

Social Security Advisory Board

FY 2021 Annual Report

February 2022



SSAB SOCIAL SECURITY ADVISORY BOARD

FY 2021 by the Numbers

12 ALL-DAY BOARD MEETINGS



5 RELEASED PUBLICATIONS

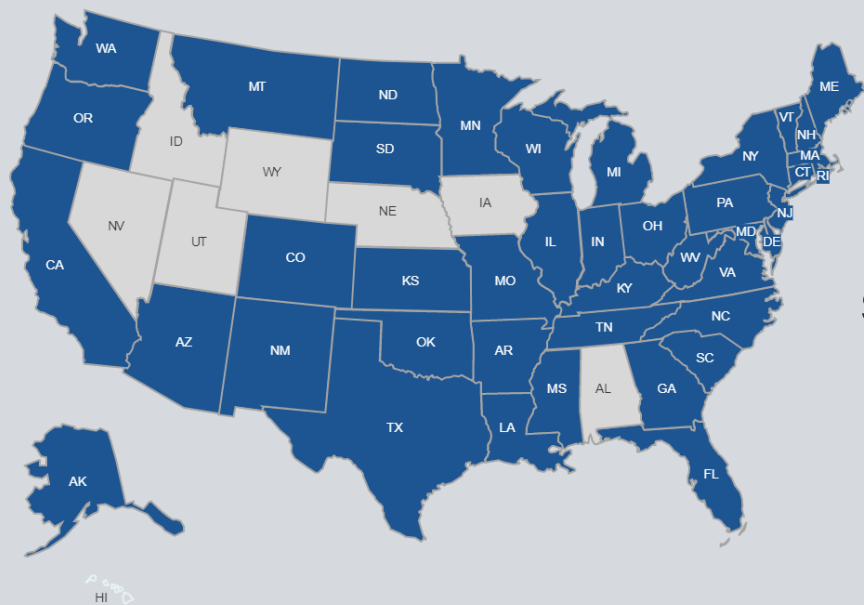


10 PUBLIC EVENTS



Covering IT, disability, supplemental security income, and equity

EVENT ATTENDANCE BY STATE



Attendees represented **41** states, Puerto Rico, and the District of Columbia



62,506
Twitter impressions

IT Systems Speakers Series



4 sessions with **316** total attendees



200
MEDICAL EVIDENCE
ROUNDTABLE
PARTICIPANTS



46K+
WEBSITE VISITS

Table of Contents

Message from the Chair.....	3
About the Board.....	4
FY 2021 Research Portfolios	5
Disability	5
<i>Roundtable on Medical Evidence Collection</i>	5
<i>Roundtable on State Agencies' Role in Disability Determinations</i>	6
SSI	6
<i>Roundtable on Long-Standing SSI Dedicated Account Challenges</i>	6
<i>2021 SSI Statement on Dedicated Accounts</i>	7
Service to the Public	7
<i>Roundtable on Social Security's Public Service</i>	7
<i>Federal Register Comment on Equitably Improving Service to Underserved Populations</i>	8
IT Systems	8
<i>Report by the Independent IT Systems Expert Panel</i>	8
<i>Systems Speaker Series Sessions on IT Modernization</i>	9
Solvency	9
<i>Public Session on Assessing Social Security's Financial Outlook</i>	10
Additional Research Activities	10
Recommendations to RDRC and Office of the Inspector General	10
Outreach and Public Education.....	11
Governance.....	11
Annual Report Covering FY 2020.....	11
Bob Joondeph Named SSAB Chair	12
Jagadeesh Gokhale Reappointed to a Third Term	12
FY 2021 Board Members	12
Board Staff.....	15
Appendices.....	16
FY 2021 Board Meetings and Public Sessions	16
IT Systems Expert Panel.....	24
SSAB Budget	26

Message from the Chair

In fiscal year 2021 (FY 21), the Social Security Advisory Board ("Board") carried on its mission to provide advice to the President, Congress, and Commissioner of Social Security on the Social Security and Supplemental Security Income (SSI) programs. The Board sought to educate and inform policymakers, Social Security administrators, and the public about Social Security programs and potential challenges the agency faces in administering these complex programs. This annual report provides an overview of the Board's work.

In FY 21, the Board continued its examination of Social Security programs and issued four publications: a summary of the Board's roundtable on disability process improvements, a Federal Register comment on equitably improving service to underserved populations, the Board's annual statement on the SSI program which reexamined long-standing SSI dedicated account challenges, and the Board's FY 20 annual report. Additionally, the Board released the report of its independent Board-commissioned panel on Social Security's systems modernization efforts. In addition to publishing reports, the Board hosted ten virtual public events attended by over 1,000 people from 41 states. There was a session with the Board's independent panel to discuss the panel's key findings. There were four roundtables on areas the Board is currently examining and four sessions that addressed specific aspects of systems modernization. And, after the release of the Social Security 2021 Trustees report, the Board hosted a discussion on Social Security's financial outlook, with Social Security's Chief Actuary and two noted economists.

