economic Research's Disability Research Center
- **Olivia Mitchell** - International Foundation of Employee Benefit Plans Professor and Professor of Insurance/Risk Management and Business Economics/Policy Wharton School of the University of Pennsylvania; Executive Director, Pension Research Council; Director at Boettner Center on Pensions and Retirement Research
- **Kathleen Romig** - Senior Policy Analyst at Center on Budget and Policy Priorities
- **David Stapleton** - Director at Center for Studying Disability Policy, Mathematica Policy Research (part of the SSA funded Disability Research Consortium)
- **Eugene Steuerle** - Institute Fellow and Richard B. Fisher Chair at Urban Institute

Research reports

The Board turned its attention during 2018 to examining SSA's research and data analytic methodologies, including the agency's use of these methods for examining policies and improving internal process and administrative initiatives. Following the publication of recommendations for SSA's policy research agenda in November 2017, as part of its fact-finding process, the Board received a high-level briefing in September 2017 on a new deputy commissioner-level component within SSA, the Office of Analytics, Review, and Oversight, whose mission is to employ modern analytical methods to improve program administration. In October 2017, the Board heard from a member of the Commission on Evidence-based Policymaking, Bruce Meyer, who described the Commission's recommendations to improve the accessibility of federal agency administrative data to facilitate the empirical evaluation of federal programs. A series of reports is expected beginning in the fall of 2019.

Board-sponsored technical panels

The Board has a long-standing commitment to examine underlying assumptions and data modeling undertaken by SSA and the Social Security Trustees as they project the financial status of the Social Security trust funds. During 2017 and 2018, one technical panel finished its work, and another began, each designed to inform the debate surrounding actuarial assumptions and methods.

Technical Panel on Labor Force Participation

In the spring of 2016, the Board commissioned a panel of five prominent labor economists to evaluate the assumptions and the methods about projections of the labor force size and rates of labor force participation, and to provide recommendations as to how those assumptions and methods could be improved. The panel was chaired by Robert A. Moffitt, Krieger-Eisenhower Professor of Economics at Johns Hopkins University. Fellow panel members included:

- **Gary Burtless** - John C. and Nancy D. Whitehead Senior Fellow at the Brookings Institution
- **Chinhui Juhn** - Henry Graham Professor of Economics at the University of Houston
- **Kathleen McGarry** - Professor of Economics at UCLA
- **Kevin M. Murphy** - George J. Stigler Distinguished Service Professor of Economics in the Department of Economics and Graduate School of Business, University of Chicago

The activities of the technical panel extended through the first half of 2017. In June 2017, the technical panel released its final report, *Technical Panel on Labor Force Participation: Final Report to the Social Security Advisory Board*. Panel Chair, Robert Moffitt, presented the panel's recommendations to the Board. The technical panel then discussed the findings with Board members, the Chief Actuary, staff members representing the trustees, congressional staff, and other interested stakeholders. The panel made eight recommendations, as follows:

Recommendation 1: SSA's Office of the Chief Actuary should invest additional effort into systematically exploring the capability of its labor force projection model to explain pre-recession historical trends. The Chief Actuary should explicitly consider which, if any, of the forces generating recent historical trends are likely to discontinue in the future.

Recommendation 2: SSA's Office of the Chief Actuary's labor force projection model should allow for differential trends in labor force participation, stratified by educational levels, with the assumption the forces underlying those trends will continue (at least over the medium term). Furthermore, consistent with Recommendation 1, the model should be modified to capture pre-recession trends by educational level.

Recommendation 3: SSA's Office of the Chief Actuary's model should greatly reduce the magnitude of its projected recovery from the Recession and should instead project that relatively little recovery will occur until the evidence suggests otherwise. The model should also construct the recovery to match the model's assumption of long-term values, based on pre-recession projected trends.

Recommendation 4: The model should incorporate data from recession years in estimating its effect of the business cycle on the labor force participation rate.

Recommendation 5: The model should modify its projection of completed educational distributions by using educational levels experienced by those younger than 35 and utilize data from more recent cohorts for projections.

Recommendation 6: Some attempts to validate the 40 percent life expectancy add factor should be conducted, either by comparison to regression-based estimates or by applying the add factor to historical cohorts to assess its plausibility, or both.

Recommendation 7: Incorporation of an effect of Disability Insurance application on labor force participation rates above and beyond benefit receipt itself into the model should improve the accuracy of its labor force participation rate projections.

Recommendation 8: The Office of the Chief Actuary should investigate and validate the usefulness of earnings reported data to the SSA to improve the accuracy and validity of its employment data.

In addition to the panel's final report, the Board posted the presentation slides used by Professor Moffitt to its website, along with the data and materials presented to the panel during their deliberations. The Board also posted the Office of the Chief Actuary's written response to the panel's report and the Chief Actuary's slide presentation at the June 2017 Board meeting.

Preparing for the 2019 Technical Panel on Assumptions and Methods

Throughout 2018, the Board worked to establish the 2019 Technical Panel on Assumptions and Methods. Every four years since 1999, the Board has convened an independent, expert panel consisting of actuaries, economists, and demographers to review and assess the assumptions and methods used in the projection of financial status of the Old-Age, Survivors and Disability Insurance trust funds published annually in the report of the Social Security Board of Trustees. The last full panel issued its report to the Board in 2015.

In early 2018, the Board identified candidates to chair the 2019 Technical Panel and in April, selected Robert M. Beuerlein, consulting actuary with RM Beuerlein Consulting, retired Senior Vice President and Chief Actuary of AIG Life and Retirement Companies and past president of the American Academy of Actuaries (2017) and the Society of Actuaries (2006).

