

Fiscal Year 2023 Annual Report

Social Security Advisory Board
August 2024

Bob Joondeph, Chair
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Acronyms and Abbreviations

Acronyms Abbreviations	Term
“Act”	Social Security Act
ACOSS	Acting Commissioner of Social Security
AI/AN	American Indian and Alaska Native
“Board”	Social Security Advisory Board
CDI	Cooperative Disability Investigations
CX	Customer Experience
DDS	Disability Determination Services
DI	Disability Insurance
DOT	Dictionary of Occupational Titles
eCBSV	Electronic Consent-based Social Security Number Verification
FY	Fiscal Year
IT	Information Technology
NCDDD	National Council of Disability Determination Directors
OASDI	Old Age, Survivors, and Disability Insurance
OCACT	Office of the Chief Actuary
OIS	Occupational Information System
SSA	Social Security Administration
SSAB	Social Security Advisory Board
SSI	Supplemental Security Income

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Message from the Chair

Publication of this report was delayed due to a 113-day loss in a quorum of Board members. While the Board has not had a full 7-member Board since September 2016, this is only the second time in the Board’s history that the Board lost a quorum for an extended period.¹ According to its authorizing statute, “Four members of the Board (not more than 3 of whom may be of the same political party) shall constitute a quorum for purposes of conducting business.”

In FY 23, the Social Security Advisory Board (“Board”) continued its mission to educate the public and to advise the President, Congress, and the Commissioner of Social Security on policies related to the Social Security and Supplemental Security Income (SSI) programs. The Board met virtually throughout FY 23, with the exception of its first in-person site visit in several years. SSA offices were open to the public, which allowed the Board an opportunity to visit two SSA field offices and a Cooperative Disability Investigations (CDI) unit to see firsthand the agency’s day-to-day service to the public and to learn about service challenges from staff.

Additionally, the Board commissioned a report on overpayments entitled [*Raising the Alarm on the Unintended Consequences of Social Security’s Return to Work Policies*](#), hosted a virtual expert roundtable to discuss actuarial assumptions about mortality, disability, and the future of work, and issued a letter to Congress advocating for the confirmation of a new Commissioner of Social Security and recommending changes to the statute governing future appointments to the SSA Commissioner position. The Board’s substantive research included a report on the SSA/Disability Determination Services (DDS) relationship, a statement on SSI application challenges facing American Indians and Alaska Natives, and a summary of the Board’s FY 21-22 Information Technology (IT) Speaker Series.

As the Board seeks to educate and inform policymakers, Social Security administrators, and the public about Social Security programs and the potential challenges the agency faces in administering these complex programs, we acknowledge and thank the many dedicated SSA employees, advocates, and experts who take the time to inform our work.

Bob Joondeph

Bob Joondeph, Chair

¹ The Board was without a quorum for 115 days in 2012. Mark Warshawsky and Marsha Katz’s terms ended September 30, 2012, leaving only three Board members until Bernadette Franks-Ongoy was appointed by the Senate on January 24, 2013.

About the Board

The Board was established when Social Security became an independent agency in 1994. Its mission is to analyze the nation's retirement and disability programs and advise the President, Congress, and the Commissioner of Social Security on matters of policy and administration of the Old-Age Survivors and Disability Insurance (OASDI) and SSI programs.

Board members are appointed by the President and Congress based on their integrity, impartiality, and good judgment, as well as their education, experience, and achievements.²

Each year, the Board identifies topics for examination and associated deliverables, including Board publications, commissioned work, public events, summaries, comments, and letters posted on the Board's website.

The Board's authorizing statute outlines the following nine functions:

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 and program 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

² 42 USC 903 (c) (2)

9. making recommendations with respect to such other matters as the Board determines to be appropriate.

Summary of the Board's Work in FY 23

The Board examines social security policy and program administration as part of its mission. The following summarizes the Board's substantive publications under its relevant portfolio. The complete reports are on the Board's [website](#).

Disability Portfolio

Social Security and State Disability Determination Services Agencies: A Partnership in Need of Attention

In April 2023, the Board released [*Social Security and State Disability Determination Services Agencies: A Partnership in Need of Attention*](#), a paper exploring the challenges facing state DDS agencies. DDSs are experiencing unprecedented backlogs.

Approximately one million people are awaiting their disability decision from one of the 52 state DDSs. The Board previously explored the relationship through public roundtable discussions with DDS administrators, staff, and advocates to hear their perspectives on the disability determination process and the support DDSs receive from SSA. The Board also met with former SSA executives to understand how the regulations governing the SSA/DDS relationship facilitate and potentially complicate the efficient and consistent conduct of the disability determination process.

The Board's April 2023 paper provides historical context for the SSA/DDS relationship and considers the inherent tensions resulting from disparate federal and state regulations. Each DDS is fully funded by SSA and expected to follow SSA's legislative and policy interpretations in determining eligibility for disability benefits, however, each DDS is also a state agency and subject to its own state rules about hiring and other administrative functions. While SSA holds ultimate responsibility for policy-compliant disability determinations, it does not control the selection of DDS staff that make those decisions. The paper offers examples of how SSA's management approach helps and hinders the relationship and the disability determination process more broadly and highlights areas warranting further review, including DDS staffing and IT. The report concludes that the precise effects of the pandemic on DDS personnel and performance are difficult to isolate from the combined effects of decades-long trends in funding cuts, staff attrition, and the

increasing size and complexity of DDS workloads. However, key performance metrics indicate that DDSs struggle to keep up with the current environment.

The Board believes long-standing frictions between SSA, state governments, and the DDSs call for ongoing review of how SSA and the DDSs work together and how the agency incorporates DDS needs into its overall strategic, performance, workforce, and contingency plans. The Board will continue to engage with SSA and the DDSs to assess the overall effectiveness of the relationship, as well as how each partner approaches important features of the disability determination process.

Board Commissioned Report: Raising the Alarm on the Unintended Consequences of Social Security's Return to Work Policies

The Board has an ongoing interest in SSA's implementation of return-to-work policies and their effects on beneficiaries. To examine critical issues affecting Social Security disability beneficiaries who return to work, the Board commissioned an [independent report](#) by Urban Institute policy researchers Jack Smalligan and Chantel Boyens. Smalligan is a senior policy fellow in the Income and Benefits Policy Center at the Urban Institute and the principal investigator for the Social Security for Tomorrow's Workforce project. Boyens is a principal policy associate in the Income and Benefits Policy Center at the Urban Institute and focuses on interactions between Social Security programs and retirement, pensions, disability, and paid leave policies. In the paper, Smalligan and Boyens examine work-related overpayments in the Disability Insurance and SSI programs among working beneficiaries and discuss the root causes of overpayments.

