

# Social Security Advisory Board Annual Report Fiscal Year 2019

March 2020

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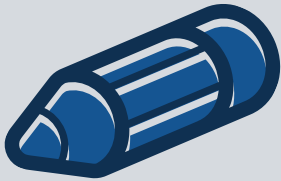
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# SSAB\* in Numbers

**FY 2019**

**5**  
publications



**700+**

**14,804**  
unique website views

from government agencies, including



**80+**

Congressional office views

**76**  
MINT Forum attendees

**47,375**  
web pages viewed

**680+**  
Twitter followers

**209**  
views  
DMF report

**12**  
days of Board meetings



**150,700**  
impressions



**2,071**  
views  
TPAM report



**775**  
views  
Disability Chartbook

\*including independent panels and researchers

met with  
**128**  
experts



**8** Field Offices visited

## **List of Acronyms and Definitions**

Board – Social Security Advisory Board

DMF – Death Master File

FY – Fiscal Year

Impressions – the number of times a Tweet shows up in someone's Timeline

IT – Information Technology

MINT – Modeling Income in the Near Term

Payee – Representative Payee

SSA – Social Security Administration

SSI – Supplemental Security Income

TPAM – Technical Panel on Assumptions and Methods

## Message from the Chair

The bipartisan Social Security Advisory Board's ("Board") mission is to provide the President, Congress, and the Commissioner of Social Security, advice and guidance with respect to how the Social Security and Supplemental Security Income (SSI) programs, supported by other public and private programs, can most effectively assure economic security. This Annual Report summarizes the Board's work during fiscal year (FY) 2019 first highlighting the Board's accomplishments, and then providing more detailed information.

## Highlights

### **The Board Continues its Work on Social Security's Representative Payees**

In FY 2019, the Board continued its commitment to researching Social Security's administration of representative payees (payees), including posting key themes from the Board's September 2018 forum; providing assistance to an independent research team commissioned to review the payee selection process; and, submitting Federal Register comments on Social Security's proposed payee selection and replacement policies.

### **The Board Publishes Report on the Death Master File**

In June 2019, the Board published a report outlining Social Security's often confusing and complicated death information collection, reporting, and dissemination process. Among its recommendations, the Board suggested that Congress shift the responsibility of collecting and sharing death information from Social Security to the Department of Treasury, which manages the federal government's Do Not Pay portal.

### **The Board Submits its Annual Statement on the Supplemental Security Income Program**

In its statement published in Social Security's FY 2019 annual SSI report, the Board addressed the complexities of dedicated accounts that are required when children receive lump-sum payments above a certain threshold. The majority of Board members recommended the elimination of dedicated accounts, which was also proposed in the Presidents 2020 Budget, but one Board member provided a supplemental statement advising Social Security to conduct research on the nature and reduction of this administrative burden.

### **The Board Hosts a Forum on Microsimulation Models**

In response to Social Security's request to examine the agency's Modeling Income in the Near Term (MINT) model, on May 30, 2019, the Board held a forum "Informing Policy: A Review of Social Security's MINT Microsimulation Model." The forum assembled MINT users and microsimulation experts to discuss challenges and opportunities facing the model and recommendations for its future development. The forum was the Board's first live webcast and has over 450 views on YouTube.

### **The Board Receives Two Congressional Requests**

In FY 2019, the Board received two written Congressional requests; one asking the Board to examine the impact of office closings on service to the public. The other asked the Board to review Social Security's decision to reinstate the Reconsideration step in the prototype offices where the reconsideration step had been eliminated, and additionally recommend improvements to the disability determination process at the initial and reconsideration levels. Extensive research is underway regarding both requests.

## ***The Board Commissioned Work***

### **Study to Document and Evaluate the Selection of Representative Payees**

As noted above, the Board funded an independent study documenting how employees at Social Security select payees for adult beneficiaries, and to evaluate whether those practices are sufficient. Results are expected in the spring of 2020.

### **Technical Panel on Assumptions and Methods**

In FY 2018, the Board commissioned an independent, expert panel to review the assumptions and the methods used to integrate those assumptions for projecting the future financial status of the Old-Age, Survivors, and Disability Insurance trust funds. The panel held eight public meetings throughout the year and released its final report in September 2019.

### **Information Technology Systems Expert Panel**

In August 2019, the Board appointed an independent, expert panel to review Social Security's efforts to modernize its information technology (IT) systems,

which are essential to delivering effective service to the public and keeping information protected.

