

Social Security Advisory Board

Fiscal Year 2020 Annual Report

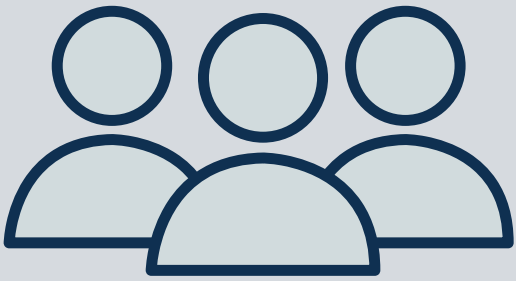
March 2021



SSAB SOCIAL SECURITY ADVISORY BOARD

FY 2020 by the Numbers

12 BOARD MEETINGS



7 PUBLISHED WORKS



Meetings with **96 SSA stakeholders**



81,415

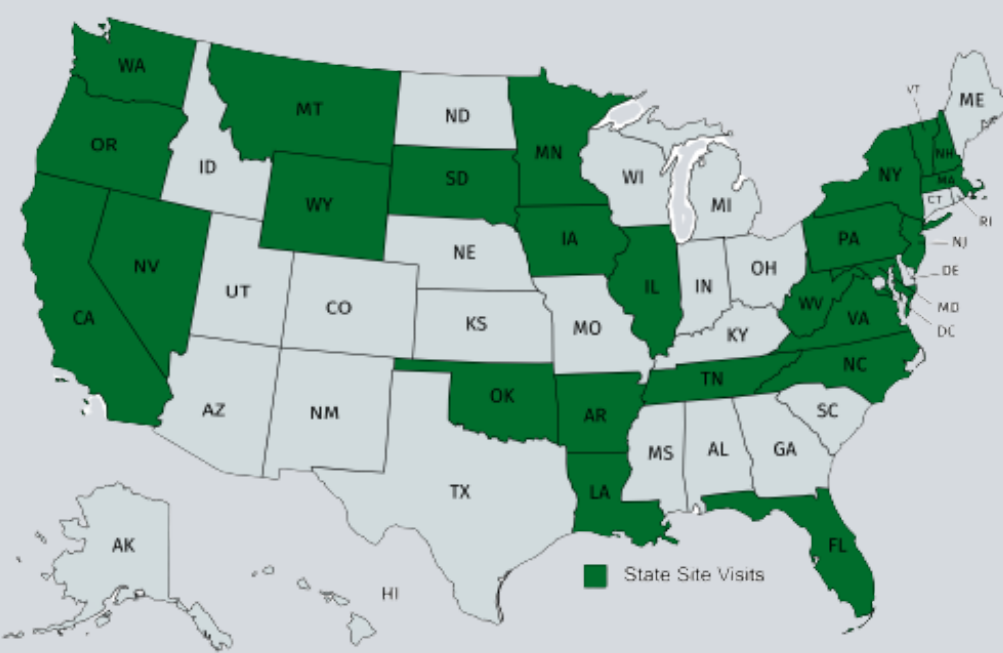
Impressions and **210** new Followers

IT SYSTEMS PANEL



18 meetings with **44** experts

VIRTUAL SITE VISITS



Meetings with representatives from SSA management associations and unions in 25 states in all of SSA's 10 regions.



270
VIRTUAL
REP-PAYEE FORUM
ATTENDEES

22K+



WEBSITE VISITS

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Acronyms

Social Security Advisory Board	Board
Social Security Administration	SSA
Supplemental Security Income	SSI
Representative Payee	Payee
Internal Revenue Service	IRS
Fiscal Year	FY

I. Message from the Chair

The bipartisan Social Security Advisory Board's ("Board") mission is to provide the President, Congress, and the Commissioner of Social Security, advice and guidance with respect to how the Social Security and Supplemental Security Income (SSI) programs, supported by other public and private systems, can most effectively assure economic security. This *Annual Report* summarizes the Board's work during fiscal year (FY) 2020 and provides detailed information regarding the Board's accomplishments. The following summarizes the Board's work during the year.

COVID-19

The COVID-19 pandemic refocused the Board's efforts beginning in March to moving to a telework environment and assessing the Social Security Administration's (SSA) response to COVID-19. In April, the Board sent two COVID-19-related letters to the Commissioner of Social Security, one urging action regarding COVID-19 relief payments and representative payee monitoring and the second urging the elimination of filing deadlines for COVID-19 relief payments to dependents. In subsequent months, the Board met employee and claimant representative organizations about the challenges faced, including service delivery impacts, systems issues hindering telework, workload management and prioritization issues, and concerns regarding workforce and operational stabilization. The Board also joined an information-sharing network to ensure policymakers and agency leadership were aware of and addressing critical issues.