The report highlights the unintended disincentives that beneficiaries often experience when they attempt to return to work caused by the design and administration of Social Security's policies. Since beneficiaries who engage in any work are likely to receive an overpayment, this can act as a disincentive to work, feed a perception that work doesn't pay, create confusion, heartache, hardship, and hassle for the beneficiaries, and increase administrative costs for SSA. Individuals receiving Social Security Disability Insurance (DI) and SSI benefits have severe, long-lasting disabilities that often prevent them from doing substantial work. However, many beneficiaries have a desire and capacity to work, perhaps on a limited basis. Both programs include special rules aimed at incentivizing work, and substantial resources have been dedicated to promoting, testing, and evaluating strategies to encourage work among beneficiaries, but recent research shows a high likelihood that beneficiaries who attempt to work will be confronted with an overpayment.

Smalligan and Boyens discuss how current work incentives could be improved. They recommend that the SSA adopt a prospective eligibility and certification process to reduce work-related overpayments. They conclude with options for reform, including lessons from the Supplemental Nutrition Assistance Program (formerly known as food stamps), which greatly overlaps with the SSI population. This paper reflects the authors' views, not necessarily those of the Board or any individual member.

This report has generated significant media interest and has been widely cited in articles investigating SSA's history of overpayments. The *Kaiser Family Foundation Health News* report on Social Security overpayments, which cites the Smalligan and Boyens paper, continues to be distributed across news outlets, including [US News and World Report](#), [ABC News](#), and [AOL](#), as well as local coverage. In additional coverage, [KFF Health News](#) published an investigation on SSA's practice of reclaiming billions of dollars of overpayments, which cites the independent report by Smalligan and Boyens. Cox Media Group developed the story to run on any of their 14 local television stations.

Supplemental Security Income Portfolio

2023 SSI Statement on Application Challenges Facing American Indians and Alaska Natives

Public Law 104-193, The Personal Responsibility and Work Opportunity Act of 1996, permits members of the Board, individually or collectively, to include their views in SSA's Annual Report of the SSI Program to the President and Congress. Since 1998, the Board or one of its members has submitted a statement each year. Previous statements can be accessed on the [Collected SSI Statements](#) page on the Board's website.

Recent executive orders require SSA to evaluate the equity of its programs and service provisions and minimize barriers to access and usability. This year's Board statement, released June 2023, continues the Board's work on access to SSI for underserved populations. [Application Challenges Facing American Indians and Alaska Natives](#) focuses on the American Indian and Alaska Native (AI/AN) population and urges SSA to consider SSI application challenges facing this group. AI/AN people face barriers to accessing SSI across SSA's available service channels. Most AI/AN applicants do not have the option of filing online as the SSI application is not available for most claimants, and others may lack broadband access. Some AI/ANs experience barriers to receiving service in person because they live far away from an SSA field office or cannot easily locate their nearest service site due to usability challenges with SSA's existing online locator tools. Service

challenges with SSA's 800 number, including long wait times, may present additional barriers to applicants who rely primarily on receiving telephone assistance. Across available service options, potential AI/AN SSI applicants may face challenges accessing documentation to show they meet SSI nonmedical and medical eligibility requirements and experience limitations accessing SSA services and resources in their preferred language.

To begin alleviating barriers, the Board recommends more extramural research and outreach to Tribal governments on priorities related to service delivery and data collection. As SSA expands and promotes its existing online services, including developing an online SSI application and considering policy changes to the current SSI application process, engaging with and incorporating feedback from Tribal communities is critical to designing and delivering an application process that reduces barriers and meets the needs of the people it is intended to serve. SSA must also consider populations that cannot or prefer not to receive service through online channels. Expanding and improving its telephone service is one promising area where SSA could lower barriers facing populations that cannot readily access online or in-person services. Above all, the Board states that changes to the SSI application process or SSA's service delivery impacting Tribal Nations should be driven by consultation, partnership, and meaningful inclusion of Tribal governments and AI/AN people in SSA's decision-making.

Solvency Portfolio

Public event - Technical Roundtable: The Future of Mortality, Disability, and Work: Helping to inform the Social Security Trust Fund Projections

Each year, the Board of Trustees reports to Congress on the current and projected financial and actuarial status of the OASDI programs. The Social Security Administration's Office of the Chief Actuary (OCACT), on behalf of the Trustees, projects future OASDI program cost and income based on assumptions about key demographic and economic variables affecting the number of people paying into and receiving benefits from these programs over time. On August 25, 2023, the Board hosted a [public forum](#) that brought together OCACT, in conversation with other experts, to consider the implications of recent research and scientific findings on future expectations for a subset of those variables—mortality, disability, and work. The Board convened three panels of experts to discuss their perspectives and to help inform the assumptions used in projecting the finances of the OASDI Trust Funds.

Panel 1: Mortality

How long people will live is a key consideration for program and trust fund projections. This panel discussed expectations for future mortality trends in light of issues such as COVID-19 and possible future pandemics, rising deaths from drugs, suicide, and chronic liver disease among the working-age population, and rising pediatric mortality.

Panel 2: Disability

OCACT projects the number of people expected to receive disability benefits in the future using three key disability assumptions: incidence, death, and recovery rates. Incidence rates—the proportion of insured workers who file for and are awarded benefits each year based on SSA’s definition of disability - have fallen steeply since 2010 to the lowest levels in decades. OCACT staff who appeared on the panel pointed out that the drop in applications and incidence were remarkably consistent across populations and program types. Panel members offered descriptions of epidemiological and survey research that examines both the types of impairments that might lead to long-term disability as well as the types of accommodations and approaches to supporting employees with disabilities to stay on the job.

Panel 3: Work

This panel discussed expectations about the changing nature of work and factors influencing uncertainty. People qualify for OASDI by paying taxes on their earnings from covered jobs. What work will look like is critical to understanding program contributions and costs. OCACT noted the changing distribution of workers over the last two decades, reflecting a rise in professional occupations, the entry of more women into the workforce at all ages, and the aging population reflected in the workforce as more older workers remain employed. Panelists’ research echoed these demographic shifts.

A video of the full event and bios of each panelist are available on the Board’s [website](#).