To better define administrative supports and responsibilities between the Board and Social Security, the Board is exploring new approaches to meet its resource and infrastructure needs. This is especially important given the escalating complexity and budgetary implications of federal system security directives. Throughout FY 2019, the Board continued to work with the Congress, the Office of Management and Budget, and Social Security to identify solutions to these challenges. We sincerely thank the Commissioner of Social Security, Andrew Saul, Social Security employees, Congressional staff, and the many stakeholders and experts who provided their valuable expertise and insights in support of the Board's efforts. We also recognize and appreciate all our staff has done to help us achieve our mission.

Kim Hildred, Chair

A handwritten signature in blue ink that reads "Kim Hildred". The signature is written in a cursive, flowing style.

## Fiscal Year 2019 Accomplishments

### Representative Payee Work

Continuing its history of examining and recommending improvements to Social Security's payee work, the Board released a June 2019 brief entitled *Recent Developments in the Social Security Administration's Representative Payee Program*. The brief highlights the April 2018 legislation, *Strengthening Protections for Social Security Beneficiaries Act of 2018*, as well as major themes addressed at the Board's September 2018 policy forum and in its January 2019 public comment in the Federal Register. The brief also reports on Social Security's use of evidence to inform policy changes, continued Board concerns including the implementation of the new payee monitoring process, and communication between Social Security leadership and the broader public. The Board funded a collaborative study with researchers at Virginia Tech and the American Bar Association on the selection of payees (see p.10). Results of that study will be presented to the Board in FY 2020.

### Death Master File

From 2011 through 2017, Social Security on average incorrectly recorded over 9,000 living people as deceased, and then shared personal information protected under the Privacy Act with other federal agencies, including the Department of Commerce which then shares the information with certified users, such as banks and credit bureaus. The consequences for affected individuals can be severe, including bank account closure, denial of credit or employment and other economic hardships. In FY 2019, the Board released its report, *Social Security and the Death Master File*, in which the Board examined Social Security's process for collecting and disseminating death data and concluded that Social Security should no longer be responsible for death data collection and dissemination on behalf of the entire federal government. The Board recommended these death data functions be moved to the Department of the Treasury's Do Not Pay portal, a government-wide tool for improper payment prevention. Shifting death data collection and dissemination away from Social Security would require a significant implementation effort. For this reason, the Board also recommended an incremental step – a statutory requirement that Social Security share the full Death Master File, including state death data, with the Do Not Pay portal.



Following publication of this report, the Board was contacted by the Department of Treasury, congressional staff and others who wanted to learn more about the Board's report. In FY 2020, Congress passed, and the President signed legislation that requires Social Security and the Office of Management and Budget to study recommendations similar to those contained in the Board's report along with other possible death data improvements. Moreover, the 2021 Budget of the United States recommended shifting death data information from Social Security.

### **Supplemental Security Income Statement on Dedicated Accounts**

Adding to the Board's prior work on children receiving SSI, the Board submitted a statement regarding dedicated accounts for inclusion in Social Security's 2019 annual statement on the SSI Program. Dedicated accounts are separate accounts required for holding lump-sum past-due payments owed to children receiving SSI. The statement describes dedicated accounts, their provisions, and the implications of those provisions for children with disabilities in low-income families, including the complexities related to understanding, managing, and monitoring the accounts for payees and Social Security. The accounts are difficult to administer and represent another workload for both the payee and the agency.

Elimination of dedicated accounts was included as a legislative proposal in Social Security FY 2020, 2019, and 2017 budget justifications. In recent years, the *Budget of the United States* has also supported the elimination of dedicated accounts.

### **Policy Forum: Modeling in the Near-Term**

At the request of Social Security, the Board organized and hosted the policy forum "Informing Policy: A Review of Social Security's MINT Microsimulation Model." MINT helps policymakers understand the effects of changes to benefits and payroll taxes. The microsimulation model is built from Social Security's administrative records matched to the Survey of Income and Program Participation. It projects future retirement income, marital trends, Social Security benefits, income, and poverty, as well as the effects of policy changes on these issues. The event brought together MINT users and microsimulation experts to discuss challenges and opportunities facing MINT and other such models, and provided recommendations on MINT's future development. The Board streamed this event in its first live webcast. Available on YouTube, the webcast has more than 450 views. A transcript of the forum is also available on the Board's website.

## Congressional Requests

### Service Delivery

The Board received a Congressional request to examine the impact of Social Security's decision to close field offices on the quality and accessibility of service that Social Security provides the public, especially the most vulnerable. In a series of deliverables, the Board will examine field office closures, performance measures, and disability application costs, among other issues. An initial release is planned in FY 2020.