The Board would like to thank Social Security Administration (SSA) employees and the many stakeholders and experts who met with us throughout the year. They provided critical insights, and our work would not be possible without them.



Bob Joondeph, Chair

About the Board

The Board is a bipartisan, independent, federal government agency established in 1994. The Board analyzes the nation's retirement and disability programs and advises the President, the Congress, and the Commissioner of Social Security on matters of policy and administration of the Old-Age, Survivors Insurance (OASI) and Disability Insurance (DI) and the SSI programs. Board members are appointed by the President, the President pro tempore of the Senate, and the Speaker of the House of Representatives. The statute requires that members are chosen based on their integrity, impartiality, and good judgment and because of their education, experience, and achievements.¹

The Board's research is framed by its authorizing statute, which sets out nine broad functions listed below. The Board's research portfolios identify priority topics for examination and associated deliverables, including publications and public events posted on the Board's website. The nine broad functions are:

1. analyzing the Nation's retirement and disability systems and making recommendations with respect to how the OASI and DI programs and the SSI 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 OASI and DI 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 OASI and DI programs and the SSI 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
9. making recommendations with respect to such other matters as the Board determines to be appropriate.

¹ 42 U.S.C. 903 (c) (2))

In FY 21, the Board's work encompassed eight of these functions. The functions relevant to each research portfolio are included in the descriptions below. All Board reports and public sessions can be found on the Board's [website](#). The Board continually seeks to build on these research portfolios in fulfilling its mission.

FY 2021 Research Portfolios

Disability

- *Function 5 (F5) – making recommendations with respect to policies and regulations regarding the OASI, DI, and SSI programs*
- *F6 – increasing public understanding of the Social Security system*

Building on its FY 20 work, in October 2020, the Board published a [Summary of Disability Process Improvement Roundtables](#). These staff-authored summaries synthesized ideas raised during a series of Board-hosted roundtables between March 2019 and May 2020 on potential improvements to SSA's disability determination process. The Board also held two subsequent roundtables described below, one focused on medical evidence collection and the other on work conducted by state Disability Determination Services (DDS) agencies. Videos of both roundtable proceedings are posted on the Board's public website.

Roundtable on Medical Evidence Collection

On July 29, 2021, the Board brought together state DDS managers and staff, a claimant attorney, and former Social Security executives for a [roundtable](#) on the agency's medical evidence collection. The first session, *The Evidence Collection Process*, introduced the types and formats of medical evidence and the process for collecting it, including the roles and responsibilities of those involved. The second session, *State Approaches to Collecting Evidence*, defined the forms and sources of medical evidence acceptable to SSA and the different technologies that facilitate collection. Additionally, participants discussed the unique challenges COVID has presented and changes in health care services.

Roundtable on State Agencies' Role in Disability Determinations

On September 23, 2021, the Board hosted a [roundtable](#) on the federal regulations governing state DDS offices and the challenges they face administering Social Security's disability programs. The roundtable video is posted on the Board's public website.

Two former Social Security executives briefed the Board on the administrative regulations that set out the roles and responsibilities of SSA and the state agencies in the disability determination process. Next, four DDS Directors – representing agencies of varying size and organizational structure and states with different demographic and socioeconomic characteristics – described the unique challenges they face managing disability determinations in their states and those shared by state agencies across the country. These challenges include administrative, technical, and personnel issues that Directors address when administering DDS in their respective states. They recounted their experiences during COVID and discussed such topics as claim development, including medical evidence and consultative examinations, workload management, systems technology, and inter-agency communications with SSA.

SSI

- *F5 – making recommendations with respect to policies and regulations regarding the Old-Age, Survivors, and Disability Insurance program and the Supplemental Security Income program;*
- *F6 – increasing public understanding of the Social Security system;*

Roundtable on Long-Standing SSI Dedicated Account Challenges

On November 19, 2020, the Board held a roundtable expanding on questions generated from its 2019 SSI statement on dedicated accounts. The roundtable video is posted on the Board's public website. The [roundtable](#) examined the purpose, oversight, administration, and impact of dedicated accounts on recipients, their payees, and SSA. It also explored potential solutions to address long-standing and contemporary challenges associated with the accounts. Participants included current and former SSA leadership, representatives of the National Council of Social Security Management Associations (NCSSMA), legal advocates for dedicated account recipients, and a parent who administers a dedicated account on behalf of her child. All shared their expertise and perspectives, which the Board documented in the [2021 SSI](#)

[Statement](#). There was generalized agreement among roundtable panelists that SSA's dedicated account policy is complex to understand and difficult to adjudicate. Concerns expressed to the Board included delayed processing of dedicated account expenditure requests and the misalignment between allowable fund uses and actual needs of the recipients.