IT Systems Modernization Research Portfolio

Throughout its history, the Board has raised the need for SSA to focus on systems modernization. Many service issues with the public can be traced to outdated legacy systems and inefficient IT infrastructure. In 2019, the Board appointed an expert panel to review Social Security’s modernization efforts. The panel examined SSA’s IT Modernization

Plan and issued a report sharing insights and guidance to help the agency achieve its goals. Following the report, the Board hosted a series of expert speakers in 2021 and 2022 in an ongoing effort to help educate the Board and the public about SSA's modernization challenges. The topics included:

1. The History of SSA's IT Systems Development (January 2021)
2. Digital Identity (March 2021)
3. Legacy Systems Modernization (May 2021)
4. Customer Experience (July 2021)
5. Cybersecurity (November 2021)
6. IT Acquisition (January 2022)
7. Systems Security and Usability (February 2022).

In FY 23, SSAB released a [paper summarizing the System Speakers](#). The summary identified key themes from the presentations and some recommendations from the IT Systems Expert Panel's final report.

Service Delivery Portfolio

Board Letter to the Senate Finance Committee

On September 6, 2023, Board Members wrote Senate Finance Chair Ron Wyden and Ranking Member Mike Crapo to urge the Committee to swiftly consider Governor Martin O'Malley's nomination as Commissioner of Social Security. The Board also recommended Congress amend the Social Security Act to state that the Commissioner of Social Security once again serves at the pleasure of the President.

The Board believes that after nearly 30 years, the fixed six-year term for the Commissioner has not been successful. Since March 31, 1995, SSA has had 12 different Commissioners; only two served nearly the full six-year term. In the past decade, SSA has had an Acting Commissioner for eight years. The Board concluded that SSA needs the continuity and leadership authority that a Senate-confirmed Commissioner provides. The [full letter](#) is available on our website.

FY 23 Highlights of Board Meetings

In addition to Board conference calls and regular email communication, the Board held five two-day meetings, one public event, and an end-of-year day-long meeting to determine its research projects for FY 24.

The Board met with SSA executives who provided updates on SSA initiatives, as well as SSA's three largest unions, its management associations, outside advocates, and stakeholders. These meetings are crucial in supporting the Board's current and future research projects. They inform the Board's perspective on SSA's operations and success in communicating and implementing its priorities with different groups. A brief synopsis highlighting some of the topics explored in those meetings is included below. See Appendix A for a list of presenters.

SSA IT Modernization (November)

The Board was briefed twice on SSA's IT modernization efforts. The first briefing from executives in the Office of Systems and the Office of the Commissioner focused on customer experience (CX) initiatives. The second, from SSI advocates, described the creation and effectiveness of the Online Protective Filing Tool, which allows people to submit a request for an appointment to file for benefits and provides a protected filing date.

Disability Effectuation Process (November)

Although often overlooked, effectuation is a large and complex workload for SSA. In discussions about future research, Board members noted that there were increasing concerns about backlogs in the effectuation of benefits and complaints about payment delays and agreed to examine SSA's effectuation process in the FY 23 research plan. To inform the Board's work, SSA provided a detailed walk-through of the effectuation process when a DI, SSI, or concurrent claim has been awarded benefits.

DDS Operations (January)

The Board met with the new leadership team of the National Council of Disability Determination Directors (NCDDD), who outlined policy and legislative changes that the

DDSs felt were necessary to reduce the historic backlog of disability claims pending at the state level. Their recommendations included:

- reinstating the single decisionmaker. The single decisionmaker was piloted at 20 DDSs from 1999 to 2018 and allowed certain types of claims to be adjudicated by experienced examiners without sign-off by a medical /psychological consultant.
- the creation of a position in the Commissioner's office to represent the state DDS concerns.
- a reduction in the collection of work history information required for federal background checks, which negatively impacts their ability to hire new staff.

Finally, they raised ongoing concerns with SSA's systems modernization efforts.

Occupational Information System (January)

The Board received a briefing on the status of the Occupational Information System (OIS) initiated by SSA in FY 2008 to replace the outdated Dictionary of Occupational Titles (DOT), the index of occupations SSA uses in its disability decision-making.

Vocational experts discussed how they use the DOT to inform their testimony at disability hearings. Additionally, the Board heard from a retired executive who worked on the OIS and, in June, followed up with researchers from the Bureau of Labor and Statistics, which has spent the last ten years developing, piloting, and producing data that SSA could incorporate into its current disability determination process.

Site Visits (March)

For the first time since the COVID-19 pandemic, the Board visited SSA field offices to observe operations in person and speak directly to field office managers about the challenges their offices face post-pandemic. The Board also visited a CDI Unit³ for a briefing on how SSA's Office of the Inspector General investigates and prosecutes disability fraud.

³ Within SSA's Office of the Inspector General, the CDI program combats fraud within Social Security disability programs by reviewing questionable disability claims and investigating cases of suspected disability fraud. The program's primary mission is to resolve questions of fraud before benefits are ever paid or to cease benefits of in-payment beneficiaries during the continuing disability review process. Since its inception, CDI investigations have contributed to a projected saving to taxpayers of more than \$7 billion.

Briefing on the Trustees' Report (March)

Social Security's Chief Actuary, Stephen C. Goss, briefed the Board on the actuarial projections outlined in the Trustees' Report and discussed the current and projected financial outlook for the OASDI Trust Funds.

Briefing on the FY 24 President's Budget (March)

SSA executives from the Office of Budget briefed the Board on the President's FY 24 budget and the implications for SSA of not getting the full budget request. They stressed that the budget situation was serious, as SSA has received less than the President's request for 14 of the last 25 years.

SSA Leadership and Operations' Priorities (June)

Acting Commissioner of Social Security (ACOSS) Kilolo Kijakazi briefed Board members on SSA's current initiatives and agency priorities. The ACOSS acknowledged low employee morale and noted that the Office of Strategic Learning is working on morale ideas and tracking employee survey results. The ACOSS then discussed several other initiatives, including the creation of the Office of Transformation for CX and IT modernization, which is currently identifying customer pain points.