### Reconsideration

Throughout FY 2019, Social Security began to reinstate the reconsideration step in the disability adjudication process in the nine states (and part of Los Angeles County in California) that had eliminated reconsideration as part of a disability redesign prototype initiated 20 years ago. In response to Social Security's decision, the Chairman and Ranking Member of the House Committee on Ways and Means Subcommittee on Social Security sent a letter to the Board requesting a review of the decision to reinstate reconsideration in the prototype states, and to make recommendations on how the disability determination process at the initial and reconsideration levels can be improved.

In response to the letter, the Board has requested data and briefings from Social Security, has conducted a comprehensive literature review of process improvement and reconsideration research, and over the course of FY 2019 and continuing into FY 2020, the Board has held a series of four roundtable discussions addressing evidence collection and evaluation, access to needed expertise, claimants' experience with the application process, and how Social Security or others might test and evaluate ideas to improve the determination process. Reports on the results of this research will follow, with an initial release planned for FY 2020.

## Board Commissioned Work

### Technical Panel on Assumptions and Methods

The Board has a long-standing history of appointing expert technical panels to examine and make recommendation to improve the underlying actuarial assumptions and methods used by Social Security's Office of the Chief Actuary and

the Social Security Trustees to project the financial status of the Social Security trust funds. Policymakers and the public rely on these projections to understand the short and long-term financial soundness of Social Security's vital programs. In FY 2018, the Board commissioned its sixth quadrennial independent, expert panel of prominent actuaries, economists, and demographers. The panel released its final report in September of 2019.

This report reflected the culmination of nearly nine months of collaborative research, and included observations and recommendations regarding assumptions and methods used as well as the presentation of the information. The Panel was chaired by Robert M. Beuerlein, and included nine other members. More information about the panel members and their work, including the presentations made to the panel, is available on the Board's website.

### **Information Technology Systems Expert Panel**

At the end of FY 2019 the Board appointed an independent, expert panel to review the progress of Social Security's five-year, \$691 million-dollar IT Modernization Plan, and the Panel held its inaugural meeting. Throughout FY 2020 the panel will utilize their breadth of expertise and experience to examine progress and key initiatives of the plan, including how systems processes are developed, modified, and used by the agency. The review will encompass publicly available information to look at key areas of Social Security's systems and business processes related to the modernization initiative. Additional information about the IT Panel and its work can be found on the Board's website.

### **Independent Study to Document and Evaluate the Selection of Representative Payees**

The purpose of this project is to understand how Social Security selects payees for adults and whether those practices are sufficient to identify the best payee for the beneficiary. This independent study, conducted by Pamela Teaster (Virginia Tech), Laura Sands (Virginia Tech), and Erica Wood (American Bar Association), and funded by the Board, included visits to Social Security offices across the country (see Appendix II for a full list) where they interviewed managers and the field office decisionmakers on who needs a payee and who will be appointed as payee. The resulting paper will be completed in Spring of 2020.

## Fiscal Year 2019 Social Security Advisory Board Members

The Board is a bipartisan, independent federal agency established in 1994 to advise the President, the Congress, and the Commissioner of Social Security on matters of policy and administration of the Social Security and SSI programs. 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)). The Board has seven members, appointed to staggered six-year terms, with three appointed by the President, by and with the advice and consent of the Senate, two appointed by the President pro tempore of the Senate with the advice of the Chairman and the Ranking Minority Member of the Senate Committee on Finance, and two appointed by the Speaker of the House of Representatives, with the advice of the Chairman and the Ranking Minority Member of the House Committee on Ways and Means. The President designates one member of the Board to serve as Chair for a four-year term, coincident with the term of the President.

### Fiscal Year 2019 Board Members



Henry J. Aaron (D) 2020



Jagadeesh Gokhale (R) 2021

Robert Joondeph (D) 2024



Kim Hildred, Chair (R) 2022

Nancy J. Altman (D) 2023



**Kim Hildred** currently serves as President of Hildred Consulting, LLC, and Chair of the Social Security Advisory Board. In 2015, Ms. Hildred retired from the US House of Representatives after serving 17 years as Staff Director of the House Ways and Means Subcommittee on Social Security. There, Hildred assisted Committee Members in the development and passage of legislation to strengthen Social Security retirement, survivors, and disability programs, as well as oversight of these programs. Prior service includes three years deciding Social Security disability claims,

followed by ten years managing Social Security disability programs, including 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. Current term of office: September 2016 to September 2022.