2021 SSI Statement on Dedicated Accounts

Public Law 104-193 permits members of the Board, either individually or collectively, to include their views in SSA's annual report of the SSI program delivered to the President and the Congress.

The Board's [2021 SSI statement](#) built on its work in FY 19 examining dedicated account policy and its impact on SSI recipients and their families, payees, and SSA. It also summarized available data on dedicated accounts, past recommendations to modify or eliminate them, and administrative flexibility available to the Commissioner to make changes absent legislative action.

Service to the Public

- *F4 – making recommendations with respect to the quality of service that the Administration provides to the public;*
- *F6 – increasing public understanding of the Social Security system;*
- *F7 – making recommendations with respect to a long-range research and program evaluation plan for the Administration;*

Roundtable on Social Security's Public Service

On May 20, 2021, the Board hosted a [roundtable](#) examining Social Security's service to the public. The roundtable featured research on the effects of the COVID pandemic on Social Security and the people who access its services; identifying underserved populations and relevant research questions for inclusion in Social Security's learning agenda; and demonstrating how Social Security can use customer experience data to improve public service. The roundtable video is posted on the Board's public website.

Federal Register Comment on Equitably Improving Service to Underserved Populations

The Board submitted a [public comment](#) in response to the Office of Management and Budget's (OMB) request for information on "Methods and Leading Practices for Advancing Equity and Support for Underserved Communities through Government." OMB will use the submissions as it helps agencies implement Executive Order 13985. Per the order, SSA must assess whether its programs equitably serve all eligible people, particularly those historically underserved. The Board's response encourages OMB and SSA to use evidence and engage stakeholders to inform decisions aimed at reducing public burden.

IT Systems

- *F6 – increasing public understanding of the Social Security system;*
- *F8 – reviewing and assessing any major studies of Social Security as may come to the attention of the Board;*
- *F9 – making recommendations with respect to such other matters as the Board determines to be appropriate*

Report by the Independent IT Systems Expert Panel

The Board recognizes the importance of SSA's efforts to modernize its IT systems and the need for SSA to continue examining and updating its systems technology. To that end, the Board commissioned an independent panel of systems experts to review SSA's IT modernization plan. In FY 21, the Board's independent IT Systems Expert Panel ("Panel") released a report, entitled, [*Essential Changes Imperative for the Success of Social Security's IT Modernization and Future Operations*](#). The Panel reviewed SSA's progress on its systems modernization from the perspective of end-users inside and outside the agency. The Panel report included specific recommendations in four key areas: operating model, governance infrastructure, IT modernization strategy, and customer experience. Social Security responded favorably to the report and indicated it was incorporating several recommendations into its modernization efforts. On January 29, 2021, the Board hosted a [public webinar](#) during which the IT Systems Expert Panel presented its findings.

Systems Speaker Series Sessions on IT Modernization

The Board also examined broader modernization efforts across the federal government and private sector. In FY 21, the Board initiated a [systems speaker series](#) to educate the public and examine issues involved in SSA's modernization efforts. The Board hosted four speakers in FY 21. In January 2021, the first presenter, Renny DiPentima, former Deputy Commissioner of Systems at Social Security, provided an historical overview of Social Security's IT systems.

In March 2021, the Board hosted its second public systems speaker series event on digital identity and authentication with two experts: Phil Lam and Blake Hall. Lam, Executive Director of Identity at the General Services Administration, spoke on the Federal government's approach to digital identity as a shared service, including the status of login.gov. Hall, Co-Founder and CEO of ID.me, focused on the identity authentication approach currently used by SSA.

In May 2021, the third systems speaker series event addressed the challenges of modernizing legacy systems and the implications for cybersecurity. Kevin Walsh, Director of IT and Cybersecurity at the Government Accountability Office, and Robert Klopp, Owner/Principal Consultant at Skyland Digital Services, Inc. and former Deputy Commissioner for Systems and Chief Information Officer shared their expertise and insights. The discussion moved from IT systems development history and identity authentication, an artifact of an increasingly digitized society, to contextualizing the challenges of updating legacy IT systems.

In July 2021, the Board hosted its fourth systems speaker series event featuring Barbara Morton, Deputy Chief Veterans Experience Officer at the Department of Veterans Affairs (VA), who spoke on customer experience as a driver for modernizing IT. Morton focused on how VA improved the veteran experience by collecting, capturing, and analyzing data and identifying pain points through human-centered design.

Solvency

- *F1 – 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

- *F3 – 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*
- *F6 – increasing public understanding of the Social Security system*

Public Session on Assessing Social Security's Financial Outlook

In August 2021, Social Security's Board of Trustees issued its annual report to Congress outlining the financial outlook for the OASI and DI Trust Funds. By law, the trustees are required to report on the trust funds' financial operations for the immediate past year, their projected operations over the next five years, and their actuarial status. The 2021 OASDI Trustees Report was the first actuarial projection to reflect the potential effects of the COVID pandemic.