Over the first half of 2018, the Board discussed potential topics for the panel to examine. Those discussions included the Chief Actuary of Social Security, SSA's Deputy Commissioner for Retirement and Disability Policy, staff from the Government Accountability Office, the Congressional Budget Office and SSA's Office of Inspector General. In July, the Board approved the panel's charter. The charter requires the panel to: 1) review, assess, and make recommendations for improving the key assumptions and methods used in the annually reported projection of Social Security finances, 2) review ways to improve the presentation of key concepts in the Trustees report to make them more accessible and informative to policymakers and the public, and 3) consult the Board, the Office of the Chief Actuary and the trustees on specific issues to which the panel should give additional attention. In October 2018, the Board announced nine others selected as panel members:

1. **Ron Gebhardtshauer** - a fellow of the Society of Actuaries, member of the American Academy of Actuaries, and professor emeritus in the Actuarial Science Program, Penn State University
2. **Alexander Gelber** - associate professor, Department of Economics and School of Global Policy and Strategy, University of California, San Diego
3. **Joshua Goldstein** - Chancellor's Professor of Demography, University of California, Berkeley
4. **Patricia L. (Tricia) Guinn** - interim chief risk officer, Willis Towers Watson; fellow of the Society of Actuaries; member of the American Academy of Actuaries; Chartered Enterprise Risk Analyst; and previously managing director, Risk and Financial Services, Towers Watson

5. **Kathleen Mullen** - senior economist, RAND Corporation; director, RAND Center for Disability Research; and associate director, RAND Economics, Sociology and Statistics Department
6. **Louise Sheiner** - Robert S. Kerr Senior Fellow in Economic Studies, Brookings Institution, and policy director, Hutchins Center on Fiscal and Monetary Policy
7. **Sita Nataraj Slavov** - professor of public policy and director of the Public Policy Ph.D. Program, Schar School of Policy and Government, George Mason University
8. **Kent Smetters** - Boettner Chair Professor, Wharton School, University of Pennsylvania, and Faculty Research Fellow, National Bureau of Economic Research
9. **Tom Terry** - Fellow of the Society of Actuaries, member of the American Academy of Actuaries, fellow of the Conference of Consulting Actuaries, Enrolled Actuary, past president of the American Academy of Actuaries (2014) and the International Actuarial Association (2017); and CEO of the Terry Group, a healthcare, insurance and retirement consulting firm

The panel's first public meeting was held in November 2018, with subsequent meetings taking place each month through June 2019. The panel expects to issue its final report by September 2019. Email requests for the panel's charter, members, meeting schedules, agendas, and presentations to ssab@ssab.gov

Preparing for the IT Systems Expert Panel

The Board unanimously agreed that reviewing and monitoring the progress of SSA's IT Systems Modernization Plan would be a top priority. SSA's five-year plan began in October 2017 with a projected completion date of October 2022 and a projected cost of \$677 million.

To better understand the complexities and challenges with massive organizational IT systems modernization, the Board staff conducted numerous informational interviews with experts during the summer and fall of 2018. Experts in information technology, financial management, business process management, and acquisitions were selected from across the public and private sectors, including those who served as federal Chief Information Officers, Chief Financial Officers, and SSA Senior Executive leadership. After their review of the themes and guidance obtained during the interviews, the Board decided to convene an independent expert panel to examine and evaluate the implementation of SSA's systems modernization plan and report findings to the Board. Panel selection is expected in the fourth quarter of fiscal year 2019. Panel deliberations will begin soon after, ending in fiscal year 2020.

Annual statement on the SSI program

Each year, the Board may include a statement in the appendix to the SSA *Annual Report of the Supplement Security Income Program*. Background and context are provided for topics chosen, including why the program operates as it does and areas for research and further study.

Also, The Board unanimously agreed that reviewing and monitoring the progress of SSA's Information Technology Systems Modernization Plan would be a top priority. SSA's five-year plan began in SSA October 2017 with a projected completion date of October 2022 and a projected cost of \$691 million.

2017: Work Incentives and Work Supports in the SSI Program

In June 2017, the Board's statement highlighted the strengths, weaknesses, and successes of work incentive efforts. In the statement, the Board recommended SSA consider the following:

- Adjustment of how (or even whether) benefits are reduced when earnings are present
- Targeting rehabilitation and work programs toward younger recipients;
- Shifting of program administration to the states
- Establishment of a work requirement (or similar) for some recipients

2018: Programs Serving Youth Receiving SSI

In July 2018, the Board's statement outlined the key research findings, demonstration projects and SSA policy initiatives designed to support young people as they transition from school into adulthood. It included discussions of the childhood program, age-18 redeterminations, and research about employment for young people with disabilities.

² SSA Office of the Inspector General, "Verifying the identities of individuals who file internet claims," A-14-18-50640, November 7, 2018: https://oig.ssa.gov/sites/default/files/audit/summary/pdf/A-14-18-50640_summary.pdf.

II. Outreach and field visits

Bread for the City

On March 21, 2017, Board Chair Aaron, Board Member Hildred, Staff Director Claire Green, and Board staff Fran Huber and Bethel Dejene met with Susanne Horn at Bread for the City, an organization that now serves as an organizational payee. Established in the 1970s initially as a medical care facility and a food pantry, Bread for the City has since expanded to provide other services, including pro bono legal and social services to the city's most vulnerable populations. Clients are referred to Bread for the City by other agencies. Horn described the agency's organizational structure and functions, processes and pitfalls, enrollment numbers, the referral process, pending applications and procedures for benefit suspension.

Student visit with Board staff

In September 2017, Board staff Anita Grant and Joel Feinleib met with students visiting from Fairport High School, Fairport NY. This meeting was held in relation to a school project focused on Social Security benefits and entitlement reform. The students were evaluating the solvency of the Social Security trust funds and emerging retirement trends.

Understanding SSA's budget process

On August 16, 2017 Board Members Hildred, Gokhale, and Aaron, along with Board staff, visited SSA Headquarters for an in-depth presentation on SSA's organization and budgetary allocations and spending. The Board met with Operations and Budget executives and staff to gain an understanding of SSA's budget process; in particular, how the agency uses data to assess its resource needs during the annual budget process, from budget formulation, through budget justification, and finally, to budget execution once funds have been provided and made available for agency operations. The Board's main interest is in how SSA makes budget decisions, such as how limited resources are allocated and managed among agency components, what kind of data SSA collects to support these decisions, and how these data are used to justify future budget requests. The Board offered suggestions to improve the framing of budget material to help restore public confidence in SSA's justification of its spending estimates.

2018 National Association of Disability Examiners - national training conference

In August 2018, Board Chair Hildred was a featured speaker at the National Association of Disability Examiners conference in Arlington, Virginia. Board Chair Hildred provided an overview of the history and mission of the Board and invited feedback from the conference attendees, asking them what they would change to better serve the public, and how well SSA communicates its priorities. Attendees offered insights and personal anecdotes about needed improvements, including improved communications between headquarters and state agencies.