Disability Programs

In response to a congressional request, the Board released an issue brief in April examining Social Security's decision to reinstate the reconsideration appeals step in the ten states participating in a Prototype pilot since 1999. The Board mentioned in its report that efforts to examine SSA's decision and justification to reinstate reconsideration were hampered by SSA's declination to provide available data to the Board. The report did note that a uniform national appeals process does not eliminate variability in state Disability Determination Services administration and policy interpretation. The brief included a list of research questions the Board believes should be answered through a rigorous, publicly available evaluation.

Service Delivery

In June the Board issued its report, *Decisions Regarding Field Office Closures*. In its conclusion, the Board urged Social Security to clarify its decision-making process, increase transparency, and involve the public in its deliberations about field office closures.

Representative Payees

On September 16th, the Board published an independent, Board-commissioned study, *Selection Processes for SSA Representative Payees of Adults*. The authors presented their report during the Board's virtual policy forum, Representative Payees: Opportunities to Improve Service Delivery, held September 24th. The researchers met with Social Security field office employees and collected input from a survey of Social Security field office managers. Their 35 recommendations were identified to improve Social Security's payee appointment and selection.

Information Technology Systems

In August 2019, the Board appointed an independent, expert panel to review Social Security's efforts to modernize its systems, which is essential to delivering effective service to the public and keeping information protected. During FY 2020, the Panel held 18 meetings with 44 experts. The Panel's final report was released during the first quarter of FY 2021.

Board Operations

In addition to transitioning to telework, the Board offices completed renovation, requiring extensive coordination with the General Services Administration, SSA, and building management. In response to government-wide system security requirements, the Board also entered an memorandum of understanding with the Department of Interior to create a system security plan and annual assessment schedule.

SSA continues to provide considerable support to the Board's operations, including a liaison in the Commissioner's Office, expertise from human resources, facilities management, telecommunications, budget, procurement, and contracting. We thank all SSA employees who work with the Board for their invaluable expert advice and support.

To ensure continuity of effective administrative operations, the Board is clarifying administrative supports and responsibilities between SSA and the

Board, seeking new approaches to meet support needs, and consulting with the Congress and the Office of Management and Budget for their feedback.

Lastly, I want to express our sincere thanks to Henry Aaron, whose term expired in September after six years of dedicated service to the Board, including three years as Chair. We also thank the Commissioner of Social Security, Andrew Saul; SSA employees; Congressional staff; and the many experts, advocates, and other stakeholders who provided their valuable expertise and insights in support of the Board's efforts. We also recognize and appreciate all of our staff's efforts to help us achieve our mission.

Kim Hildred

II. Fiscal Year 2020 Accomplishments

Board Publications

Along with the [2019 Annual Report](#), the Board also published:

Letter to Commissioner Urges Action Amid Coronavirus (COVID-19) Pandemic

On April 6, 2020, the Board sent a letter to the Commissioner of Social Security Andrew Saul acknowledging the agency's work during the pandemic and applauding his decision to expand telework. The Board then urged that Social Security ensure that those who receive Supplemental Security Income (SSI) also receive relief payments automatically and quickly, without filing any forms. The Board went on to question the agency's decision to suspend new payee reviews required by law. The Board encouraged SSA to work with the network of Protection and Advocacy organizations to maintain operational capabilities and continue payee reviews. Read the [letter](#).

Letter to Commissioner Urges Eliminating Filing Deadlines for COVID-19 Dependent Payments

On April 28, 2020, the Board wrote to Commissioner Saul and copied Secretary of Treasury Stephen Mnuchin. The Board acknowledged SSA's work in assisting the Department of Treasury to assure COVID-19 relief payments were made to Social Security beneficiaries and SSI recipients. However, the Board raised concerns about the short deadline for families to complete the online form to receive eligible dependents' payments. The Board noted that many people receiving Social Security and SSI benefits might not learn about the filing requirements. Even if they did find out, many people with limited access to computers and the internet might have trouble complying. Additionally, the Board noted concerns had been raised regarding the accessibility of the Internal Revenue Service (IRS) portal. The Board urged SSA to work with Treasury to eliminate the filing deadlines for Social Security beneficiaries and SSI recipients. Read the [letter](#).

Brief Examines Social Security's Decision to Reinstate Reconsideration Appeal

Also, in April, and in response to a request from the Chair and Ranking Member of the US House of Representatives Committee on Ways and Means Social Security Subcommittee, the Board released an issue brief examining Social Security's decision to reinstate the reconsideration level of the disability administrative appeals process in the ten states that had been piloting removal of the step since 1999. In these prototype states, a claimant dissatisfied with

the initial disability determination could request a hearing before an administrative law judge instead of having their disability claim reviewed by a second state disability examiner.

The Board noted in its report that efforts to examine SSA's decision and justification to reinstate reconsideration were hampered by SSA's declination to provide available data to the Board. The report did note that a uniform national appeals process does not eliminate variability in policy interpretation by the state agencies. The Board included a list of research questions which the Board believes should be answered through a data-driven approach and publicly available evaluation. Read the [brief](#).