The report projects that the Social Security trust funds have enough incoming revenues and reserves to pay full benefits until 2034, after which incoming revenue will be sufficient to pay 78 percent of scheduled benefits. In September 2021, Social Security's Chief Actuary, Stephen C. Goss, briefed the Board on the actuarial projections of the OASI and DI programs in a [public session](#). Two independent experts, Mark Warshawsky from the American Enterprise Institute and Monique Morrissey from the Economic Policy Institute, provided discussant remarks.

Additional Research Activities

Recommendations to RDRC and Office of the Inspector General

- *F7 – making recommendations with respect to a long-range research and program evaluation plan for the Administration*

The Board continues to offer suggestions to SSA as it develops its long-range research agenda. On December 16, 2020, the Board submitted research topics for the FY 22 Retirement and Disability Research Consortium (RDRC) to the Deputy Commissioner for Retirement and Disability Policy at SSA. The Board will examine how SSA conducts and uses research and data analytics to develop policy and better understand and implement improvements to its internal process and administrative initiatives.

In FY 20, the Board began providing recommendations to the Office of Inspector General (OIG) on audits to assist SSA in its program administration. On June 16, 2021, the Board submitted a series of audit recommendations to OIG.

Outreach and Public Education

- *F6 – increasing public understanding of the Social Security system*

In FY 20, the Board launched a newly redesigned website which meets federal accessibility standards. In FY 21, the Board continued to improve the website and comply with regulatory requirements. In the second quarter, the Board adopted *search.gov* created by the General Services Administration (GSA) and used by approximately one-third of federal domains. The search engine provides the public with a similar experience when interacting with different government websites. Additionally, because of its broad use, *search.gov* offers data analytics across domains providing insight into how people seek out information and search for resources, and why they went searching for the resources.

The Board will continue to share important public service information and Board work, including its publications, Board meeting minutes, and public event recordings via its website. In FY 21, the Board posted ten captioned videos of live public events. Additionally, the Board uses social media to reach a wider audience through its [Twitter](#) and [LinkedIn](#) accounts.² The transition of public events from in-person to virtual has led to a substantial increase in attendance of the Board's events by participants across the country. In FY 21, individuals from over 41 states attended Board-hosted events.

Governance

Annual Report Covering FY 2020

In March 2021, the Board published its [FY 20 Annual Report](#), summarizing the Board's work during FY 20 and providing detailed information regarding its accomplishments. The Report highlighted the Board's efforts to ensure the timely issuance of COVID relief payments and the delivery of vital Social

² In FY 21, @ssabgov tweets received 62, 506 impressions or the total tally of times the tweets had been seen.

Security services following the closing of field offices to protect the public and SSA employees. The report also summarized the Board's other projects that focused on ways to improve Social Security's disability programs, service delivery, information technology, and representative payee program.

Bob Joondeph Named SSAB Chair

On July 28, 2021, President Joe Biden [named](#) Bob Joondeph Chair of the Board. Joondeph replaced Kim Hildred, who was designated Chair by President Donald Trump in July 2017. We are grateful to Kim Hildred for her dedicated stewardship during her tenure as Chair.

Jagadeesh Gokhale Reappointed to a Third Term

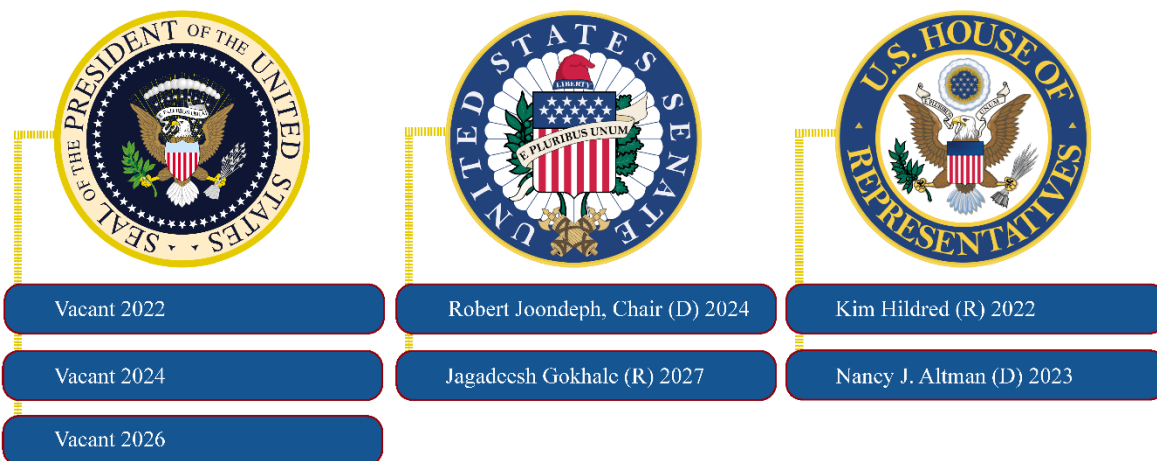
On September 30, 2021, Jagadeesh Gokhale was [reappointed](#) to serve a third term on the Social Security Advisory Board. Gokhale was initially appointed in November 2009 and reappointed in October 2015. Gokhale's current term expires in 2027.