National Council of Social Security Management Associations - annual meeting

In September 2018, Board Chair Hildred and Staff Director Claire Green traveled to Atlantic City, New Jersey, for Board Chair Hildred to address the National Council of Social Security Management Association's annual conference. After providing an overview of the Board's mission and work she engaged representatives from field offices across the country in a discussion about public service

and where improvements need to be made. Challenges expressed included: the need for increased automation, system delays, inadequate bandwidth, an antiquated telephone system, and added workloads with little explanation and no adjustments to productivity goals. While the frustration was palpable, so was the commitment to public service and to finding ways to make programs work better for everyone.

Visits to the field

Beginning in fiscal year 2018, Board members and staff visited SSA offices in their home communities, including seven field offices in five states: Pennsylvania, California, Maryland, Virginia, Montana; three hearings offices in two states and the district: California, Montana, Washington DC; one Office of Hearings Operations Regional Office in California; the National Hearings Center in Falls Church, Virginia; and two Disability Determination Services in Montana and Washington DC.

Meeting with Mathematica fellows

Board staff continued its tradition in 2017 and 2018 of meeting with summer fellows chosen by Mathematica Policy Research. Fellows' research topics included social insurance, disability, and health care.

Meeting with SSA executives in Baltimore

The first day of the Board's October 2017 meeting was held at SSA headquarters in Baltimore MD. The Board asked to meet with the Deputy Commissioners of Budget, Finance, and Management; Retirement and Disability Policy, Human Resources; and Operations. Each Deputy Commissioner explained the following in their presentation:

- The structure of their organization
- Role and responsibilities
- Key organizational processes
- Performance measures for which they are responsible and their progress
- Unique challenges and major concerns

Liaison to the Administrative Conference of the United States

The Board and the Administrative Conference of the United States (ACUS) have shared interests in finding ways to improve Social Security programs and advancing policy discussion. In 2018, ACUS invited Staff Director Claire Green to participate as a Liaison Representative. She was assigned to the Administration & Management Committee which is reviewing Electronic Case Management.

III. Visualizing social security data

The disability chartbook

Since 2001, the Board periodically published chartbooks containing data on the Disability Insurance and Supplemental Security Income programs. After the third edition was published in 2012, the Board began developing the chartbook as an online resource. Data is updated frequently and all website users can access and ability to download underlying data. In 2017, the Board introduced a major redesign of the chartbook, including interactive data visualizations permitting users the opportunity to explore a richer set of information in a more compact and readable format.

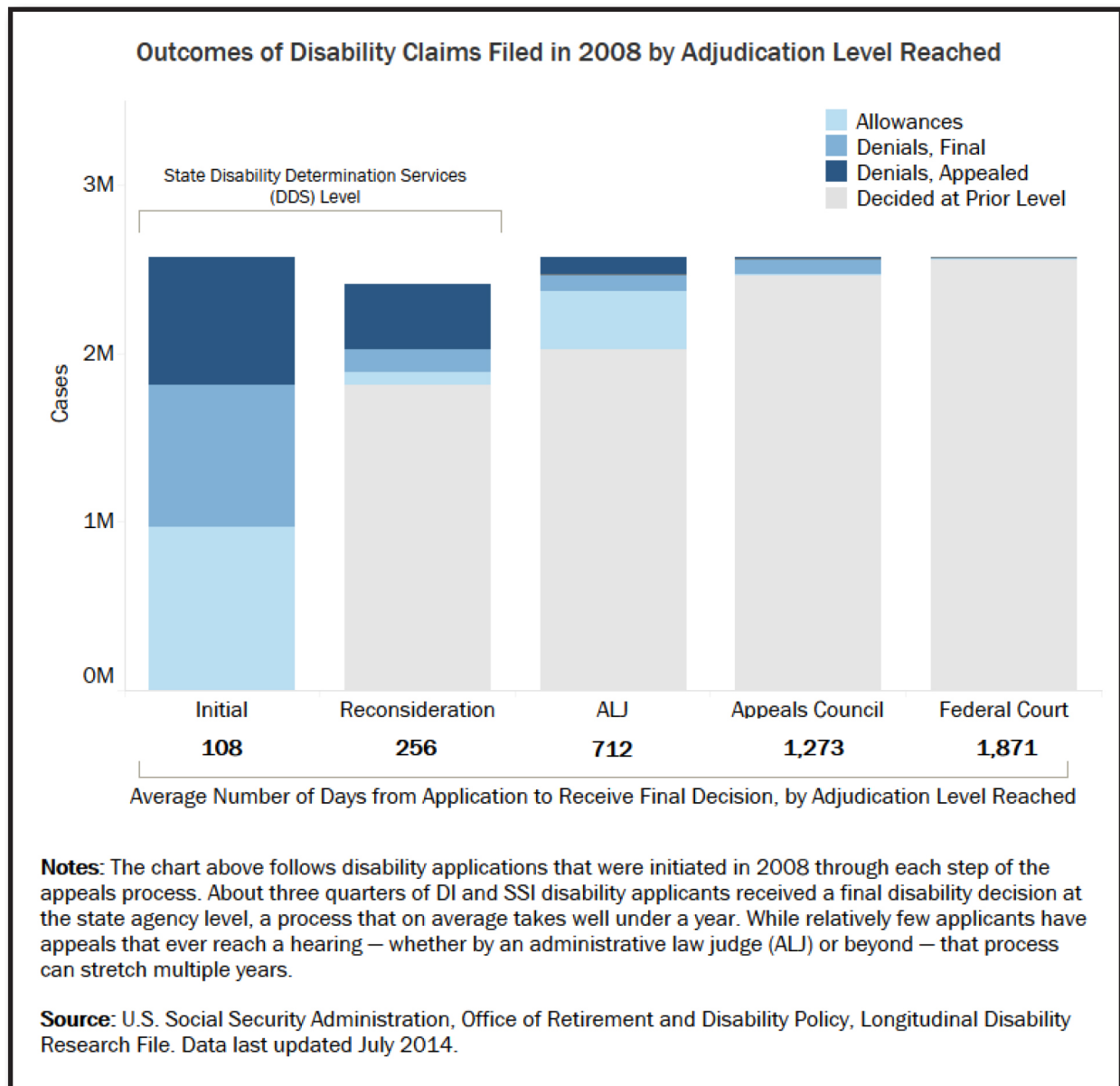
At present, the chartbook includes more than 70 charts organized into 11 chapters describing:

- Trends in applications
- Allowance rates
- Continuing disability reviews
- Terminations from the program
- Numbers and characteristics of beneficiaries
- Variation in state disability determinations
- Outcomes of the hearing and appeals process
- Processing time and cases brought to Federal court

Many charts now offer users the options to view data trends by program, time, or geographic unit. The Board continues to work with SSA to obtain the data needed for chartbook updates. Two examples are provided below.