Report Urges More Transparency and Better Use of Evidence in Decisions to Close Social Security Field Offices

In June, the Board published a preface to the series of work on Social Security's Service to the public and a report on field office closures. The Board urged more transparency in closure decisions and better use of evidence-based decision making. The report addressed the implications of Social Security's decisions in the context of recent research analyzing the impact of field office closures on the quality of and public's access to Social Security's services. The paper concluded with the Board urging Social Security to initiate a data-driven and evidence-based approach to monitor the quality and accessibility of services provided (whether in-person, on the phone, or online) and also, to consider the effect of changes across population groups, especially the most vulnerable. Finally, the Board encouraged SSA to engage the public when evaluating changes to service delivery. Read the [report](#).

Member Submits Individual Statement on the SSI Program

The Personal Responsibility and Work Opportunity Reconciliation Act of 1996 (Public Law 104-193) gave members of the Board, either individually or jointly, the opportunity to include their views on the SSI program in Social Security's annual report to the President and the Congress.

In 2020, Board member Nancy Altman issued an individual statement on the SSI program. The statement focused on Altman's belief that there is a pressing need to update, expand and simplify the SSI program. Altman noted that although numerous experts and entities had urged Congress to simplify SSI, the program remains complicated and expensive to administer. Altman further stated that if SSA chose, it could simplify program administration without the need for legislation. She noted that SSA spends almost as much to

administer SSI as it does to administer Social Security, even though SSI accounts for just five percent of the benefits paid by SSA, while Social Security accounts for 95 percent. Read the [statement](#).

Board Commissioned Work

Independent Report Reviews Selection Process for Representative Payees of Adults

The Board commissioned a study on Social Security's process of selecting payees for adults. The Board's goal in funding the research was to get a better understanding of how field offices interpret policy and manage the payee workload, with an aim towards helping policymakers in determining ways to strengthen the administration when payees for adults are required. The study was conducted by Pamela Teaster (Virginia Tech), Laura Sands (Virginia Tech), and Erica Wood (American Bar Association). The research used a two-phase process of in-person interviews and a national survey of field office managers.

The final report described current practices in the payee selection process and found inconsistencies in how capability was determined, and payees selected. The report's 35 recommendations address many aspects of payee appointment and selection currently undertaken by SSA, including specific changes in policy, guidance, administration, communications, forms, technology, training, and research. In addition to presenting report findings at a public forum, the Board and researchers met with the Social Security office in charge of payee policy to outline the report findings. Read the full [paper](#).

Board Hosts Forum on Opportunities to Improve Representative Payee Service Delivery

On September 24, 2020, the Board held a virtual policy forum to showcase the Board-commissioned study on payees. Following the report presentation, the forum included three panels covering capability determinations, the payee selection process, training, oversight, and the need for ongoing research and evaluation. The final Panel also discussed the public service implications of a more individualized, supported decision-making model and how to get there. Review the [agenda](#).

Board Appoints Independent Information Technology Systems Expert Panel

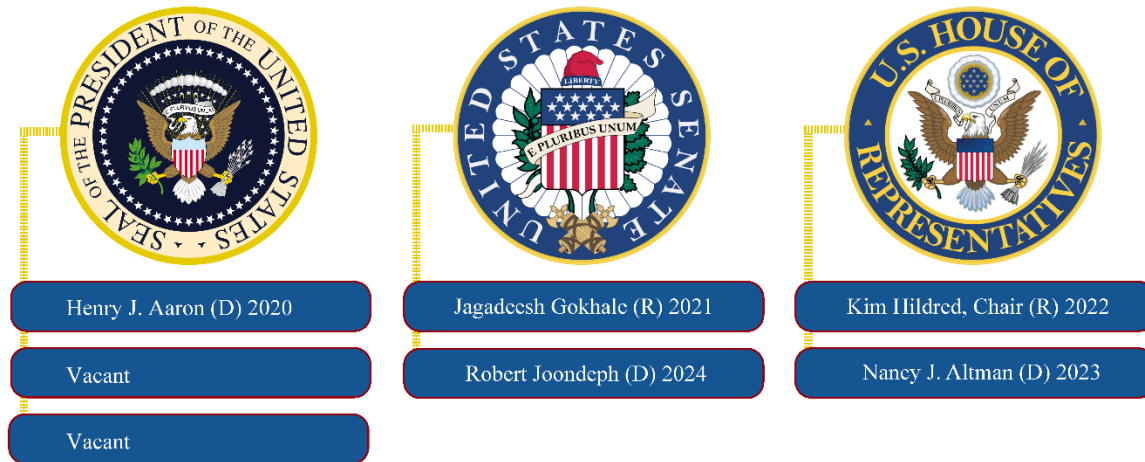
At the end of FY 2019, the Board appointed an independent panel of experts to evaluate and review Social Security's five-year, \$691 million IT Modernization Plan. Panel members comprised experts from across government and private industry, spanning multiple areas of expertise. The Panel met regularly throughout FY 2020, with multiple stakeholders, area experts, and Social Security Administration leadership and other employees. Stakeholders included SSA leadership and employees providing direct services to the public, IT experts from industry and other federal agencies, state Disability Determination Service management and employees, and advocacy groups. In addition to learning from the various stakeholder groups, the Panel examined SSA's modernization initiatives. This included evaluation of SSA's original [IT Modernization Plan](#) (released in October 2017) and its [IT Modernization Plan, 2020 Update](#) (released in June 2020). They reviewed the development, transformation, and modernization progress of SSA's IT systems, customer experience, and service delivery processes – as affected by the agency's IT modernization efforts. The Panel's final report was released during the first quarter of FY 2021. Please see Appendix B for a list of Panelists.