Foster Care Data Exchanges with State Welfare Agencies (June)

SSA's Office of Data Exchange, Policy Publications, and International Negotiations briefed the Board on its efforts to establish data exchange agreements with State child welfare agencies to comply with Section 103(a) of the *Strengthening Protections for Social Security Beneficiaries Act of 2018*, which directed SSA to establish data exchange agreements with each state child welfare agency within one year. The presenters acknowledged that as of 2021, SSA had entered into 31 agreements but was only actively sharing data with 14 of them. Barriers to state participation include technical issues and capability, lack of funding or staff, State privacy laws, and COVID-19 delays. Additionally, the presenters noted that while the 2018 Act required SSA to enter into agreements with the states, there was no comparable mandate for the states to comply. The Policy Group informed the Board that SSA had developed a starter kit for distribution in 2024 to remarket the exchange to the 21 states without agreements.

Electronic Consent-Based Social Security Number Verification (eCBSV) (August)

To reduce improper payments and combat fraud, Congress⁴ directed SSA to modify or develop a database that would, with the social security number holder's consent, allow a permitted entity (primarily banks and other financial institutions) to receive an automatic "yes/no" answer to verify whether a customer's information matches SSA records. In response to the congressional mandate, SSA developed a fee-based number verification service and launched the eCBSV pilot in 2020. The Board met with identity experts to discuss the effectiveness of the eCBSV service. While they agreed on the value of an SSA data-sharing tool for identity verification, they expressed concerns that SSA interpreted Congress's directive too narrowly and that the eCBSV provides no information beyond match/no match. They also raised the issue of recurrent fee increases and the substantial annual fees, which disincentivize current users and deter new users.

Governance

As outlined in its bylaws, the Board prepares a report on its activities and budget annually. In the first quarter of FY 23, the Board published its [FY 22 Annual Report](#), summarizing its accomplishments during FY 22 and providing information regarding the Board's budget and expenditures.

In addition to the publication of its research and holding Board meetings, SSAB operates to fulfill the government-wide requirements of an Executive Branch agency. SSAB maintains the focus on systems security required to meet federal standards. In FY 23, SSAB's Systems Engineer provided federally compliant cybersecurity training to all staff and Board members, as well as maintaining systems permissions designed to ensure the safety and integrity of our network and shared online services. The Freedom of Information Act ensures federal transparency and integrity. SSAB received 21 Freedom of Information Act requests for records and documents in FY 23 – of those, 90.4% were processed. Also, during FY 23, SSAB gained access to the Equal Opportunity Employment Commission's e-filing system for the first time and began using it to file required reports. Additionally, the Equal Employment Opportunity Commission approved SSAB's Reasonable Accommodation, anti-harassment, and Equal Employment Opportunity policies; all SSAB staff receive training on those policies. Staff continually work to increase outreach and awareness of the Board's work through its social media presence and strive to improve the agency website and enhance accessibility.

⁴ The Economic Growth, Regulatory Relief, and Consumer Protection Act Pub. L. No. 115-174

Board Appointments, Nominations, and Current Members

House Appointment: Amy Shuart joins the Board

Amy Shuart, of Alexandria, Virginia, [was appointed](#) to the Board by the House of Representatives on October 9, 2022. Shuart has over 15 years of experience in Social Security, identity, and technology policy. Shuart is currently the Vice President of Technology & Innovation at Business Roundtable. She was previously the Head of North America Government Affairs for Onfido, a global digital identity company, where she launched their Washington office. For over a decade, Shuart worked for the Committee on Ways and Means, most recently as the Social Security Subcommittee Staff Director. Shuart started her career as a Presidential Management Fellow at the Social Security Administration in the Office of Retirement Policy and has also worked at the Office of Management and Budget in the Medicare Branch and the White House National Economic Council. Shuart holds a Bachelor of Arts in Political Science, a Bachelor of Arts in Public and Urban Affairs from Virginia Tech, and a Master of Public Affairs from the Lyndon B. Johnson School of Public Affairs at the University of Texas at Austin.

White House Nominations

The President nominated the following three individuals to the Board in FY 23. However, none had been confirmed by the end of the fiscal year.

On January 3, 2023, President Joe Biden renominated Andrew G. Biggs and Sharon Beth Lewis, both of Oregon, to serve on the Board. President Biden nominated Biggs and Lewis in the last Congress, in May 2022 and January 2022, respectively, but pursuant to Senate rules, the nomination was returned to the President at the end of the 117th Congress. If confirmed by the Senate, Lewis would serve until September 30, 2028, filling a seat on the Board that has been vacant since 2020. Biggs would serve until September 30, 2024, and a second term until September 20, 2030, filling a Board seat that has been vacant since 2016.

Lewis is a principal at Health Management Associates and, before that, served in presidentially appointed roles for nearly six years at the Department of Health and Human Services, where she was one of the chief architects of the Administration for Community Living. The Board profiled Lewis in its [January 2022 announcement](#) on the website.

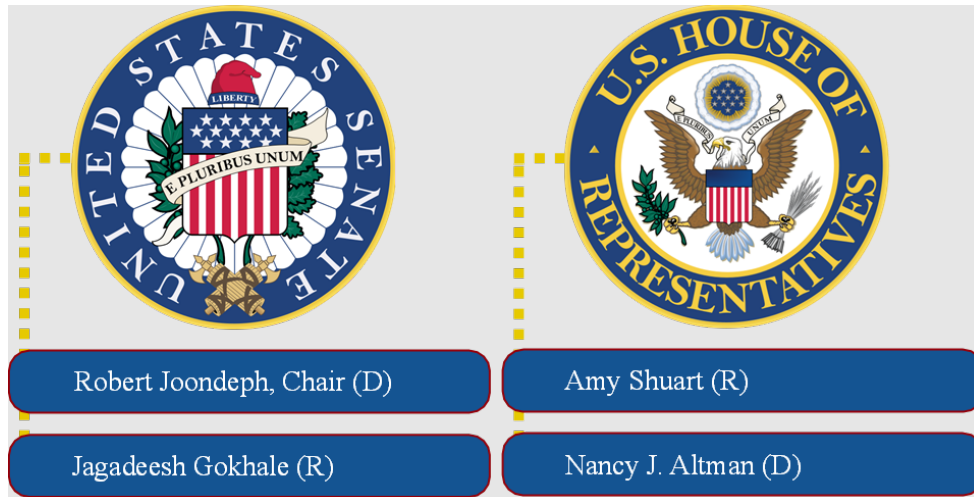
Biggs is a senior fellow at the American Enterprise Institute (AEI). Before joining AEI, Biggs was a principal deputy commissioner at SSA, overseeing policy research efforts, and previously served as an associate director of the White House National Economic Council. The Board profiled Biggs in its [May 2022 announcement](#) on the website.