Outcomes of Disability Claims Filed in 2008 by Adjudication Level Reached

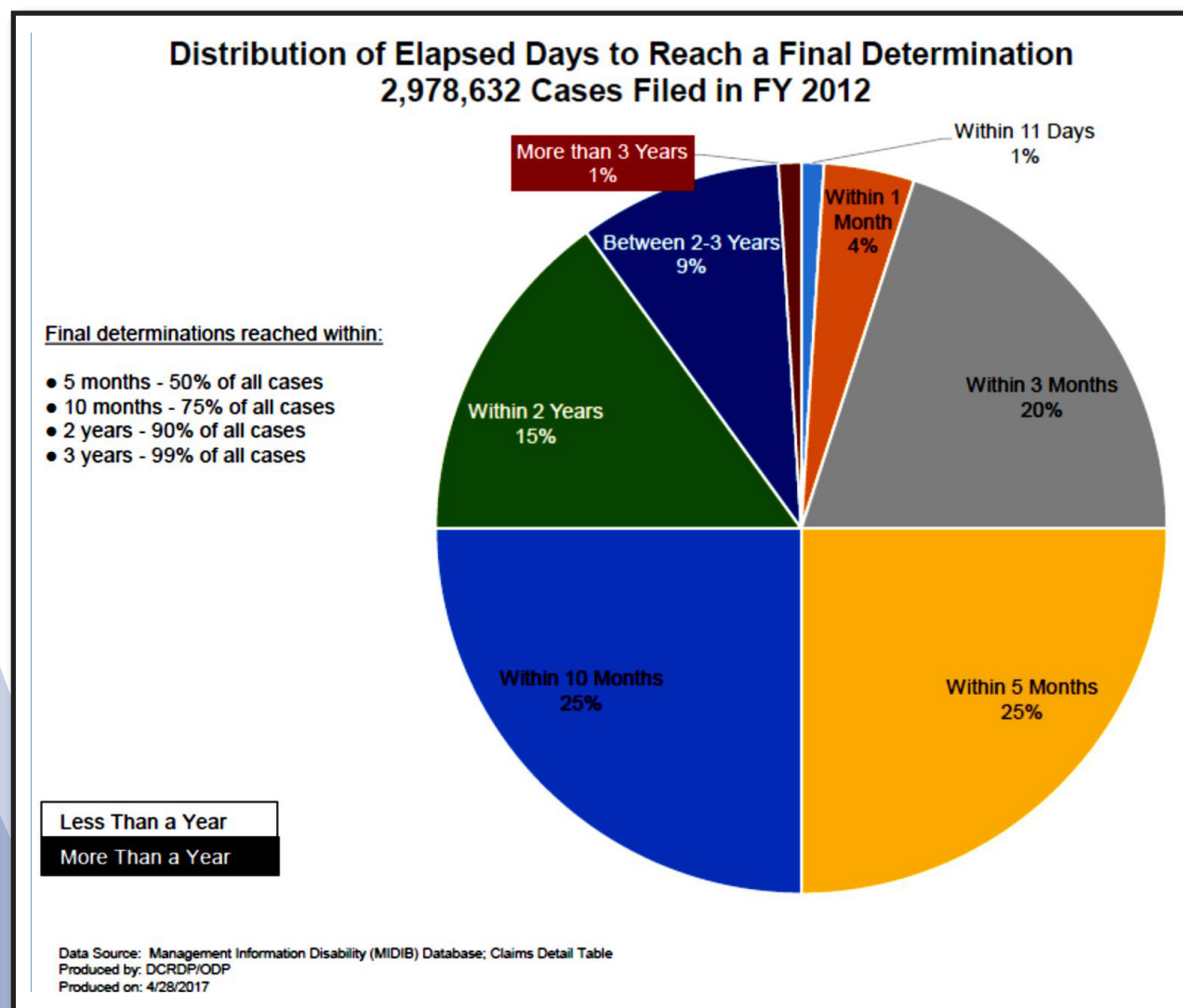


Series on processing disability claims

For several years the Board asked SSA to provide data on the average length of time required to process a disability claim, from the initial application through all of SSA's administrative processes. SSA provided information demonstrating that, while the wait time at the hearings level averaged around 600 days, the majority of claimants have their cases decided within five months of initial application.

As shown in the following chart on page 22, for claims filed in fiscal year 2010, a quarter of claimants received a final decision within 87 days; half of the claimants received a final decision within 143 days and three-fourths of claimants received a final decision within 287 days.

Distribution of Elapsed Days to Reach a Final Determination



Retirement chart collection

In April 2018, the Board introduced a set of chart collections using the same interactive visualization tools as the disability chartbook. The charts address key issues in the retirement program, including information on when people claim benefits, how demographic trends affect the program, and how the financial status of the program will affect future beneficiaries. Interesting interactive visualizations will continue to be provided at regular intervals to facilitate improved and increased public awareness, and understanding, of the social security system.

IV. Public Board meetings

The Board held 13 Board meetings from January 2017 through September 2018; five were two-day meetings and two included forums on the representative payee program. The Board heard from SSA leadership, experts and stakeholders from SSA and outside organizations, including other federal agencies and from the private sector during the year.

The following are presenters of the Board's public meetings held from January 2017 through September 2018. For a summary of the public meeting minutes, please go to the Board's website: www.ssab.gov.