**Dr. Henry J. Aaron** is the Bruce and Virginia Mac-Laury Chair and Senior Fellow in the Economic Studies Program at the Brookings Institution Brookings Institution, which he directed from 1990 through 1996. Dr. Aaron previously taught at the University of Maryland and at Harvard University. Aaron is Vice-Chair of the District of Columbia Health Benefits Exchange, a Member of the Institute of Medicine, the American Academy of Arts and Sciences, the Stanford Institute for Economic Policy Research Advisory Board, and the Board of Directors of the Center on Budget

and Policy Priorities. Dr. Aaron was a founding member, Vice-President, and Board Chair of the National Academy of Social Insurance. Aaron received a BA from UCLA in political science and economics, an MA in Russia regional studies, and a PhD in economics from Harvard University. Current term of office: September 2014 to September 2020.





**Dr. Jagadeesh Gokhale** is the Director of Special Projects at the Penn Wharton (“Wharton”) Budget Model. Prior to joining Wharton, Dr. Gokhale was a Senior Fellow at the Cato Institute. An economist by training, Gokhale’s main research fields are macro and public economics with a special focus on the effects of fiscal policy on future generations. 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; he has testified before Congress several times on these topics. In 2010 Gokhale published *Social Security: A Fresh Look at Policy Alternatives*, which constructs a different method for determining solvency of the Social Security trust funds. Dr. Gokhale is published in numerous professional journals, as well as newspapers such as the *Wall Street Journal*, *The Financial Times*, *The Washington Post*, and *Forbes*. Current term of office: October 2015 to September 2021.



**Nancy J. Altman, JD** has a forty-five-year background in Social Security and private pensions. Currently, Altman is President of Social Security Works, and Chair of the Strengthen Social Security Coalition. Ms. Altman was on the faculty of Harvard University’s Kennedy School of Government, and taught courses on private pensions and Social Security at the Harvard Law School. In 1982, Altman was Alan Greenspan’s Assistant in his position as Chairman of the bipartisan commission that developed the 1983 Social Security amendments. Altman is the author of *The Battle for*

*Social Security*, and *The Truth About Social Security*, as well as co-author of *Social Security Works! Why Social Security Isn’t Going Broke and How Expanding It Will Help Us All*. Ms. Altman has an AB from Harvard University and a JD from the University of Pennsylvania Law School. Current term of office: October 2017 to September 2023.



**Bob Joondeph, JD** served as the Executive Director of Disability Rights Oregon for over 30 years, promoting and defending the legal and civil rights of Oregonians with disabilities through legal-based advocacy. Mr. Joondeph has represented individuals with disabilities in state and federal courts, agencies and legislatures. Joondeph has served on the Oregon 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. Mr. Joondeph 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. Current term of office: October 2018 to September 2024.

## **FY 2019 Board Staff**

### **Management**

Claire Green, Staff Director

Diane Brandt, Research Director

### **Senior Advisors**

Pamela Crawford

Joel Feinleib

Anita Grant

Jenn Rigger

### **Management Analysts**

Bethel Dejene\*

Caitlyn Tateishi

### **Lead Policy Analysts**

Conway Reinders

Emma Tatem

### **Policy Analysts**

Mayana Bonapart

Lorena Hernandez Barcena

### **Interns**

Matthew Lewis

LaTroy Mayes

James Owens

Omar Shalabi

Cameron Zohary

\*promoted to Management Officer in May 2019.

For more information on who we are or what we do, please visit our website at

[www.SSAB.gov](http://www.SSAB.gov).



# Appendices

## I. Board Meetings

### November 1-2, 2018

Meeting was held in executive session at Social Security Administration (SSA) headquarters.

- Michelle King, Deputy Commissioner, Budget, Finance, and Management, SSA
- Mary L. Horne, Deputy Commissioner, Operations, SSA
- Theresa L. Gruber, Deputy Commissioner, Hearing Operations, SSA
- Nancy A. Berryhill, Acting Commissioner, SSA
- Chad Bungard, Deputy Commissioner, Analytics, Review, and Oversight, SSA
- Daryl X. Wise, Associate Commissioner, Analytics and Improvements, SSA
- Brad Flick, Associate Commissioner, Anti-Fraud Programs, SSA
- Gale Stallworth Stone, Acting Inspector General, SSA Office of the Inspector General (OIG)
- Stephen L Schaeffer, Chief of Staff, SSA OIG
- Rona M. Lawson, Assistant Inspector General for Audit, SSA OIG

### January 23-24, 2019

- Jack Smalligan, Senior Policy Fellow, Urban Institute
- Jen Burdick, Supervising Attorney, Community Legal Services of Philadelphia
- Sharon Bland-Brady, President, National Association of Disability Examiners; Disability Examiner, Michigan Disability Determination Services
- Jon Dubin, Associate Dean for Clinical Education; Professor of Law, Rutgers University
- Curt Decker, Executive Director, National Disability Rights Network

### March 27-28, 2019

Meeting was held in executive session.