On January 23, 2023, President Joe Biden announced his intent to nominate Kathryn Lang of Maryland to serve on the Board. The position is subject to Senate confirmation. If confirmed, Lang would serve until September 2026. Lang joins the two other White House nominees who are pending confirmation.

Lang serves as the Director of Federal Income Security at Justice in Aging, a national nonprofit legal advocacy organization. Her advocacy has focused on improving the Social Security and SSI programs, centering on the needs of people of color, women, LGBTQ+ individuals, those living with disabilities, immigrants, and those with limited English proficiency. Before joining Justice in Aging, Lang was an attorney at the Maryland Legal Aid Bureau, where she was an advocate for low-income older adults and persons with disabilities. In previous positions, she worked as an attorney at the National Legal Aid and Defender Association, Bread for the City Legal Clinic, Doherty, Cella, Keane, and Associates, LLP, and Legal Services of Northern California. She received her BA from Oberlin College and her JD from Fordham University School of Law. She also has a master's degree from the University of Pennsylvania in teaching English to speakers of other languages.

FY 23 Board Members and Open Seats

The Board may have as many as seven members. Throughout FY 23, there were four members: two appointed by the Senate and two appointed by the House. If all three pending nominations are confirmed by the Senate, it would be the first time since 2016 that all seven Board seats were occupied. The graphic below shows the Board members in FY 23.



There continue to be three open presidential appointments. The following graphic shows how long the White House appointments have been empty.



The Board's authorizing statute sets forth the appointment process:

- three members shall be appointed by the President, by and with the advice and consent of the Senate. Not more than 2 of such members shall be from the same political party.
- two members (each member from a different political party) shall be 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.

- two members (each member from a different political party) shall be 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.
- Each member of the Board shall serve for a term of 6 years, except that –
 - a member appointed to a term of office after the commencement of such term may serve under such appointment only for the remainder of such term.

Current Board Members



Bob Joondeph, JD, Chair, 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. Bob has represented individuals with disabilities in state and federal courts, agencies, and legislatures. He 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. Bob 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, and is a graduate of Case Western Reserve Law School and Brown University.



Amy Shuart has over 15 years of experience in Social Security, identity, and technology policy. Shuart is currently the Vice President of Technology & Innovation at Business Roundtable. She previously was the Head of North America Government Affairs for Onfido, a global digital identity company, where she launched their Washington office. For over a decade, Shuart worked for the Committee on Ways and Means, most recently as the

Social Security Subcommittee Staff Director. Shuart started her career as a Presidential Management Fellow at the Social Security Administration in the Office of Retirement Policy and has also worked at the Office of Management and Budget in the Medicare Branch and

the White House National Economic Council. Shuart holds a Bachelor of Arts in Political Science and a Bachelor of Arts in Public and Urban Affairs from Virginia Tech, and a Master of Public Affairs from the Lyndon B. Johnson School of Public Affairs at the University of Texas at Austin.



Nancy J. Altman, JD, has a forty-five-year background in Social Security and private pensions. Currently, she is President of Social Security Works and Chair of the Strengthen Social Security Coalition. Nancy 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, she was Alan Greenspan's assistant in his position as Chairman of the bipartisan commission that developed the 1983 Social Security amendments. Nancy 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 and *Social Security Works for Everyone! Protecting and Expanding the Insurance Americans Love and Count On*. She has an AB from Harvard University and a JD from the University of Pennsylvania Law School.



Jagadeesh Gokhale, PhD, is Director of Special Projects at Wharton Budget Model. Prior to joining Wharton, Dr. Gokhale was Senior Fellow at the Cato Institute. An economist by training, Jagadeesh's main research fields are macro and public economics, with a particular focus on the effects of fiscal policy on future generations. He 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, Jagadeesh published *Social Security: A Fresh Look at Policy Alternatives*, which constructs a different method for determining the solvency of the Social Security trust funds. Jagadeesh is published in numerous professional journals and newspapers such as *The Wall Street Journal*, *The Financial Times*, *The Washington Post*, and *Forbes*.

Appendices

Appendix A - FY 23 Board Meetings and Public Sessions

In FY 23, the Board met with SSA leadership, staff, unions, actuaries, as well as many experts from both the private and the public sectors. The Board is grateful to all those who shared their knowledge and expertise; we could not do our work without them. We would like to acknowledge them here.

November 17 – 18, 2022

On **November 17**, the Board met in executive session.

Executive Session

- Silvana Marr-Madariaga, Paralegal, SSI unit, Community Legal Services of Philadelphia, PA
- Mark Maher, Attorney, SSI unit, Community Legal Services of Philadelphia, PA
- Jane Johnson, Accredited Disability Representative, Foothills Disability Law, Hickory, NC. Member, National Association of Disability Representatives
- Jeanne Morin, Public Policy Advisor, National Association of Disability Representatives

On **November 18**, the Board met in executive session.

Executive Session

- Patrick Newbold, Assistant Deputy Commissioner, and Deputy Chief Information Officer, Office of Systems, SSA
- Kim Baldwin Sparks, Customer Experience Officer, Office of the Commissioner, SSA
- Eric Powers, Acting Chief Business Officer, Office of the Commissioner, SSA
- Betsy Beaumon, Senior Advisor, Office of the Commissioner, SSA
- Fran Huber, Senior Executive Analyst, Office of the Commissioner, SSA
- Ben Belton, Senior Advisor, Office of the Commissioner, SSA

Executive Session

- Karen Girardeau, Senior Advisor, Office of Public Service and Operations Support, SSA
- Samara A. Richardson, Senior Advisor, Office of Operations, SSA
- Fran Huber, Senior Executive Analyst, Office of the Commissioner, SSA
- Ben Belton, Senior Advisor, Office of the Commissioner, SSA
- Grace Kim, Deputy Commissioner, Office of Operations, SSA
- Erik Jones, Assistant Deputy Commissioner, Office of Operations, SSA
- Stephanie Hall, Assistant Deputy Commissioner, Office of Operations, SSA

January 26 – 27, 2023

On **January 26**, the Board met in executive session.

Executive Session

- Jack Smalligan, Senior Policy Fellow, Urban Institute
- Chantel Boyens, Principal Policy Associate, Income and Benefits Policy Center, Urban Institute

Executive Session

- Jacqueline Russell, President, NCDDD, DDS Director, North Carolina
- Leon Scales, Past President, NCDDD, DDS Director, Virginia
- Brian Garber, President-Elect, NCDDD, DDS Director, Florida

On **January 27**, the Board met in executive session.