FY 2021 Board Members

The Board may have as many as seven members; currently the Board has three open White House appointments. The Board's authorizing statute sets forth the appointment process:

- 3 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.
- 2 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.
- 2 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;



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. 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. 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.



Jagadeesh Gokhale, PhD, is Director of Special Projects at Penn 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 particular 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 the solvency of the Social Security trust funds. Dr. Gokhale is published in numerous professional journals and newspapers such as *The Wall Street Journal*, *The Financial Times*, *The Washington Post*, and *Forbes*. terms of office: First term: November 2009 to September 2015 Second term: October 2015 to September 2021. Third term: Gokhale was reappointed to a consecutive term in October 2021 to September 2027.



Kim Hildred currently serves as President of Hildred Consulting, LLC., and served as Chair of the Social Security Advisory Board from July 2017 until July 2021. In 2015, 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. Hildred has a Bachelor of Arts from Waynesburg University and a Master of Science in education from Duquesne University. Current term of office: September 2016 to September 2022.



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. 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* and *Social Security Works for Everyone! Protecting and Expanding the Insurance Americans Love and Count On*. 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.

Board Staff

Claire Green, Staff Director

Diane Brandt, Research Director

Sunny Bick, Management Analyst

Cheri Cannon, General Counsel

Pamela Crawford, Senior Advisor

Bethel Dejene, Management Officer

Conway Reinders, Lead Policy Analyst

Jenn Rigger, Senior Advisor

Omar Shalabi, Policy Analyst

Emma Tatem, Lead Policy Analyst

Student Interns

Mark A. Benavides, Summer Legal Associate

Brandon Easley, Communications Intern

Appendices

FY 2021 Board Meetings and Public Sessions

The Board's authorizing statute requires the Board to meet at least four times per year. However, the Board usually exceeds that amount and in FY 21 it held six two-day meetings, and a virtual public session on Social Security's financial outlook, supplemented with internal calls and Chair meetings. Due to ongoing pandemic concerns, all meetings in FY 21 were held virtually.

All public meeting minutes and videos are available on the Board's [website](#). The Board public sessions are listed here:

- [Long-Standing Dedicated Account Challenges](#) (November 19, 2021)
- [Historical Overview of Social Security's IT Systems](#) (January 28, 2021)
- [Presentation of IT Systems Expert Panel Final Report](#) (January 29, 2021)
- [Digital Identity](#) (March 26, 2021)
- [Social Security's Public Service](#) (May 20, 2021)
- [Modernizing Legacy IT Systems](#) (May 21, 2021)
- [Medical Evidence Collection](#) (July 29, 2021)
- [Customer Experience](#) (July 30, 2021)
- [Assessing Social Security's Financial Outlook](#) (September 3, 2021)
- [State Agencies' Role in Disability Determinations](#) (September 23, 2021)

November 19 – 20, 2020

On **November 19**, the Board met in executive session in the morning and held a roundtable discussion on "Reexamining Long-Standing SSI Dedicated Account Challenges" in the afternoon.

Public Session

- **Jo Anne Barnhart**, former Commissioner of Social Security, Social Security Administration (retired)
- **Gregory Brusik**, Vice President, National Council of Social Security Management Associations; District Manager, Bellingham, Washington Field Office, SSA
- **Taramattie Doucette**, Project Director, Children's Disability Project, Greater Boston Legal Services

- **Rachel Emmons**, Washington Representative, National Council of Social Security Management Associations Linda Landry, Senior Attorney, Disability Law Center – Massachusetts Protection and Advocacy
- **James J. Klein**, Director, San Francisco Audit Division, Office of the Inspector General, SSA
- **David Lescarini**, President, National Council of Social Security Management Associations; District Manager, McMinnville, Tennessee Field Office, SSA
- **Mary O'Connell**, Professor Emerita, Northeastern University School of Law (retired)

Executive Session

- **Dawn Wiggins**, Associate Commissioner, Office of Income Security Programs (OISP), Office of Retirement and Disability Policy (ORDP), SSA
- **Eric Ice**, Director, Office of Representative Payee & Due Process Policy, OISP, ORDP, SSA

Executive Session

- **Stephanie Hall**, Chief of Staff, Office of the Commissioner, SSA

On **November 20**, the Board met in executive session.

Executive Session

- **Marianna LaCanfora**, Deputy Commissioner, Office of Oversight Analytics and Review (OARO), SSA

Executive Session

- **Alan Balutis**, Chair, System Technical Panel

January 28 – 29, 2021

On **January 28**, the Board met in executive session in the morning. In the afternoon, in a public session, the Board hosted its first presenter in the systems speaker series to provide a historical overview of SSA's IT systems.