- Gail Ennis, Inspector General, SSA OIG
- Manasi Deshpande, PhD, Assistant Professor of Economics, University of Chicago
- Phoebe Ball, Legislative Affairs Specialist, National Council on Disability

- Stacy Braverman Cloyd, Deputy Director of Government Affairs, National Organization of Social Security Claimants' Representatives
- Andrew Sperling, Director of Legislative and Policy Advocacy, National Alliance of Mental Illness
- Peggy Murphy, President, National Council of Social Security Management Associations; Manager, Great Falls, Montana Field Office
- Liz McLaren, President, National Council of Disability Determination Directors; Director, Iowa Disability Determination Services
- Michelle King, Deputy Commissioner, Budget, Finance, and Management, SSA
- Chad Poist, Acting Deputy Associate Commissioner, Budget, SSA
- Paul Hallinger, Senior Technical Advisor, Office of Budget, SSA
- Bea Disman, Chief of Staff, Office of the Commissioner, SSA
- Stephanie Hall, Deputy Chief of Staff, Office of the Commissioner, SSA
- Grace Kim, Acting Deputy Commissioner, Operations, SSA
- Jay Ortis, Counselor to the Commissioner, Office of the Commissioner, SSA
- Carmen Mallon, Chief of Staff, Office of Information and Budget, DOJ
- Matthew Hurd, Association Chief of the Appeals Staff, Office of Information Policy, DOJ

### May 30-31, 2019

On the first Board meeting day the Board held a Forum:

#### ***Informing Policy: A Review of Social Security's MINT Microsimulation Model***

For more information about the forum, and a link to the video recording please visit our website at [www.SSAB.gov](http://www.SSAB.gov)

- Carole Mason Spicer, Study Director, Committee on Functional Assessment for Adults with Disabilities, National Academies of Science (NAS)
- Paul Volberding, Professor of Medicine, University of California, San Francisco; Panel Chair, Committee on Functional Assessment for Adults with Disabilities, National Academies of Science
- Jack T. Dennerlein, Professor of Physical Therapy, Movement and Rehabilitation, Northwestern University; Panelist, Committee on Functional Assessment for Adults with Disabilities, NAS

- Allen W. Heinemann, Professor of Physical Medicine and Rehabilitation, Northwestern University; Panelist, Committee on Functional Assessment for Adults with Disabilities, NAS
- Judith Green McKenzie, Professor; Division Chief; Residency Program Director, Department of Emergency Medicine, University of Pennsylvania; Panelist, Committee on Functional Assessment for Adults with Disabilities, NAS

### July 25-26, 2019

- Grace Kim, Deputy Commissioner, Operations, SSA
- Erik Jones, Assistant Deputy Commissioner, Operations, SSA

### September 26-27, 2019

- Mark Warshawsky, Deputy Commissioner, Retirement and Disability Policy, SSA
- Stephen Goss, Chief Actuary, SSA
- B. Chad Bungard, Deputy Commissioner, Analytics, Review, and Oversight, SSA
- Pamela Herd, Professor, McCourt School of Public Policy, Georgetown University
- Donald P. Moynihan, McCourt Chair and Professor, McCourt School of Public Policy, Georgetown University
- Cheri Cannon, Partner Tully Rinckey, Attorneys & Counselors at Law

### Board Conference Calls

- Michael Astrue, former Commissioner, SSA
- David Powner, Director of Strategic Engagement and Partnerships, Mitre, Inc.
- Stephen Goss, Chief Actuary, SSA
- Pamela Teaster, Professor, Center for Gerontology, Virginia Tech
- Erica Wood, Attorney at Law, Commission on Law and Aging, American Bar Association

## II. Board Commissioned Work

### 2019 Technical Panel on Assumptions and Methods

- Robert M. Beuerlein, Chair; Consulting Actuary, RM Beuerlein Consulting
- Ron Gebhardtsbauer, Professor Emeritus, Actuarial Science Program, Penn State University
- Alexander Gelber, Associate Professor, Department of Economics and School of Global Policy and Strategy, University of California, San Diego
- Joshua Goldstein, Chancellor's Professor of Demography, University of California, Berkeley
- Patricia L. (Tricia) Guinn, Director, Reinsurance Group of America, Inc. and Assetmark Financial Holdings, Inc.
- Kathleen Mullen, Senior Economist, RAND Corporation; Director, RAND Center for Disability Research
- Louise Sheiner, Robert S. Kerr Senior Fellow in Economic Studies, Brookings Institution; Policy Director, Hutchins Center on Fiscal and Monetary Policy
- Sita Nataraj Slavov, Professor of Public Policy; Director, Public Policy PhD Program, Schar School of Policy and Government, George Mason University
- Kent Smetters, Boettner Chair Professor, Wharton School, University of Pennsylvania; Faculty Research Fellow, National Bureau of Economic Research
- Tom Terry, CEO, The Terry Group