January 23, 2017, Board meeting participants and public session presenters included:

- **Ed Doonan** - Chairman, Board of Directors for the National Association of Organizational Representative Payees, and Head of Government Affairs program, Benefits Management Corporation/Living in Familiar Environments
- **Bonnie Kind** - Associate Commissioner, Office of Budget, Finance, Quality and Management, SSA
- **Michelle King** - Deputy Associate Commissioner, Office of Budget, Finance, Quality and Management, SSA
- **Theresa Gruber** - Deputy Commissioner, Office of Disability Adjudication and Review, SSA
- **Gerald Ray** - Administrative Appeals Judge, Deputy Executive Director, Office of Appellate Operations, Office of Disability Adjudication and Review, SSA

February 23, 2017, Board meeting participants and public session presenters included:

- **Robert Moffitt** - Chair, Technical Panel on Labor Supply, Krieger-Eisenhower Professor of Economics, Johns Hopkins University
- **Ilona Dotterer** - National Treasury Employees Union, Senior Steward for Region 8 (Denver) Senior Attorney, Office of Disability Adjudication and Review, SSA
- **Christie Saunders** - National Treasury Employees Union, President, Senior Attorney, Office of Disability Adjudication and Review, SSA
- **Jason Fichtner** - Senior Research Fellow, Mercatus Center, George Mason University

March 27, 2017, Forum *Joining Forces to Improve the Representative Payee Program*

(Please see Forum description under Board Highlights)

April 28, 2017, Board meeting participants and public session presenters included:

- **Erik N. Jones** - Assistant Deputy Commissioner, Operations, SSA

SSA Representatives from the National Council of Social Security Management Associations:

- **Chris Detzler** - President (Vancouver, WA)
- **Val Fisher** - Vice President (New Brunswick, NJ)
- **Beth Williams** - Treasurer (Mt. Prospect, IL)
- **Becky Archer** - Executive Officer (Reno, NV)
- **Rick Warsinskey** - Immediate Past President (Cleveland Downtown, OH)
- **Peggy Murphy** - Executive Committee Member (Great Falls, MT)
- **Vanessa Martin** - Executive Committee Member (Martinsburg, WV)
- **Rachel Emmons** - Washington Representative

May 24, 2017, Board meeting participants and public session presenters included:

- **John Fisher** - Chief Relationship Officer, Money Matters International

June 30, 2017, Board meeting participants and public session presenters included:

- **Robert Moffitt** - Krieger-Eisenhower Professor of Economics, Johns Hopkins University; Chair of the Technical Panel on Labor Force Participation
- **Stephen C. Goss** - Chief Actuary, Office of the Chief Actuary, SSA
- **Bonnie Kind** - Associate Commissioner, Office of Budget, SSA
- **Patrick Perzan** - Deputy Associate Commissioner, Office of Budget, SSA
- **Kevin M. Murphy** - George J. Stigler Distinguished Service Professor of Economics, Department of Economics and Graduate School of Business, the University of Chicago (joined by phone)
- **Karen Glenn** - Deputy Chief Actuary for Long Range Estimates, Office of the Chief Actuary, SSA August 4, 2017 (see Research Agenda Roundtable Description under Board Highlights)

September 15, 2017, meeting participants and public session presenters included:

- **Chris Detzler** - President, National Council of Social Security Management Associations (Vancouver, WA)
- **Peggy Murphy** - Vice President, National Council of Social Security Management Associations (Great Falls, MT)
- **Gail Stallworth Stone** - Acting Inspector General, SSA
- **Rona Lawson** - Acting Assistant Inspector General for Audit, Office of the Inspector General, SSA
- **Kim Byrd** - Deputy Assistant Inspector General for Audit, Office of Inspector General, SSA
- **Walter E. Bayer** - Congressional and Intragovernmental Liaison, Office of Inspector General, SSA
- **Constance F. Citro** - Senior Scholar, and former Director, Committee on National Statistics
- **John Phillips** - Associate Commissioner, Office of Research, Evaluation and Statistics, SSA

October 18-19, 2017, meeting participants and public session presenters included:

Day One

Meeting held at SSA Headquarters in Baltimore, see general description under Board highlights)

Day Two

- **Bruce D. Meyer** - Member, Commission on Evidence-Based Policymaking McCormick Foundation Professor, the University of Chicago (on sabbatical), Visiting Scholar, American Enterprise Institute

December 11, 2017, Board meeting

(All day executive session)

February 9, 2018

The February meeting was canceled due to a lapse in federal funding.

April 18-19, 2018, Board meeting participants and public session presenters included:

- **Lisa Ekman** - Director of Government Affairs, National Organization of Social Security Claimants' Representatives
- **Stacy Cloyd** - Deputy Director of Government Affairs, National Organization of Social Security Claimants' Representatives
- **Elizabeth Curda** - Director, Education, Workforce, and Income Security Issues, U.S. Government Accountability Office
- **Rona Lawson** - Assistant Inspector General for Audit, Office of the Inspector General, SSA
- **Matt Wiener** - Executive Director, Administration Conference of the United States
- **Theresa Gruber** - Deputy Commissioner, Office of Hearing Operations, SSA
- **Christopher Dillon** - Acting Deputy Chief Administrative Law Judge, Office of Hearing Operations, SSA
- **David Powner** - Director of Information Technologies, Government Accountability Office
- **Jeffrey Brown** - Director of the Information Technology Audit Division, Office of Inspector General, SSA
- **Rajive Mathur** - Deputy Commissioner and Chief Information Officer, Systems, SSA
- **Sean Brune** - Chief Program Officer for Information Technology Modernization, Office of Commissioner, SSA
- **Bill Scherlis** - Professor of Computer Science, Director of the Software Research Institute, Carnegie Mellon University
- **Alan Balutis** - Senior Director, U.S. Public Sector, Cisco Systems, Inc.
- **Beth Rasch** - Staff Scientist and Chief of the Epidemiology and Biostatistics Section, Rehabilitation Medicine Department, National Institutes of Health

June 6-7, 2018, Board meeting participants and public session presenters included:

- **Stephen C. Goss** - Chief Actuary, Office of the Chief Actuary, SSA
- **Karen Glenn** - Deputy Chief Actuary, Office of the Chief Actuary, SSA
- **Nancy Berryhill** - Acting Commissioner, SSA
- **Michelle King** - Deputy Commissioner, Budget, Finance and Quality Management, SSA
- **Tiffany Flick** - Acting Associate Commissioner, Budget, Finance and Quality Management, SSA