III. Fiscal Year 2020 Board Members

The Board is a bipartisan, independent federal agency established in 1994 to advise the President, the Congress, and the Commissioner of Social Security on matters of policy and administration of the Social Security and SSI programs. Board members are chosen based on their integrity, impartiality, and good judgment and are, because of their education, experience, and attainments, exceptionally qualified to perform the duties of members of the Board (42 U.S.C. 903 (c) (2)).

The Board has seven members, appointed to staggered six-year terms, with three appointed by the President, by and with the advice and consent of the Senate, two appointed by the President pro tempore of the Senate with the advice of the Chairman and the Ranking Minority Member of the Senate Committee on Finance, and two appointed by the Speaker of the House of Representatives, with the advice of the Chairman and the Ranking Minority Member of the House Committee on Ways and Means. The President designates one member of the Board to serve as Chair for a four-year term, coincident with the term of the President.

Figure 1. Board Member Appointments and Vacancies



Current Board Members



Kim Hildred currently serves as President of Hildred Consulting, LLC, and Chair of the Social Security Advisory Board. 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 degree from Waynesburg University and a Master of Science in Education degree from Duquesne University. Current term of office: September 2016 to September 2022.



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

Dr. Aaron was a founding member, Vice-President, and Board Chair of the National Academy of Social Insurance. Aaron received a BA from UCLA in political science and economics, an MA in Russia regional studies, and a PhD in economics from Harvard University.

Aaron's term began in September 2014 and ended on September 30, 2020.



Jagadeesh Gokhale, PhD is the Director of Special Projects at the Penn Wharton ("Wharton") Budget Model. Prior to joining Wharton, Dr. Gokhale was a Senior Fellow at the Cato Institute. An economist by training, Gokhale's main research fields are macro and public economics with a special focus on the effects of fiscal policy on future generations. Dr. Gokhale has written extensively on policy issues including Social Security and Medicare reform, national saving, private insurance, financial planning, wealth inequality, generational accounting, and

public intergenerational transfers; he has testified before Congress several times on these topics. In 2010 Gokhale published *Social Security: A Fresh Look at Policy Alternatives*, which constructs a different method for determining solvency of the Social Security trust funds. Dr. Gokhale is published in numerous professional journals, as well as newspapers such as the *Wall Street Journal*, *The Financial Times*, *The Washington Post*, and *Forbes*. Current term of office: October 2015 to September 2021.



Nancy J. Altman, JD has a forty-five-year background in Social Security and private pensions. Currently, Altman is President of Social Security Works, and Chair of the Strengthen Social Security Coalition. 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.



Bob Joondeph, JD served as the Executive Director of Disability Rights Oregon for over 30 years, promoting and defending the legal and civil rights of Oregonians with disabilities through legal-based advocacy. 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.

Nominees

President Trump first nominated Michael Astrue and Jason Fichtner on August 28, 2018. The nominations were returned at the end of the session. President Trump renominated Michael Astrue and Jason Fichtner on January 16, 2019. Michael Astrue withdrew his nomination on September 9, 2019. Jason Fichtner was approved by the Senate Finance Committee on March 11, 2020, however his nomination was not taken up by the full Senate before the end of the session.

In Memoriam

The Board paid tribute to two of its former Members who passed during the FY. Dorcas Hardy, the first woman Commissioner of Social Security passed away on November 28, 2019, having served more than 14 years on the Board. Dorcas was a strong advocate of meeting with SSA and DDS employees, urging the Board to address why action needed to be taken soon to address Social Security's financing challenges, and monitoring SSA's systems and IT modernization.

Stan Ross, former Commissioner and first confirmed Board Chair passed away on August 26, 2020. During his tenure as Board Chair, the Board released reports recommending improvements in fundamental areas of public administration, service delivery, and disability programs, along with options to achieve long-term balance of Social Security's long-term finances. Under Stan's leadership, the Board convened its first independent technical Panel to review the assumptions and methods used to generate the Trustees annual projections of Social Security financing, a practice that is continued by the Board every four years to this day.