Executive Session

- Dr. Michelle Aliff, Vocational Expert, Aliff Vocational Consultants, Adjunct Professor, University of North Texas
- Dr. Amy Vercillo, Vocational Rehabilitation and Re-employment Specialist, Adjunct Professor, Rehabilitation Counseling, UMass, Boston
- Jeanne Morin, President, Public Policy Advisors

Executive Session

- Dr. David Weaver, former SSA Executive, Statistics Instructor, University of South Carolina

Executive Session

- Sean Brune, Deputy Commissioner Systems, Chief Information Officer, SSA
- Patrick Newbold, Assistant Deputy Commissioner and Deputy Chief Information Officer, Office of Systems, SSA

February 15, 2023

The Board met in executive session.

Executive Session

- Scott Frey, Chief of Staff, Office of the Commissioner, SSA
- Ben Belton, Senior Advisor, Office of the Commissioner, SSA

March 30 – 31, 2023

On **March 30**, the Board conducted site visits at the SSA field offices in Washington, DC, Alexandria, VA, and the CDI Unit in Washington, DC.

On **March 31**, the Board met in executive session.

Executive Session

- Michelle King, Deputy Commissioner, Office of Budget, Finance, and Management, SSA
- Chad Poist, Associate Commissioner, Office of Budget, Office of Budget, Finance, and Management, SSA

Executive Session

- Jessica LaPointe, President, AFGE Council 220
- Edwin Osorio, 1st Vice President, AFGE Council 220
- Sherry Jackson, 2nd Vice President, AFGE Council 220
- Jeff Cruz, Legislative Representative, AFGE
- Rich Couture, President, AFGE Council 215

Executive Session

- Stephen C. Goss, Chief Actuary, SSA
- Karen Glenn, Deputy Chief Actuary, SSA

JUNE 22 – 23, 2023

On **June 22**, the Board met in executive session.

Executive Session

- Kilolo Kijakazi, PhD, Acting Commissioner, (SSA)
- Scott Frey, Chief of Staff, SSA
- Ben Belton, Senior Advisor, Office of the Commissioner, SSA
- Andrea Moore, Executive Assistant, Office of the Commissioner, SSA

Executive Session

- Christopher Tino, Senior Advisor, Office of Retirement and Disability Policy, SSA
- Richarde A. Graham, Director, Office of Data Exchange, Policy Publications, and International Negotiations, Office of Data Exchange, Policy Publications, and International Negotiations, Office of Retirement and Disability Policy, SSA
- Vivian D. Adebayo, Branch Chief, State and Private Industry Agreements Branch, Office of Data Exchange, Policy Publications, and International Negotiations, Office of Data Exchange, Policy Publications, and International Negotiations, Office of Retirement and Disability Policy, SSA
- Thomas Bangs, Senior Analyst, State and Private Industry Agreements Branch, Office of Data Exchange, Policy Publications, and International Negotiations, Office of Data Exchange, Policy Publications, and International Negotiations, Office of Retirement and Disability Policy, SSA

On **June 23**, the Board met in executive session.

Executive Session

- Jeremy Graboyes, Research Director, Administrative Conference of the United States
- Matthew Gluth, Attorney Advisor, Administrative Conference of the United State

Executive Session

- Tamara Harney, Division Chief, Office of Compensation and Working Conditions, Bureau of Labor and Statistics, Department of Labor
- Mariah Arraya, Program Coordinator, Occupational Requirements Survey, Office of Compensation and Working Conditions, Bureau of Labor and Statistics, Department of Labor

Executive Session

- Dan Chenok, Executive Director, IBM Center for The Business of Government
- Mark Newsome, Vice President and Senior Partner, US Federal Healthcare, IBM Consulting, and Fellow, IBM Center for The Business of Government
- Jason Prow, Vice President and Senior Partner, Federal Automation and Data Platforms Leader, IBM Consulting
- Greg Keefe, Healthcare and Benefits Leader, IBM Consulting
- Chris Robinson, Associate Partner and Automation Leader, Automation and Data Platforms, IBM Consulting
- Rajat Paul, Chief Automation Architect, Intelligent Automation - US Federal, IBM Global Services, IBM Consulting
- John Wright, Project Management Assistant, IBM

August 24 – 25, 2023

On **August 24**, the Board met in executive session.

Executive Session

- Michelle King, Deputy Commissioner, Operations, SSA

- Eric Skidmore, Assistant Deputy Commissioner, Operations, SSA
- Linda Kerr-Davis, Acting Assistant Deputy Commissioner, Operations, SSA

Executive Session

- Katie Wechsler, Co-executive Director, The Consumer First Coalition
- Jeremy Grant, Managing Director, Technology Business Strategy, Cybersecurity Risk Management Group, Venable, LLC

On **August 25**, the Board hosted an all-day public forum on the future of mortality, disability, and work in partnership with the Social Security Administration's Office of the Chief Actuary.

Public Session

Panel 1

- Robert Anderson, PhD, Chief, Mortality Statistics Branch, National Center for Health Statistics, Centers for Disease Control and Prevention
- David M Cutler, PhD, Otto Eckstein Professor of Applied Economics, Harvard University
- Karen Glenn, FSA, EA, MAAA, Deputy Chief Actuary for Long-Range Actuarial Estimates, OCACT, SSA
- Stephen C Goss, ASA, MAAA, Chief Actuary, OCACT, SSA
- Christopher JL Murray, MD, DPhil, Director, Institute for Health Metrics and Evaluation (IHME); Professor and Chair of Health Metrics Sciences, University of Washington
- Christopher J Ruhm, PhD, Professor of Public Policy and Economics, University of Virginia
- Steven Woolf, MD, MPH, Professor and C. Kenneth and Diane Wright Distinguished Chair in Population Health and Health Equity, Virginia Commonwealth University

Panel 2

- Stephen C Goss, ASA, MAAA, Chief Actuary, OCACT, SSA
- Allen W Heinemann, PhD, Professor of Physical Medicine and Rehabilitation, Northwestern University Feinberg School of Medicine

- Christopher JL Murray, MD, DPhil, Director, IHME; Professor and Chair of Health Metric Sciences, University of Washington
- David Shaywitz, MD, PhD, VP Distinguished R&D Fellow, Data & Digital, Takeda; Lecturer, Harvard Medical School; Adjunct Fellow, American Enterprise Institute*
- Michael L Stephens, ASA, Acting Deputy Chief Actuary for Short-Range Actuarial Estimates, OCACT, SSA