For complete bios of our distinguished panelists and more information, please visit our website at [www.SSAB.gov](http://www.SSAB.gov).

### The Technical Panel on Assumptions and Methods Public Meetings:

#### *November 16, 2018*

- Dan Kowalski, Counselor to the Secretary, Department of the Treasury
- Randall Mariger, Senior Economist, Office of Economic Policy, Department of the Treasury
- Mark Warshawsky, Deputy Commissioner, Retirement and Disability Policy, SSA
- Steve Robinson, Senior Advisor, Retirement and Disability Policy, SSA
- Robert O'Quinn, Chief Economist, Department of Labor
- Chet Andrzejewski, Chief Actuary, Employee Benefits Security Administration, Department of Labor

- William Marton, Director of the Disability and Aging Policy Division, Department of the Health and Human Services
- Julie Topoleski, Chief, Long-Term Analysis Unit, Congressional Budget Office
- Stephen Goss, Chief Actuary, SSA
- Karen Glenn, Deputy Chief Actuary, Long-Range, SSA

### ***December 14, 2018***

#### **Executive Session:**

- Charles Blahous, past Public Trustee of the Social Security Trust Funds
- Robert Reischauer, past Public Trustee of the Social Security Trust Funds
- Jeff Wrase, Majority Deputy Staff Director and Chief Economist, US Senate Committee on Finance
- Tom Klouda, Senior Domestic Policy Advisor, Democratic Staff, US Senate Committee on Finance
- Kathryn Olson, Majority Staff Director, US House Ways and Means Subcommittee on Social Security
- Amy Shuart, Republican Staff Director, US House Ways and Means Subcommittee on Social Security

#### **Public session:**

- Gerard Anderson, Professor of Health Policy and Management and Professor of International Health, Johns Hopkins University Bloomberg School Public Health
- David Cutler, Harvard College Professor and Otto Eckstein Professor of Applied Economics, Harvard University
- Greig Woodring, retired CEO, Reinsurance Group of America
- Jeffrey Liebman, Malcolm Wiener Professor of Public Policy Kennedy School of Government, Harvard University
- Jeffery L. Schuh, Vice President and Actuary, US Group Reinsurance, Reinsurance Group of America
- Richard Leavitt, Senior Vice President Actuarial, Smith Group
- Stephen Goss, Chief Actuary, SSA
- Karen Glenn, Deputy Chief Actuary, Long-Range, Social Security Administration

### ***January 25, 2019***

- David Deming, Professor of Public Policy, Harvard Kennedy School; Professor of Education and Economics, Harvard Graduate School of Education

- Michael Chui, Partner, McKinsey and Company and McKinsey Global Institute
- Stephen Goss, Chief Actuary, SSA
- Karen Glenn, Deputy Chief Actuary, Long-Range, SSA

### ***February 15, 2019***

- Hans-Peter Kohler, Frederick J. Warren Professor of Demography and Professor of Sociology, University of Pennsylvania
- Alison Gemmill, Assistant Professor, Department of Family, Population and Preventive Medicine, Stoney Brook University
- Josh Goldstein, Technical Panel Member
- Wendy Edelberg, Associate Director for Economic Analysis, Congressional Budget Office
- Jeffrey Werling, Assistant Director for Macroeconomic Analysis, Congressional Budget Office
- Jagadeesh Gokhale, Director of Special Projects, Penn Wharton Budget Model
- Jonathan Schwabish, Senior Fellow in the Income and Benefits Policy Center, Urban Institute; Founder, PolicyViz
- Stephen Goss, Chief Actuary, SSA
- Karen Glenn, Deputy Chief Actuary, Long-Range, SSA