IV. The Social Security Advisory Board Staff

Management

Claire Green, Staff Director
Diane Brandt, Research Director

Management Officer

Bethel Dejene

Senior Advisors

Pamela Crawford
Joel Feinleib
Anita Grant
Jenn Rigger

Lead Policy Analysts

Conway Reinders
Emma Tatem

Management Analyst

Sunny Bick

Policy Analysts

Mayana Bonapart
Lorena Hernandez

Interns and Fellows

Lillie Heigl
Omar Shalabi*
Allison Thomas

*promoted to Policy Analyst April 2020.

Appendices

A. FY 20 Board Meetings

All public meeting minutes are available on our website, www.ssab.gov.

November 21 – 22, 2019

On November 21, the Board hosted a roundtable discussion on "Evidence-Based Decision Making" in public session followed by a Board executive session. On November 22, the Board met in executive session.

- **Andrew Saul**, Commissioner of Social Security, SSA
- **David Black**, Deputy Commissioner of Social Security, SSA
- **Lisa Ekman**, Director of Government Relations, National Organization of Social Security Representatives (NOSSCR); Member, Working Group on Disability Insurance, Bipartisan Policy Center (BPC)
- **Howard Goldman**, Professor of Psychiatry, University of Maryland School of Medicine; Institute of Medicine Liaison, Committee on Psychological Testing, Including Validity Testing, National Academy of Sciences
- **Philip Litteral**, Immediate Past President and Legislative Affairs Liaison, National Association of Disability Representatives (NADR)
- **Judith Green McKenzie**, Professor, Division Chief, and Residency Program Director, Division of Occupational Medicine, Department of Emergency Medicine, University of Pennsylvania Perelman School of Medicine; Member, Committee on Functional Assessment of Adults with Disabilities, National Academy of Sciences
- **L. Scott Muller**, former Senior Economist, Office of Research, Evaluation and Statistics, Social Security Administration (SSA) (*retired*)
- **Leon Scales**, President-Elect, National Council of Disability Determination Directors (NCDDD); Director, Virginia Disability Determination Services (DDS)
- **Glenn Sklar**, former SSA executive in the policy and hearings level components
- **Melissa Spencer**, Assistant Associate Commissioner for Disability Policy, SSA (*retired*)
- **Sara Winn**, President, National Association of Disability Examiners (NADE); Disability Examiner, Louisiana DDS

January 30 – 31, 2020

On January 30, the Board hosted a roundtable discussion on "The Claimant Experience in Social Security's Disability Process" in public session. On January 31, the Board met in executive session.

- **Annie Almog**, Program Analyst, Office of Electronic Services and Technology, Division of Programmatic Applications, Leads & Intake Team, SSA
- **April Bass**, Division Director, DDS Automation Support, Office of Disability Determinations, Office of Operations, SSA
- **Renita Mackall**, Team Leader, Office of Electronic Services and Technology, Division of Programmatic Applications, Leads & Intake Team, SSA
- **Rachel Emmons**, Government Relations and Public Affairs Specialist, Greystone Group LLC (*representing the National Council of Social Security Management Associations*)
- **Christopher Mazzulli**, President, Disability Support Services, Inc; Elected Officer, NADR
- **Ashley Moore**, Associate Director of Care Management, Bread for the City; State Lead, SSI/SSDI Outreach, Access, and Recovery (SOAR)
- **Peggy Murphy**, President, National Council of Social Security Management Associations (NCCSMA); Manager, Great Falls, Montana Field Office
- **Alan Polonsky**, President NOSSCR; partner, Polonsky & Polonsky
- **Samara Richardson**, Acting Deputy Associate Commissioner, Office of Public Service and Operations Support, SSA
- **Susan Robertson**, Senior Staff Occupational Therapist and Mental Health Specialist in Occupational Therapy, National Institutes of Health Clinical Center
- **Leon Scales**, President-Elect, NCDDD; Director, Virginia DDS
- **Henry Shoemaker**, Team Leader, eCAT and Training Team, Division of DDS Automation Support, Office of Disability Determinations, Office of Operations, SSA
- **Megan Stanley**, Director, Commission on Human Relations, City of Pittsburgh
- **Dinah Tysinger**, Team Leader, Division of Analysis and Program Support, Office of Public Service and Operations Support, Office of Operations, SSA

- **Martha Dorris**, Director, World Information Technology and Services Alliance Board; Former Deputy Associate Administrator, Office of Citizen Services and Innovative Technologies, GSA
- **Greg Giddens**, Partner, Potomac Ridge Consulting; Chief Acquisition Officer, Partnership for Public Service

March 26 – 27, 2020

Due to the COVID-19 pandemic, the roundtable on "Rethinking the Disability Determination Process" originally scheduled for the March Board meeting was postponed. The Board held virtual meetings in executive session.