Executive Session

- **Dawn Wiggins**, Associate Commissioner, Office of Income Security Programs (OISP), Office of Retirement and Disability Policy (ORDP), SSA

Executive Session

- **Stephen Goss**, Chief Actuary, Office of the Chief Actuary (OCACT), SSA
- **Karen Glenn**, Deputy Chief Actuary, OCACT, SSA
- **Michael Stephens**, Supervisory Actuary, Short-Range Actuarial Estimates, OCACT, SSA

Public Session

- **Renny DiPentima**, former Deputy Commissioner of Systems, Office of Systems, SSA

On **January 29**, the Board hosted the IT Systems Expert Panel to present their report to the public and completed the day in executive session.

Public Session

- See Appendix B for panel members and the full report

Executive Session

- **Manasi Deshpande**, Assistant Professor of Economics, Kenneth C. Griffin Department of Economics, University of Chicago

March 25 – 26, 2021

On **March 25**, the Board met in executive session.

Executive Session

- **Kilolo Kijakazi**, Deputy Commissioner, Office of Retirement and Disability Policy (ORDP), SSA
- **Anya Olsen**, Deputy Director, Office of Research, Evaluation, and Statistics (ORES), ORDP, SSA

- **Darlynda Bogle**, Assistant Deputy Commissioner, Office of Communications (OCOMM), SSA
- **Maria Artista-Cuchna**, Deputy Associate Commissioner, Office of Public Inquiries and Communications Support, OCOMM, SSA
- **Eric D. Goodman**, Public Affairs Specialist, OCOMM, SSA
- **Bea Disman**, Senior Advisor to the Commissioner, SSA
- **Elizabeth Tino**, Senior Advisor, Office of the Commissioner, SSA

Executive Session

- **Matthew Weiner**, Vice Chairman, and Executive Director, Administrative Conference of the United States (ACUS)
- **Jeremy Graboyes**, Deputy Research Director, ACUS

Executive Session

- **Theresa Gruber**, Deputy Commissioner, Office of Hearings Operations (OHO), SSA
- **Joseph Lopez**, Associate Commissioner, Office of Electronic Services and Systems Integration, OHO, SSA
- **Joseph Lytle**, Assistant Deputy Commissioner, OHO, SSA
- **Sylviane Haldiman**, Assistant Deputy Commissioner, OHO, SSA
- **Yodit Ghebrekidan**, Executive Officer, OHO, SSA
- **Allison Page**, Senior Advisor, OHO, SSA
- **Elizabeth Tino**, Senior Advisor, SSA

Executive Session

- **Scott Frey**, Chief of Staff, Office of the Commissioner, SSA

On **March 26**, the Board met in executive session in the morning. In the afternoon, the Board hosted two presenters in the second systems speaker series with perspectives on the federal government's digital identity approach.

Executive Session

- **Greg Giddens**, Partner, Potomac Ridge Consulting
- **Jim Williams**, Partner, Schambach & Williams Consulting

Public Session

- **Phil Lam**, Executive Director of Identity, Technology Transformation Services, GSA
- **Blake Hall**, Founder & CEO, ID.me

May 20 – 21, 2021

On **May 20**, the Board met in executive session in the morning and hosted a roundtable discussion on "Social Security's Public Service" in an afternoon public session.

Executive Session

- **Scott Frey**, Chief of Staff, Social Security Administration (SSA)

Executive Session

- **Sean Brune**, Deputy Commissioner for Systems and Chief Information Officer, SSA
- **Alan Balutis**, Chair, SSAB Independent Systems Panel

Executive Session

- **Kim Baldwin-Sparks**, Chief Business Officer, SSA
- **Paul Funk**, Senior Advisor, SSA

Public Session

- **Stephen C. Goss**, Chief Actuary, SSA
- **Elizabeth H. Curda**, Director, Education, Workforce, and Income Security Team, Government Accountability Office (GAO)
- **Sarah S. Stith**, PhD, Assistant Professor, University of New Mexico
- **Amira C. Boland**, Lead, Federal Customer Experience, OMB
- **Kristen Dama**, Managing Attorney, SSI, and Medical-Legal Partnership, Community Legal Services of Philadelphia
- **Kate Lang**, Senior Counsel, Justice in Aging

- **David Lescarini**, President, National Council of Social Security Management Associations (NCSSMA); Field Office Manager, McMinnville, Tennessee, SSA
- **Bethany Lilly**, Director, Income Policy, The Arc
- **L. Scott Muller**, former Senior Economist, SSA (retired)
- **Peggy Murphy**, Immediate Past President, NCSSMA; Field Office Manager, Great Falls, Montana, SSA
- **Jody Schimmel Hyde**, PhD, Deputy Director, Mathematica Center for Studying Disability Policy
- **Purvi Sevak**, PhD, Principal Researcher, Mathematica
- **Nancy Y. Wong**, PhD, Kohl's Chair in Retail Innovation and Professor, University of Wisconsin – Madison
- **Erica H. Zielewski**, Senior Evidence Analyst, OMB

On **May 21**, the Board hosted its third systems speaker series on modernizing legacy IT systems and finished the afternoon in executive session.