- **Chad Posit** - Director of Realty Management, Office of Facilities and Logistics, SSA
- **Andrew Heller** - Deputy Assistant Commissioner, Office of Portfolio Management, General Services Administration
- **Chris Detzler** - President, National Council Social Security Management Associations
- **Peggy Murphy** - Vice President, National Council Social Security Management Associations
- **Becky Archer** - Executive Officer, National Council Social Security Management Associations
- **Rachel A. Emmons** - Washington Representative, National Council Social Security Management Associations
- **Jeremy Grant** - Managing Director of Technology Business Strategy, Venable, LLP

September 6-7, 2018, Board meeting participants and public session presenters included:

Day One: Forum *Moving Forward - Implementing Changes in the Representative Payee Program*
(Please see description and list of presenters in Board Highlights above)

- **Jennifer Flynn** - Senior Director, CrissCross Representative Payee Services, Money Management International, Sugar Land, TX
- **Jerry Hynes** - Vice President of Payee Services, Skils'kin, Spokane, WA
- **Kate Lang** - Senior Staff Attorney, Justice in Aging, Washington, DC
- **Christy Respress** - MSW, Executive Director, Pathways to Housing DC, Washington, DC
- **Nick Hart** - Director, Evidence-Based Policymaking Initiative, Bipartisan Policy Center, Washington, DC
- **James J. Klein** - San Francisco Audit Division Director, Office of Inspector General, SSA, San Francisco, CA
- **Peri Jude Radecic** - Chief Executive Officer, Disability Rights Pennsylvania, Harrisburg, PA
- **Pamela B. Teaster** - Professor and Director, Center for Gerontology, Virginia Tech, Blacksburg, VA

V. APPENDIX

Legislation establishing the Social Security Advisory Board

In 1994, when Congress passed Public Law 103-296 establishing the Social Security Administration as an independent agency, it also created an independent, bipartisan Advisory Board to advise the President, the Congress, and the Commissioner of Social Security on matters related to the Social Security and SSI programs. Under this legislation, appointments to the Board are made by the President, the Speaker of the House of Representatives, and the President pro tempore of the Senate.

The authorizing legislation lists the specific functions of the Board, including:

1. Analyzing the Nation's retirement and disability systems and making recommendations with respect to how the old-age, survivors, and disability insurance program and the supplemental security income program, supported by other public and private systems, can most effectively assure economic security;
2. Studying and making recommendations relating to the coordination of programs that provide health security with programs described in paragraph (1);
3. Making recommendations to the President and to the Congress with respect to policies that will ensure the solvency of the old-age, survivors, and disability insurance program, both in the short-term and the long-term;
4. Making recommendations with respect to the quality of service that the Administration provides to the public;
5. Making recommendations with respect to policies and regulations regarding the old-age, survivors, and disability insurance program and the supplemental security income program;
6. Increasing public understanding of the social security system;
7. Making recommendations with respect to a long-range research program and evaluation plan for the Administration;
8. Reviewing and assessing any major studies of social security as may come to the attention of the Board; and
9. Making recommendations with respect to such other matters as the Board determines to be appropriate.

2017-2018 Social Security Advisory Board Members

Advisory Board members are chosen on the basis of their integrity, impartiality, and good judgment, and are, by reason of their education, experience, and attainments, exceptionally qualified to perform the duties of members of the Board (42 U.S.C. 903 (c) (2)). Board members are appointed to staggered six-year terms, made up as follows: three appointed by the President (no more than two from the same political party); and two each (no more than one from the same political party) by the Speaker of the House (in consultation with the Chair and the Ranking Member of the Committee on Ways and Means) and by the President pro tempore of the Senate (in consultation with the Chair and Ranking Member of the Committee on Finance). Presidential appointments are subject to Senate confirmation. The President designates one member of the Board to serve as Chair for a four-year term, coincident with the term of the President, or until the designation of a successor.

2017 Board Members



Henry J. Aaron (D) 2020

Lanhee J. Chen (R) 2018



Jagadeesh Gokhale (R) 2021

Bernadette Franks-Ongoy (D) 2018



Kim Hildred, Chair (R) 2022

Barbara B. Kennelly (D) 2017

Note: All Board member terms expire September 30th of the year indicated.

2017-2018 Social Security Advisory Board Members

Kim Hildred, Chair (09/27/2016 - 09/30/2022)

Appointed by the Speaker of the House on 09/27/2016

Designated as Chair 06/29/2017

Kim Hildred currently serves as President of Hildred Consulting LLC. In early 2015, Ms. Hildred retired from the U.S House of Representatives after serving 17 years as Staff Director of the Committee on Ways and Means Subcommittee on Social Security. There she assisted

Committee members in the development and passage of legislation to strengthen Social Security retirement, survivors, and disability programs, as well as in the oversight of these programs. Ms. Hildred's efforts contributed to the Committee holding over 120 hearings and the signing of 10 bills into law, including the Ticket to Work and Work Incentives Improvement Act of 1999 (P.L.106-170), the Senior Citizens' Freedom to Work Act of 2000 (P.L.106-182), and the Social Security Protection Act of 2004 (P.L.108-203).

Ticket to Work and Work Incentives Improvement Act of 1999 (P.L.106-170), the Senior Citizens' Freedom to Work Act of 2000 (P.L.106-182), and the Social Security Protection Act of 2004 (P.L.108-203). Ms. Hildred's prior service includes three years deciding Social Security disability claims for the States of Kansas and Wisconsin, followed by ten years of increasingly responsible positions in managing Social Security disability programs in the Chicago and Philadelphia regions of the Social Security Administration. This included service as a federal disability hearing

officer and disability program administrator. Ms. Hildred has a Bachelor of Arts degree from Waynesburg University and a Master of Science in Education degree from Duquesne University.



2017-2018 Social Security Advisory Board Members

Henry J. Aaron

Appointed by the President as Chair, 09/30/2014 through 06/29/2017

Henry J. Aaron, Ph.D. is the Bruce and Virginia MacLaury Senior Fellow in the Brookings Institution Economic Studies Program, which he directed from 1990 through 1996. Dr. Aaron previously taught at the University of Maryland and Harvard University. He served as Assistant Secretary for Planning and Evaluation at the Department of Health, Education, and Welfare and chaired the 1979 Advisory Council on Social Security. Dr. Aaron is a member and vice-chair of the District of Columbia Health Benefits Exchange. He is also a member of the Institute of Medicine, the American Academy of Arts and Sciences, the advisory committee of the Stanford Institute for Economic Policy Research, and the Center on Budget and Policy Priorities. Dr. Aaron was a member of the Congressional Budget Office Panel of Economic Advisers and Panel of Health Advisers, the visiting committees of the Harvard Medical and Dental Schools and Department of Economics, and the Boards of directors of Abt Associates, Georgetown University, and the College Retirement Equity Fund. He was a founding member, Vice-President, and Board chair of the National Academy of Social Insurance. He has been Vice-President and member of the executive committee of the American Economic Association, was President of the Association of Public Policy and Management. Dr. Aaron received a B.A. from U.C.L.A in Political Science and Economics and holds an M.A. in Russian Regional Studies and a Ph.D. in economics from Harvard University.