### ***March 29, 2019***

#### **Public session:**

- Doug Massey, Henry G. Bryant Professor of Sociology and Public Affairs, Princeton University
- Emilio Parrado, Dorothy Swaine Thomas Professor of Sociology; Chair of the Department of Sociology, University of Pennsylvania
- Daron Acemoglu, Elizabeth and James Killian Professor of Economics, Massachusetts Institute of Technology
- David Wessel, Senior Fellow Economic Studies; Director, the Hutchins Center on Fiscal and Monetary Policy, Brookings Institution
- Ricardo Alonso Zaldivar, Associated Press
- Alexia Fernandez Campbell, Vox Media
- James Stock, Harold Hitchings Burbank Professor of Political Economy, Faculty of Arts and Sciences, Harvard University
- Stephen Goss, Chief Actuary, SSA

- Karen Glenn, Deputy Chief Actuary, Long-Range, SSA

#### ***April 12, 2019***

- Gary Burtless, Senior Fellow in Economic Studies, Brookings Institution; Member, 2017 Labor Force Technical Panel, SSAB
- Louise Sheiner, Technical Panel Member
- Stephen Goss, Chief Actuary, SSA
- Karen Glenn, Deputy Chief Actuary, Long-Range, SSA

#### ***May 10, 2019***

- Martha Coven, Coven Consulting; Lecturer and John L. Weinberg/Goldman Sachs & Company Visiting Professor, Woodrow Wilson School, Princeton University
- Tony Fratto, Managing Partner, Hamilton Place Strategies
- Tom Terry, Technical Panel Member
- Kathleen Mullen, Technical Panel Member
- Lousie Sheiner, Technical Panel Member
- Stephen Goss, Chief Actuary, SSA
- Karen Glenn, Deputy Chief Actuary, Long-Range, SSA

To view the 2019 Report and more information, please visit our website at [www.SSAB.gov](http://www.SSAB.gov).

#### **Social Security Information Technology Expert Panel**

- Alan Balutis, Panel Chair; Senior Director, North American Public Sector Cisco Systems' Business Solutions Group
- Dan Chenok, Executive Director, IBM Center for the Business of Government; Chair, Cybersecurity Subcommittee, Homeland Security
- Nani A. Coloretti, Senior VP for Financial and Business Strategy, Urban Institute; Former Deputy Secretary, Department of Housing and Urban Development
- Renato A DiPentima, Former Deputy Commissioner and CIO, Social Security Administration
- Martha Dorris, Director, World Information Technology and Services Alliance Board; former Deputy Associate Administrator, Office of Citizen Services and Innovative Technologies, GSA

- William D. Eggers, Executive Director, Deloitte's Center for Government Insights
- Mark Alan Forman, VP Digital Government, Unisys Federal Systems; formerly, US Senate Committee on Governmental Affairs
- Greg Giddens, Partner, Potomac Ridge Consulting; Chief Acquisition Officer, Partnership for Public Service
- Dave Mc Clure, Leader of Transformational IT Initiatives, Accenture Federal Services; formerly Cybersecurity Chief Strategist, Coalfire Federal/Veris Group
- Jim Williams, Partner, Schambach and Williams Consulting, LLC; former Administrator, GSA

For complete bios of our distinguished panelists and more information, please visit our website at [www.SSAB.gov](http://www.SSAB.gov).

## **Independent Study to Document and Evaluate the Selection of Representative Payees**

### **Researchers:**

- Pamela Teaster, Professor, Center for Gerontology, Virginia Tech
- Erica Wood, Attorney at Law, Commission on Law and Aging, American Bar Association
- Laura Sands, Professor, Center for Gerontology, Virginia Tech

### **Stakeholders:**

- Stacy Braverman Cloyd, Deputy Director of Government Affairs, National Association of Social Security Claimants' Representatives (NOSSCR)
- Kathryn Olson, Staff Director, House Ways and Means Social Security Subcommittee (Majority)
- Amy Shuart, Minority Staff Director, House Ways and Means Social Security Subcommittee (Minority)
- Lara Rosner, Professional Staff, House Ways and Means Social Security Subcommittee (Minority)
- Dave Timmons, Professional Staff, Senate Finance Committee (Majority)
- Tom Klouda, Senior Domestic Policy Advisor, Senate Finance Committee (Minority)
- Daniel Hatcher, Professor of Law, University of Baltimore