Public Session

- **Robert Klopp**, Owner/Principal, Skyland Digital Services; former Deputy Commissioner for Systems and Chief Information Officer, SSA
- **Kevin C. Walsh**, Director of Information Technology and Cybersecurity, GAO

July 29 – 30, 2021

On **July 29**, the Board met in executive session in the morning and hosted a roundtable discussion on "Medical Evidence Collection" in the afternoon public session.

Executive Session

- **Bea Disman**, Senior Advisor to the Commissioner, SSA
- **Jeffrey Buckner**, Office of Communications, Associate Commissioner, Office of Strategic and Digital Communications, SSA
- **Raymond Egan**, Regional Commissioner for the New York Region, Office of Operations, SSA
- **Everett Lo**, Regional Communications Director for the New York Region, Office of Operations, SSA

- **Stephanie Hall**, Assistant Deputy Commissioner, Office of Operations, SSA
- **Samara Richardson**, Senior Advisor, Office of Operations, SSA
- **Elizabeth Tino**, Senior Advisor, Office of the Commissioner, SSA

Executive Session

- **Scott Frey**, Chief of Staff, SSA

Public Session

- **Marjorie Garcia**, President, National Association of Disability Examiners (NADE); Disability Analyst, Oregon DDS
- **Paul Kreger**, Medical Professional Relations Officer, Iowa DDS
- **Liz McLaren**, Administrator, Iowa DDS
- **Jennifer Nottingham**, Legislative Director, NADE; Operations Manager, Nevada DDS
- **Marjorie Portnoy**, Managing Partner, Portnoy Disability Practice in Radnor, Pennsylvania
- **Teresa Sizemore-Hernandez**, Professional Relations Team Leader, Virginia DDS
- **Melissa Spencer**, former Deputy Associate Commissioner, Office of Disability Policy, SSA (retired)
- **Sara Winn**, Immediate Past President, NADE; Program Specialist, Louisiana DDS

On **July 30**, the Board met in executive session in the morning. The Board hosted its fourth systems speaker series event on customer experience as a driver for modernizing IT in an afternoon public session.

Executive Session

- **Stephen C. Goss**, Chief Actuary, SSA

Public Session

- **Barbara C. Morton**, Deputy Chief Veterans Experience Officer, Veterans Experience Office, Department of Veterans Affairs

September 23 – 24, 2021

On **September 23**, the Board hosted two public sessions on "State Agencies' Role in Disability Determinations" as well as an executive session with the Commissioner of Social Security.

Executive Session

- **Kilolo Kijakazi**, Acting Commissioner of Social Security, SSA

Public Session

- **Art Spencer**, former Associate Commissioner, Office of Disability Programs, SSA
- **Melissa Spencer**, former Deputy Associate Commissioner, Office of Disability Policy, SSA

Public Session

- **Leon Scales**, President, National Council of Disability Determination Directors (NCDDD); Director, Virginia DDS
- **Jacki Russell**, Incoming President, NCDDD; Director, North Carolina DDS
- **Ian Harlow**, Board Member, NCDDD; Director, Pennsylvania DDS
- **Mary Wolfe**, Member, NCDDD; Administrator, Texas DDS

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

Executive Session

- **Stephen Evangelista**, Acting Deputy Commissioner, ORDP, SSA
- **Erik Jones**, Assistant Deputy Commissioner, Office of Operations, SSA
- **Dawn Wiggins**, Associate Commissioner, OISP, ORDP, SSA
- **Christopher McDermott**, Deputy Associate Commissioner, ORDP, Office of Data Exchange, Policy Publications, and International Negotiations, (ODEPPIN), SSA
- **Eric Ice**, Division Director, Office of Representative Payee and Due Process Policy, OISP, ORDP, SSA
- **John Morenz**, Associate Commissioner, ODEPPIN, ORDP, SSA

- **Vivian Adebayo**, Social Insurance Specialist, ODEPPIN, ORDP, SSA
- **Samara Richardson**, Senior Advisor, Office of Operations, SSA
- **TaMika Cleveland**, Senior Advisor, Office of Public Service and Operations Support (OPSOS), Office of Operations, SSA
- **Elizabeth Tino**, Senior Advisor, Office of the Commissioner, SSA

Executive Session

- **Paul D. Kelly**, Lead Social Insurance Specialist, ORDP, OISP, SSA
- **Robert Weathers**, ORDP, SSA
- **Susan Wilschke**, Chief Evaluation Officer; Acting Associate Commissioner, Office of Research, Demonstration, and Employment Support, ORDP, SSA
- **Elizabeth Tino**, Senior Advisor, Office of the Commissioner, SSA