2017-2018 Social Security Advisory Board Members

Lanhee J. Chen

Nominated by the President on September 30, 2013, and confirmed on September 8, 2014.

Lanhee J. Chen, Ph.D. is the David and Diane Steffy Research Fellow at the Hoover Institution; Director of Domestic Policy Studies and Lecturer in the Public Policy Program at Stanford University; Lecturer in Law at Stanford Law School; and an affiliate of the Freeman Spogli Institute for International Studies at Stanford University. Dr. Chen was the policy director for the Romney-Ryan 2012 Presidential campaign, as well as Governor Romney's chief policy adviser; a senior strategist on the campaign; and the person responsible for developing the campaign's domestic and foreign policy. In the George W. Bush administration, Dr. Chen was a senior official at the US Department of Health and Human Services. He also served as Domestic Policy Director of Governor Romney's first campaign for President and as a Health Policy Adviser on President George W. Bush's reelection campaign. Dr. Chen was also an associate attorney at the international law firm of Gibson, Dunn & Crutcher LLP. Dr. Chen currently serves on the Board of Trustees of the Junior Statesmen Foundation and the Advisory Board of the Partnership for the Future of Medicare. He earned his Ph.D. and A.M. in political science from Harvard University, his J.D. cum laude from Harvard Law School, and his A.B. magna cum laude in government from Harvard College.



2017-2018 Social Security Advisory Board Members

Barbara B. Kennelly

Appointed by the Speaker of the House on January 18, 2006. Reappointed March 1, 2012 (second term)

Barbara B. Kennelly is President of Barbara Kennelly Associates and is a Distinguished Professor at Trinity University. She served as President of the National Committee to Preserve Social Security and Medicare from 2002-2011. Congresswoman Kennelly served 17 years in the United States House of Representatives, representing the First District of Connecticut. During her Congressional career, Congresswoman Kennelly was the first woman elected to serve as the vice chair of the House Democratic Caucus, the first woman to serve on the House Committee on Intelligence, the first woman to serve as chief majority whip, and the third woman in history to serve on the 200-year-old Ways and Means Committee. During the 105th Congress, she was the ranking member of the Subcommittee on Social Security. Prior to her election to Congress, she was the Secretary of State of Connecticut. After serving in Congress, Congresswoman Kennelly was appointed to the position of counselor to the commissioner at SSA. As a counselor, Congresswoman Kennelly worked closely with Commissioner Kenneth S. Apfel and members of Congress to inform and educate the American people on the choices they face to ensure the solvency of Social Security. She served on the policy committee for the 2005 White House Conference on Aging. Congresswoman Kennelly received a B.A. in economics from Trinity College, Washington, D.C. She earned a certificate from the Harvard Business School on completion of the Harvard-Radcliffe program in business administration and a master's degree in government from Trinity College, Hartford. The first term of office: January 2006 to September 2011. Her second term of office January 5, 2011, to September 30, 2018.



2017-2018 Social Security Advisory Board Members

Jagadeesh Gokhale

Appointed by the President pro tempore of the Senate on November 19, 2009. Reappointed October 5, 2015 (Second term).

Appointed by the President pro tempore of the Senate on November 19, 2009 (first term); Reappointed October 5, 2015 (Second term). Jagadeesh Gokhale, Ph.D. is the Director of Special Projects at Penn Wharton Public Policy Initiative (Penn Wharton PPI). Prior to joining PPI, Dr. Gokhale was a senior fellow at the Cato Institute. Earlier he worked at the American Enterprise Institute as a visiting scholar (2003), the U.S. Treasury Department as a consultant (2002), and the Federal Reserve Bank of Cleveland as a senior economic advisor (1990-2003).

An economist by training, his main research fields are macro and public economics with a special focus on the effects of fiscal policy on future generations. In 2008, he served as a member of the Task Force on Sustainability Issues for the Federal Accounting Standards Advisory Board. Dr. Gokhale has written extensively on policy issues including Social Security and Medicare reform, national saving, private insurance, financial planning, wealth inequality, generational accounting, and public intergenerational transfers and he has testified several times before Congress on these topics. He published several papers in the American Economic Review, Journal of Economic Perspectives, Quarterly Journal of Economics, Review of Economics and Statistics and in publications of the National Bureau of Economic Research and the Cleveland Federal Reserve; in the US Budget report's Analytical Perspectives. He also

published in newspapers and online media such as the Wall Street Journal, The Financial Times, the Washington Post, American Spectator, and Forbes. Dr. Gokhale is a co-author of Fiscal and Generational Imbalances that revealed the US fiscal imbalance to be in the tens of trillions of dollars. In 2010 he published Social Security: A Fresh Look at Policy Alternatives which constructs a different method for determining the solvency of the Social Security trust funds. The first term of office: November 2009 to September 2015.



2017-2018 Social Security Advisory Board Members

Bernadette Franks-Ongoy

Appointed by the President pro tempore of the Senate on January 24, 2013.