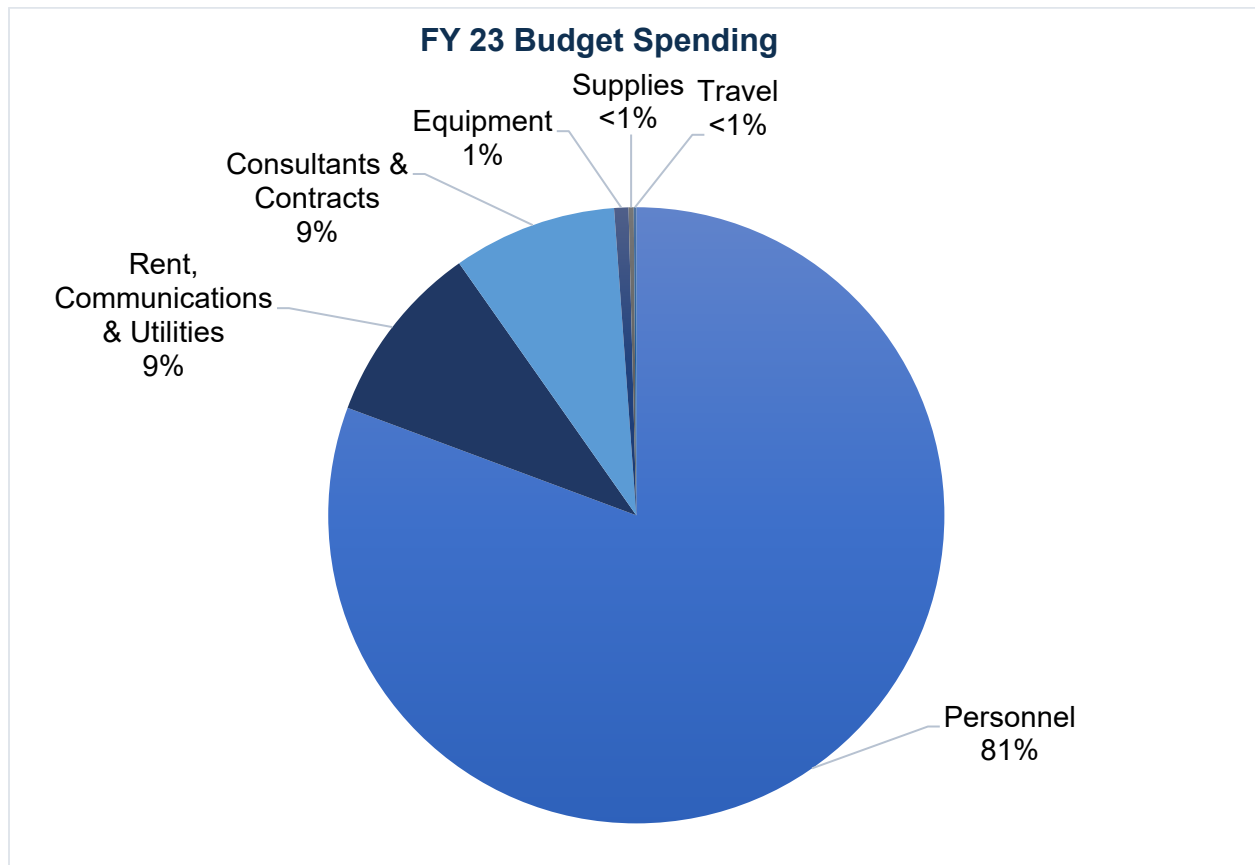
Panel 3

- Karen Glenn, FSA, EA, MAAA, Deputy Chief Actuary for Long-Range Actuarial Estimates, OCACT, SSA
- Stephen C Goss, ASA, MAAA, Chief Actuary, OCACT, SSA
- Stipica Mudrazija, PhD, Assistant Professor of Health Systems and Population Health, University of Washington
- Steven W Popper, PhD, Senior Economist and Professor, Pardee RAND Graduate School
- Shelly Steward, PhD, Director, Future of Work Initiative, Economic Opportunities Program, Aspen Institute

September 28, 2023

On **September 28**, the Board met internally to discuss FY 24 Research projects.

Appendix B - SSAB Budget



FY 23 Budget Expenditures

Object Class	Amount
Personnel	\$ 2,275,197
Rent, Communications & Utilities	\$ 270,044
Consultants & Contracts	\$ 242,552
Equipment	\$ 21,160
Supplies	\$ 7,562
Travel	\$ 3,789
Printing & Reproduction	\$ -
TOTAL	\$ 2,820,304

The Board's appropriated amount for FY 23 was \$2.7 million. SSA provided an additional \$145,000 to SSAB for FY 23 expenditures. Expenses reflect the status of funds at the end of the FY.

- Personnel includes Board and staff salaries and benefits.
- Consultants and contracts category consists of contracts, interagency/inter-personnel services, experts, temporary help services, trainings, conferences, facility and security services.
- Expenses in the rent and communications category include rent, personal devices, UPS, and courier services.
- Supplies and equipment include office supplies and subscriptions as well as IT and office equipment.
- Travel covers transportation expenses associated with Board meetings, local travel and transit benefits.
- Publications were not printed in FY 23.

Appendix C - FY 23 Staff Bios

Claire Green, Staff Director

Claire joined SSAB in October 2012 as the Deputy Staff Director and became the permanent Staff Director in September 2013. She oversees all aspects of Board work and agency operations. Prior to joining SSAB, Claire worked as a Congressional Fellow for the Senate Finance Committee. Her portfolio included Social Security program and policy issues, administrative budget, and trust fund solvency concerns. Before that, she worked as an attorney in Social Security hearings components, both in hearing offices and later in headquarters. Claire holds a JD from Western State University College of Law and graduated with honors from Assumption College in English and Sociology. She is also a member of the National Academy of Social Insurance.

Sunny Bick, Management Analyst

Sunny Bick joined the Board staff in January 2020 as a Management Analyst.

Sunny has varied responsibilities on both the Operations and Research Teams, including administrative functions, outreach, drafting the agency's Annual Report, and assisting with research projects. Before joining SSAB, Sunny had a research background in molecular biology. Most recently, she worked as a senior researcher in the transgenics lab at the Mayo Clinic's Institute of Neurodegenerative Diseases in Jacksonville, Florida, studying the pathology of Alzheimer's Disease. Her previous work at Stanford University's Hopkins Marine Lab involved marine species' genetic diversity and adaptation to environmental stress. Sunny graduated with honors from the University of Maryland, receiving a BS in microbiology and biochemistry.