IT Systems Expert Panel

The Board commissioned an independent IT Systems Expert Panel to assess Social Security's IT modernization. The panel issued this report:

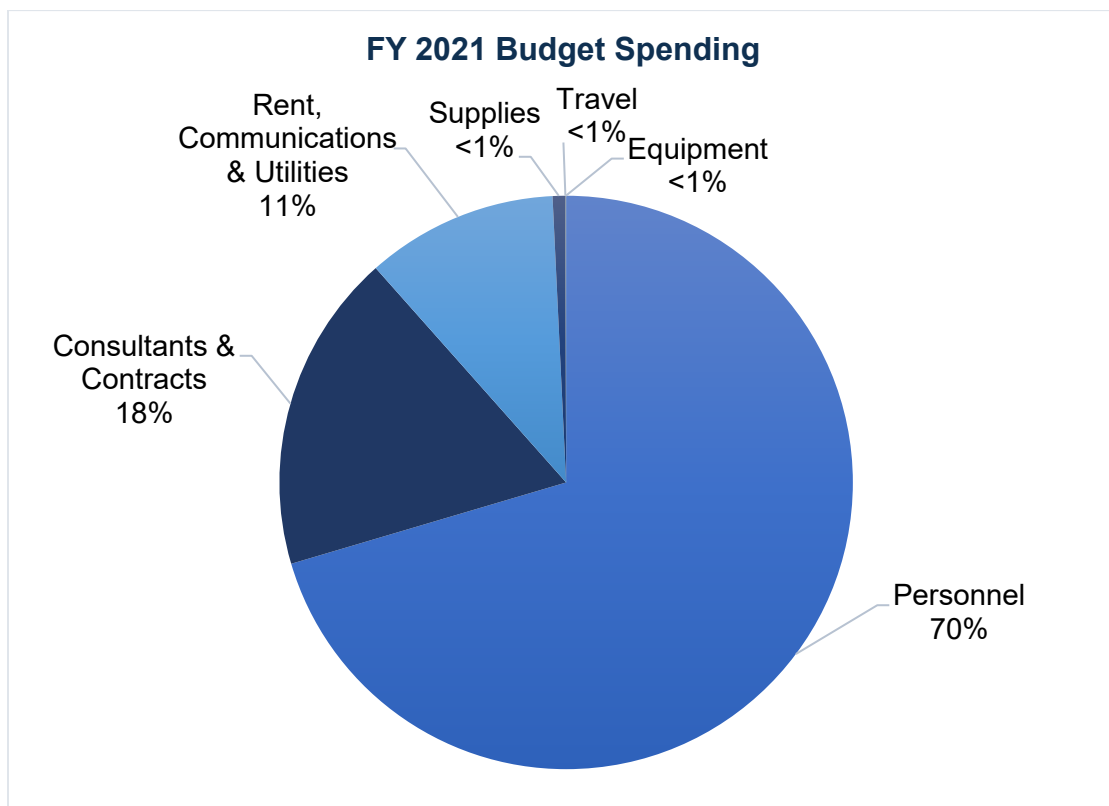
- [*Essential Changes Imperative for the Success of Social Security's IT Modernization and Future Operations*](#)

IT Systems Expert Panel Members

- **Alan Balutis**, Panel Chair, Senior Director of North American Public Sector Cisco Systems Business Solutions Group
- **Dan Chenok**, Executive Director, IBM Center for the Business of Government, and Chair of Homeland Security's Cybersecurity Subcommittee
- **Nani A. Coloretti**, Senior VP for Financial and Business Strategy, Urban Institute; former Deputy Secretary, US 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, General Services Administration

- **William D. Eggers**, Executive Director, Center for Government Insights, Deloitte
- **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 McClure**, Leader of Transformational IT Initiatives, Accenture Federal Services; former Cybersecurity Chief Strategist, Coalfire Federal/Veris Group
- **Jim Williams**, Partner, Schambach and Williams Consulting, LLC; former Administrator, GSA

SSAB Budget



FY 2021 Budget Expenditures

Object Class	Amount
Personnel	\$ 1,661,347
Consultants & Contracts	\$ 425,025
Rent, Communications & Utilities	\$ 254,858
Supplies	\$ 16,508
Travel	\$ 727
Equipment	\$ 630
Printing & Reproduction	\$ -
TOTAL	\$ 2,359,094

SSA included \$2.7 million for the Board in its FY 21 President's budget. The Board's final appropriated amount was \$2.5 million.

- Expenses reflect the status of funds for the end of the FY. Personnel includes Board and staff salary, benefits, and claims.
- Consultants and contracts category consists of IT/security contract, interagency/interpersonal agreements, experts, temporary help services, training, 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 local travel and transit benefits.
- Publications were not printed in FY 21.