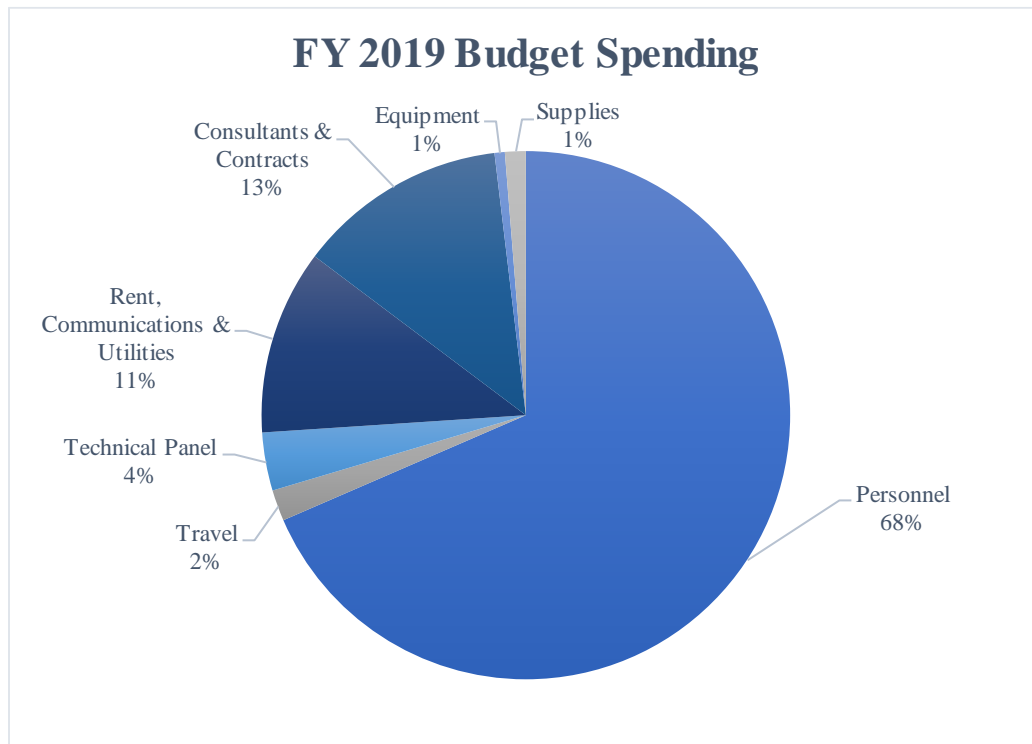


- Stephen Evangelista, Assistant Deputy Commissioner, Retirement and Disability Policy, SSA
- Dawn Wiggins, Associate Commissioner, Income Security Programs, SSA
- Naomi Karp, Senior Policy Analyst, Consumer Financial Protection Bureau
- Jeremiah Shofield, Deputy Associate Commissioner, Public Service and Operations Support, SSA
- Curt Decker, Executive Director, National Disability Rights Network
- Zach Martin, Deputy Executive Director of Special Projects, National Disability Rights Network
- Crystal Perry, Payee Project Manager, National Disability Rights Network
- Susanne Horn, Payee Program Manager, Bread for the City
- Lauren Taylor, Payee Benefits Coordinator, Bread for the City
- Naomi Karp, Senior Policy Analyst, Consumer Financial Protection Bureau
- Peggy Murphy, President, National Council of Social Security Management Associations (NCSSMA)
- Chris Detzler, Immediate Past President, NCSSMA
- David Lescarini, Vice President, NCSSMA
- Joe Deaton, Executive Officer, NCSSMA

#### ***Site Visits:***

- Fairfax, Virginia, February 6, 2019
- Hot Springs, Arkansas, March 3-6, 2019
- Great Falls and Helena, Montana, April 30-May 2, 2019
- Vancouver and Longview, Washington, May 7-9, 2019
- McMinnville, Tennessee, May 21-23, 2019
- Glen Burnie, Maryland, June 5, 2019

### III. SSAB Budget



FY 2019 Budget Expenditures	
Object Class	Amount
Personnel	\$ 1,599,814
Travel	\$ 44,511
Technical Panel	\$ 83,147
Rent, Communications & Utilities	\$ 264,281
Printing & Reproduction	\$ -
Consultants & Contracts	\$ 299,708
Equipment	\$ 14,684
Supplies	\$ 29,658
TOTAL	\$2,335,803

\*SSAB requested \$2.3 million in Limitation on Administrative Expenses, however received \$2.4 million in appropriation.

**Note:**

- Personnel includes Board and staff salary and benefits.

- Travel covers transportation expenses associated with Board meetings, conferences, events, local travel and transit benefits.
- Technical panel expenses were used for the FY 2019 Technical Panel on Assumptions and Methods.
- Expenses in the rent and communications category include rent, personal devices and courier services.
- Publications were not printed in FY 2019.
- Consultants and contracts category consists of IT/security contract, trainings, facility and conferences, facility and security services.
- Equipment includes IT and office equipment.
- Supplies consist of office supplies and subscriptions.

#### **IV. Legislation Establishing the 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.