Diane Brandt, Research Director

Diane joined SSAB in September 2017 as a Senior Advisor. She assists with planning and conducting research activities in support of the Board's mission. Diane's career with the federal government began in 2008 as a protocol manager for the National Institutes of Health (NIH) Clinical Center, Rehabilitation Medicine Department, Epidemiology and Biostatistics Section. Diane worked principally on an interagency agreement with SSA to support the agency's disability programs. In addition to a diverse clinical background in physical therapy, her research interests include public policy/health policy and implications for vulnerable populations; and the geospatial implications of policy outcomes. Diane holds a BS in physical therapy from the University of Missouri – Columbia, an MS specializing in gerontology and neurorehabilitation from Washington University in St. Louis, and an MA and PhD from the University of Missouri – St. Louis in political science, specializing in public and health policy.

Cheri Cannon, General Counsel

Cheri Cannon joined the Board in April 2021 as the General Counsel. She provides legal advice on personnel policy and processes, fiscal matters, and the interpretation of Board documents and statutes. She also represents the Board with other administrative bodies, serves as the FOIA and Privacy officials and trains the staff on government-wide requirements. Previously, Cheri was a Partner at Tully Rinckey PLLC and head of the Federal Labor and Employment practice. She was the Managing Partner of the DC office for three years. Previously, she served in the Senior Executive Service at the Air Force as Deputy General Counsel for Fiscal, Ethics, and Administrative Law. Cheri was also the Chief Counsel to the Chairman of the Merit Systems Protection Board (MSPB). Other government service includes 17 years at SBA, where she served in various SES roles. Before joining the government, she was in private practice. She earned a BA in political science (with Honors) from UC Santa Barbara and a JD from Georgetown University Law Center.

Stacy Cloyd, Senior Research Attorney

Stacy Cloyd is a Senior Research Attorney. Stacy joined the Board in July 2022. Her interests include Social Security Disability Insurance; Supplemental Security Income; and how SSA interacts with the public, other federal agencies, and state and local governments. Stacy previously spent seven years at the National Organization of Social Security Claimants' Representatives, departing as the Director of Government Affairs. She has also served as Senior Domestic Policy Analyst at Bread for the World Institute, staff attorney and disability practice supervisor at Bread for the City's legal clinic, and volunteer attorney and mentor at the DC Bar Pro Bono Center. Stacy received an AB magna cum laude in government from Smith College. Her JD (cum laude) and Master of Urban and Regional Planning degrees are from the University of Michigan. She was elected to the National Academy of Social Insurance in 2017.

Bethel Dejene, Management Officer

Bethel Dejene joined the Board staff in June 2014 as a Research Analyst intern and continued as a Research Analyst on a part-time basis. Then she moved to full-time as a Management Analyst and is currently the Management Officer. Bethel supports in managing the agency operations. Before joining the Board, Bethel was a participant in Capital Area REACH's job-readiness and community service program and completed an internship at the Ethiopian Community Development Council in Arlington, Virginia. Bethel earned a BS in Psychology (cum laude) from George Mason University.

Paul Frazier, IT Systems Engineer

Paul Frazier joined the Board in January 2022 as the Systems Engineer, and is responsible for all aspects of SSAB IT infrastructure, cybersecurity compliance, and SharePoint organization. Before coming to the Board, Paul worked on federal contracts for clients such as the Department of Justice, Centers for Medicare and Medicaid Services, Federal Judiciary, US Navy, and the Social Security Administration.

Conway Reinders, Lead Policy Analyst & Communications Officer

Conway Reinders joined SSAB in 2017 and is currently a Lead Policy Analyst and Communications Officer. His research focuses on issues related to the quality and accessibility of the Social Security Administration's services. Conway also serves as the agency's Communications Officer, coordinating the Board's messaging, external outreach, and public events. Previously, Conway was a research assistant at the Oxford Poverty & Human Development Initiative and a Special Assistant at the Hamilton Project at the Brookings Institution. He holds a BA from the George Washington University, graduating magna cum laude in economics (special honors) and international affairs. In 2021, Conway was elected to the National Academy of Social Insurance.

Jenn Rigger, Senior Advisor

Jenn Rigger joined the Board in March 2015 as a detailee from Social Security. She was later hired as a Senior Advisor. Her areas of focus include the disability determination process, the partnership of SSA and the state Disability Determination Services agencies, and enumeration/death data reporting. With over 30 years in and around the federal government, Jenn worked on the state/federal vocational rehabilitation program while at the Department of Education's Rehabilitation Services Administration and on SSA's support of disability beneficiaries' return-to-work efforts. Jenn's federal career began on Capitol Hill. She also was active in presidential primary campaigns. She holds a BS in political science and history from James Madison University.

Emily Roessel, Senior Researcher

Emily joined the Board in July 2022. Her areas of focus include retirement and financial security. Emily previously worked at the Social Security Administration as a Presidential Management Fellow and then as a Social Science Research Analyst in the Office of Research, Demonstration, and Employment Support. At SSA, Emily conducted research on the return-to-work efforts of Social Security disability beneficiaries. She has also worked at Abt Associates and the Brookings Institution. Emily received a BA in applied math-economics from Brown University and an MPP from the University of Michigan. She was elected to the National Academy of Social Insurance in 2023.

Omar Shalabi, Data and Program Analyst

Omar Shalabi first came to the Board in September 2019 as a Research Intern and joined as a permanent employee in April 2020. Omar graduated with a BA in Economics from the University of Maryland, completing a research practicum with the strategic advisory and mergers & acquisitions firm Kaulkin Ginsberg. At Kaulkin Ginsberg, Omar studied the student loan market, particularly regulatory changes and loan issuance and collection trends.

SSAB Staff that left the agency in FY 23

Pamela Crawford, Senior Advisor

Emma Tatem, Lead Policy Analyst

About the Board

The Social Security Advisory Board is a bipartisan federal agency established in 1994 to advise the President, Congress, and Commissioner of Social Security on matters of policy and administration of the Old-Age, Survivors, and Disability Insurance and Supplemental Security Income programs. The Board has up to seven members, appointed by the President, Senate, and House of Representatives.