- **Michelle King**, Deputy Commissioner, Office of Budget, Finance, and Management, SSA
- **Stacy Braverman Cloyd**, Deputy Director of Government Affairs, NOSSCR
- **Peggy Murphy**, President, NCSSMA; Manager, Great Falls, Montana Field Office
- **Liz McLaren**, President, NCDDD; Director, Iowa DDS
- **Leon Scales**, President-Elect, NCDDD; Director, Virginia DDS
- **Jennifer Nottingham**, Legislative Director, NADE; Operations Manager, Nevada DDS
- **Melissa Spencer**, Assistant Associate Commissioner for Disability Policy, SSA (*retired*)
- **Art Spencer**, retired SSA executives with prior DDS experience
- **Curt Decker**, Director, National Disability Rights Network (NDRN)
- **Zach Martin**, Deputy Executive Director of Special Projects, NDRN
- **Steve Goss**, Chief Actuary, Office of the Chief Actuary, SSA
- **Howard Goldman**, MD, PhD, Chair, Engineering and Medicine Standing Committee of Medical and Vocational Experts for the Social Security Administration's Disability Programs, National Academies of Sciences

May 28 – 29, 2020

On May 28, the Board hosted a virtual roundtable discussion on "Testing and Evaluating Proposed Improvements to Initial and Reconsideration Level Disability Determinations" in public session. On May 29, the Board met in executive session.

- **David Autor**, Ford Professor of Economics, MIT
- **Chantel Boyens**, Principal Policy Associate, Urban Institute

- **Manasi Deshpande**, Assistant Professor in Economics, University of Chicago
- **Howard Goldman**, Professor of Psychiatry, University of Maryland School of Medicine
- **Nicole Maestas**, Associate Professor of Health Care Policy, Department of Health Care Policy, Harvard Medical School
- **Scott Muller**, Senior Economist, Office of Research, Evaluation, and Statistics, SSA (*retired*)
- **Harold Pollack**, Helen Ross Professor, School of Social Service Administration, University of Chicago
- **Jack Smalligan**, Senior Policy Fellow, Urban Institute
- **Art Spencer**, Associate Commissioner for Disability Programs, SSA (*retired*)
- **Melissa Spencer**, Deputy Associate Commissioner, Office of Disability Policy, SSA (*retired*)
- **David Stapleton**, Member, Treehouse Economics LLC

July 30 – 31, 2020

July Board meeting was held in virtual executive session.

- **Liz McLaren**, President, NCDDD; Director, Iowa DDS
- **Leon Scales**, President-Elect, NCDDD; Director, Virginia DDS
- **Frank Gilbertson**, Member, NCDDD; Director, Minnesota DDS
- **Trudy Lyon-Hart**, Board Member and Policy and Quality Committee Chair, NCDDD; Director, Vermont DDS
- **Joanna Fischer**, Board Secretary, NCDDD; Director, South Dakota DDS
- **Jeff Graham**, Member, NCDDD; Director, Wyoming DDS
- **Caroline Stout**, New York Regional Representative, NCDDD; Director, New Jersey DDS
- **Peggy Murphy**, President, NCSSMA; Field Office Manager, Great Falls, Montana
- **Rachel Emmons**, Washington Representative, NCSSMA
- **David Lescarini**, Vice President, NCSSMA; Field Office Manager, McMinnville, Tennessee
- **Joe Deaton**, Executive Officer, NCSSMA; Field Office Manager, Hot Springs, Arkansas
- **Christopher Detzler**, Immediate Past President, NCSSMA; Field Office Manager, Vancouver, Washington

- **Sarah Arnold**, San Francisco Region President, NCSSMA; Field Office Manager, Bakersfield, California
- **Justin Groshon**, Boston Region President, NCSSMA; Field Office Manager, Saco, Maine
- **James Sandoval**, Dallas Region President, NCSSMA; Field Office Manager, Rio Rancho, New Mexico
- **Brian Walker**, Atlanta Region Management Association President, NCSSMA; Field Office District Manager, Salisbury, North Carolina
- **Angela Hubbard**, New England Region Acting President, NCSSMA; Field Office Assistant District Manager, Manchester, New Hampshire
- **Rich Couture**, President, Council 215, American Federation of Government Employees (AFGE); Senior Attorney, Office of Hearings Operations, SSA
- **Agatha Joseph**, President, Council 109, AFGE; SSA Payment Center
- **Earl Tucker**, President, Council 224, AFGE; SSA Field Assessment
- **Ralph DeJuliis**, President, Council 220, AFGE; SSA Office of Field Operations
- **Barri Sue Bryant**, President, Local 2809, AFGE; SSA Payment Center, Wilkes-Barre, Pennsylvania
- **Shelley Washington**, Executive Vice President, Local 1923, AFGE; Social Security Headquarters, Baltimore, Maryland
- **Sarah Winn**, President, NADE; Program Specialist, Louisiana DDS
- **Marjorie Garcia**, President-Elect, NADE; Salem, Oregon DDS
- **Jennifer Nottingham**, Legislative Director, NADE; Operations Manager, Las Vegas, Nevada DDS
- **Stephen Goss**, Chief Actuary, Office of the Chief Actuary, SSA
- **Alan Balutis**, Chair, IT Systems Expert Panel; Senior Director and Distinguished Fellow, U.S. Public Sector, Cisco Systems
- **Chad Bungard**, Chief of Staff, Office of Inspector General (OIG), SSA
- **Walt Bayer**, Congressional and Intragovernmental Liaison, OIG, SSA
- **Ranju Shrestha**, Legislative Counsel, OIG, SSA
- **Michelle Anderson**, Assistant Inspector General for Audit, OIG, SSA
- **Rona Lawson**, Senior Advisor, Office of Audit, OIG, SSA
- **Melissa McIntosh**, President, International Federation of Professional & Technical Engineers, Association of Administrative Law Judges; Administrative Law Judge, Office of Hearings Operations, SSA
- **Christie Saunders**, President, National Treasury Employees Union (NTEU); Senior Attorney, Office of Hearings Operations, SSA