Appointed by the President pro tempore of the Senate on January 24, 2013. Bernadette Franks-Ongoy is the Executive Director for Disability Rights Montana, an organization that protects and advocates for the human, legal, and civil rights of Montanans with disabilities. She manages and oversees the day-to-day activities of Disability Rights Montana and sets the tone to ensure that the organization's mission to advance dignity, equality, and self-determination is being accomplished. Ms. Franks-Ongoy says, "I was raised by a mother with a disability and a father who did not realize he was a feminist." She lived in an accessible house before the Americans with Disability Act was law. Her mother's wheelchair could access every room. "After all, mom needed to have access to my brothers and sisters rooms with her wheelchair." Ms. Franks-Ongoy is the youngest of eight siblings, including a brother with a mental illness. Ms. Franks-Ongoy grew up in the sugar plantation town of Waialua, Hawaii. With the support of Job Corp, Social Security, and other financial aid, she attended and graduated from Chaminade University with a Bachelor of Science Degree in Criminal Justice and a Bachelor of Arts degree in Sociology. She graduated from the University of San Diego, School of Law in 1983. Her past legal experience includes service as: law clerk, First Judicial Circuit Court in Hawaii, founding executive director of the Hawaii Bar Foundation, deputy corporation counsel, City, and County of Honolulu, and attorney and director of programs for the protection and advocacy system in Hawaii. She is licensed to practice law in Hawaii and with the United States Court of Appeals for the Ninth Circuit. Ms. Franks-Ongoy has served as President of the National Disability Rights Network and most recently was a member of Montana's Equal Justice Task Force.



Barbara B. Kennelly's term ends

On September 30th, 2017, the term of long-time Board member, Barbara B. Kennelly, came to an end. Congresswoman Kennelly, who was first appointed to serve on the Board by the House of Representatives in January 2006, succeeded former Congresswoman Martha Keys. She served in this term through September 2011. Congresswoman Kennelly was then reappointed by the House of Representatives in September 2012 and served as acting chair of the Board twice—once from October 2009 to September 2011 -- and again from October 2012 to September 2014. During her ten years of service on the Board, Congresswoman Kennelly remained a staunch advocate for protecting the nation's social insurance programs. A strong supporter of persons with disabilities, and a proponent of improving the Social Security disability adjudication and review processes to ensure those who apply for program benefits—or have their cases reviewed for continuance—are served as efficiently, effectively, and humanely as possible. Congresswoman Kennelly was also a strong advocate for modernizing SSA's information technology infrastructure to improve customer service while also maintaining and supporting excellence in the agency's traditional, face-to-face service channels.

2018 Board Members



Henry J. Aaron (D) 2020

Lanhee J. Chen (R) 2018



Jagadeesh Gokhale (R) 2021

Bernadette Franks-Ongoy (D) 2018



Kim Hildred, Chair (R) 2022

Nancy J. Altman (D) 2017

2018 Social Security Advisory Board Members

Nancy J. Altman joins the Board

On October 1, 2017, Nancy J. Altman was appointed to the Board for a six-year term to end on September 30, 2023, by the Speaker of the House of Representatives. Ms. Altman has forty years of experience in Social Security and private pension work. She is currently the President of Social Security Works and the Chair of the Strengthen Social Security Coalition. She is the author of *The Battle for Social Security: From FDR's Vision to Bush's Gamble* (John Wiley & Sons, 2005), *The Truth About Social Security: The Founders' Words Refute Revisionist History*,



Bernie Franks-Ongoy and Lanhee Chen complete their Board terms

On September 30, 2018, the terms of Board members Lanhee Chen and Bernadette Franks-Ongoy ended. Ms. Franks-Ongoy was nominated by the Senate and has served as a Board member from January 2013. Dr. Chen was nominated by President Obama on September 30, 2013, and served on the Board since confirmation in September 2014.

Ms. Franks-Ongoy was instrumental in the Board's research and work in disability benefits. She focused on representative payee projects and was the co-lead of the March 2017 Board forum, *Joining Forces to Improve the Representative Payee Program*, hosted by the Board. She also assisted in 2018 *Moving Forward - Implementing Changes in the Representative Payee Program* forum as one of the moderators and on reviewing SSA's telework policy.

For his part, Dr. Chen brought a wealth of knowledge on Medicare and Medicaid programs to the Board. He wrote a joint op-ed for *Politico* with then-Board Chair Henry Aaron, addressing Office of Personnel Management hiring deficiencies for administrative law judges, a key bipartisan issue for the Board. He conceived the idea of a Board retirement chartbook as a platform for a retirement data visualization and assisted in its creation on the Board's website. Together with Board staff, these charts were released each week during Retirement month and highlighted different issues related to retirement policy as a public education tool.

2018 Social Security Advisory Board Members

Bob Joondeph, JD was sworn in to begin his six-year term on the Social Security Advisory Board ending September 30, 2024, following his appointment by the President pro tempore of the Senate.

Joondeph served as the executive director of Disability Rights Oregon (DRO) for over 30 years. DRO is the Protection and Advocacy office for Oregon, promoting and defending the legal and civil rights of Oregonians with disabilities through legal-based advocacy. Joondeph came to Oregon as a VISTA volunteer attorney in 1976. Throughout his career, Joondeph has represented individuals with disabilities in state and federal courts, agencies and legislatures. He has served as a member of numerous state policy groups in Oregon including the Health Evidence Review Commission, Health Services Commission, Health Fund Board, Mental Health Planning and Management Advisory Council, State Rehabilitation Commission, Governor's Task Force on Brain Injury and the Council on Developmental Disabilities. He is the recipient of the Oregon State Bar Public Service Award, Oregon Disabilities Commission Advocate of the Year Award, Brain Injury Alliance of Oregon Advocacy Award, and the Oregon Civil Rights Leadership Award. Joondeph is a graduate of Case Western Reserve Law School and Brown University.

Joondeph assumes the post from Bernadette Franks-Ongoy, executive director of Disability Rights Montana, who served the Board from January 2013 through September 2018.



2017-2018 Board Staff

Management

Claire Green, Staff Director
Diane Brandt, Research Director

Senior Advisors

Pamela Crawford
Joel Feinlieb
Anita Grant
Jenn Rigger

Policy Attorney

Sterling Laudon*

Lead Policy Analyst

Conway Reinders

Policy Analysts

Matthew Comey*
Emma Tatem
James Owens

Administrative Assistant

Matthew Graves*

Management Analysts

Bethel Dejene
Caitlyn Tateishi*
Sarah Weaver*

Interns and Fellows

William Dede, Fellow, National Academy of Social Insurance*
Kiyana Grimes, Research Intern*
Dylan Hughes, Communication Intern*
Korey Johnson, Legal Intern*
Anna Memoli, Research Intern*
Meredith Yinger, Fellow, National Academy of Social Insurance*

Detailees from SSA

Fran Huber*
Joyce Nicholas*
Hilary Waldron*

*Designates those no longer working for the Board



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