- **Lyllian Simins**, Vice President at Large, NTEU; Senior Attorney, New York Office of Hearings Operations, SSA (Region II New York)

September 24 – 25, 2020

On September 24, the Board hosted a virtual Policy Forum on "Representative Payees: Opportunities to Improve Service Delivery" in public session. On September 25, the Board met in executive session.

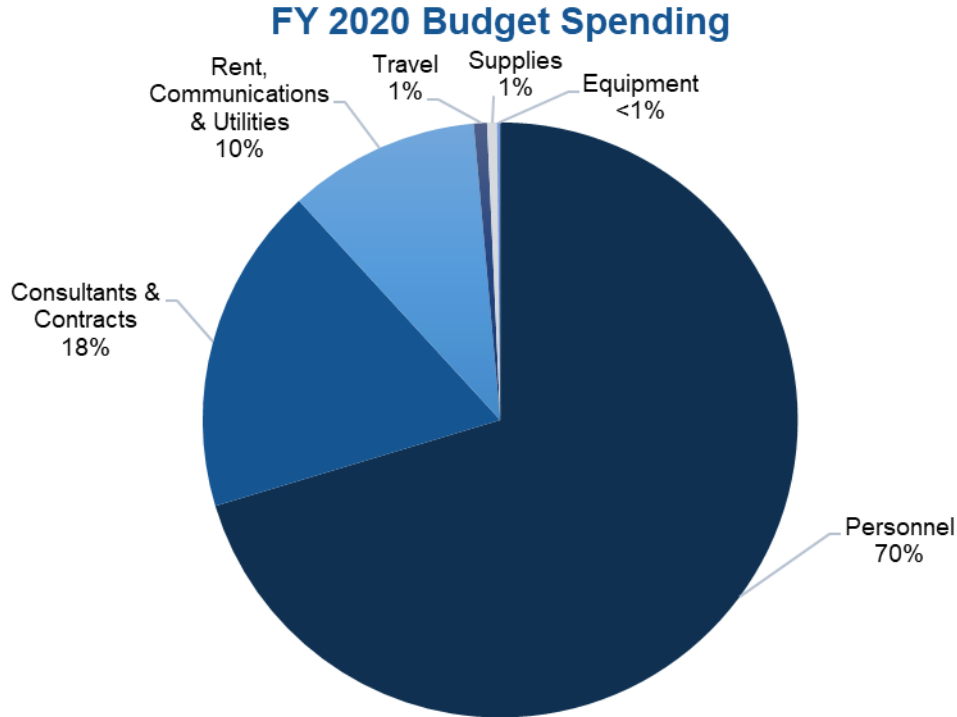
- **Laura Sands**, Professor of Human Development and Family Science, Virginia Tech
- **Pamela Teaster**, Director, Center for Gerontology and Professor of Human Development and Family Science, Virginia Tech
- **Erica Wood**, Assistant Director, Commission on Law and Aging, American Bar Association (*retired*)
- **J. Michael Collins**, Faculty Director, Center for Financial Security and Fetzer Family Chair on Consumer and Personal Finance, University of Wisconsin – Madison
- **Elizabeth Curda**, Director, Education, Workforce, and Income Security, Government Accountability Office (GAO)
- **Kate Lang**, Senior Staff Attorney, Justice in Aging
- **Linda Rutland**, Assistant Director, Pension and Fiduciary Service, Veterans Benefits Administration, Department of Veterans Affairs
- **Christopher Detzler**, Executive Officer, NCSSMA; District Manager, Vancouver, Washington Field Office, SSA
- **David Lescarini**, President, NCSSMA; District Manager, McMinnville, Tennessee Field Office, SSA
- **The Honorable Kristin Booth Glen**, Project Director, Supported Decision-Making New York; Dean Emerita, City University of New York School of Law
- **Reeve Bull**, Research Director, Administrative Conference of the United States (ACUS)
- **Curtis Decker**, Executive Director, NDRN
- **Ed Doonan**, Chairman of the Board, National Association of Organizational Representative Payees; Government Affairs Liaison, Benefits Management Corporation
- **Kate Lang**, Senior Staff Attorney, Justice in Aging
- **Kathryn Larin**, Director, Education, Workforce, and Income Security, GAO

- **Kenneth Apfel**, Professor of the Practice, University of Maryland School of Public Policy; former Commissioner of Social Security, SSA
- **Louis Enoff**, former Acting Commissioner of Social Security, SSA (*retired*)
- **Ari Ne'eman**, PhD Candidate in Health Policy, Harvard University
- **Morgan Whitlatch**, Legal Director, Quality Trust for Individuals with Disabilities; Lead Project Manager, National Resource Center for Supported Decision-Making
- **Hilary Dalin**, Director, Office of Elder Justice and Adult Protective Services, Administration for Community Living, Department of Health and Human Services
- **Matthew Weiner**, Vice Chairman and Executive Director, ACUS
- **Mark Thomson**, Deputy Director of Research, ACUS
- **Andrew Saul**, Commissioner, SSA
- **David Black**, Deputy Commissioner, SSA
- **Stephanie Hall**, Chief of Staff, Office of the Commissioner, SSA
- **Rajive Majur**, Deputy Commissioner and Chief Information Officer, Office of Systems, SSA
- **Sean Brune**, Assistant Deputy Commissioner and Deputy Chief Information Officer for IT Modernization, Office of Systems, SSA

B. Information Technology Systems Expert Panel

- **Alan Balutis**, Panel Chair, Senior Director, North American Public Sector Cisco Systems Business Solutions Group
- **Dan Chenok**, Executive Director, Center for the Business of Government, IBM; Chair, Cybersecurity Subcommittee, Homeland Security
- **Nani A. Coloretti**, Senior Vice President, Financial and Business Strategy, Urban Institute; Deputy Secretary, US Department of Housing and Urban Development (*formerly*)
- **Renato A DiPentima**, Former Deputy Commissioner and CIO of Social Security Administration. Currently serves on the Board of Directors of Cap Gemini Government Solutions, as well as numerous other Boards.
- **Martha Dorris**, Director, World Information Technology and Services Alliance Board; Deputy Associate Administrator, Office of Citizen Services and Innovative Technologies, GSA (*formerly*)
- **William D. Eggers**, Executive Director, Center for Government Insights, Deloitte
- **Mark Alan Forman**, Vice President, Digital Government, Unisys Federal Systems; US Senate Committee on Governmental Affairs (*formerly*)
- **Greg Giddens**, Partner, Potomac Ridge Consulting; Chief Acquisition Officer, Partnership for Public Service
- **Dave McClure**, Leader of Transformational IT Initiatives, Accenture Federal Services; Cybersecurity Chief Strategist, Coalfire Federal/Veris Group (*formerly*)
- **Jim Williams**, Partner, Schambach and Williams Consulting, LLC; Administrator, GSA (*formerly*)

C. SSAB Budget



FY 2020 Budget Expenditures

Object Class	Amount
Personnel	\$ 1,721,700
Consultants & Contracts	\$ 436,800
Rent, Communications & Utilities	\$ 254,400
Travel	\$ 17,600
Printing & Reproduction	\$ -
Supplies	\$ 13,000
Equipment	\$ 4,300
TOTAL	\$ 2,447,800

*SSA included \$2.4 million for the Board in its FY 20 President's budget. The Board's final appropriated amount was \$2.5 million. Expenses reflect status of funds at the end of the FY. Personnel includes Board and staff salary and benefits. Travel covers transportation expenses associated with Board meetings, conferences, events, local travel, and transit benefits. Expenses in the rent and communications category include rent, personal devices, and courier services. Publications were not printed in FY 2020. Consultants and contracts category consists of IT/security contract, interagency services, trainings, conferences, facility and security services. Supplies and equipment include office supplies and subscriptions as well as IT and office equipment.

D. Legislation Establishing the Board

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

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

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;

1. Studying and making recommendations relating to the coordination of programs that provide health security with programs described in paragraph (1);
2. 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;
3. Making recommendations with respect to the quality of service that the Administration provides to the public;
4. Making recommendations with respect to policies and regulations regarding the old-age, survivors, and disability insurance program and the supplemental security income program;
5. Increasing public understanding of the social security system;
6. Making recommendations with respect to a long-range research program and evaluation plan for the Administration;
7. Reviewing and assessing any major studies of social security as may come to the attention of the Board; and
8. Making recommendations with respect to such other matters as the Board determines to be appropriate.