

**Social Security Advisory Board
Minutes
Board Meeting
December 10, 2015**

Location: 400 Virginia Avenue, S.W., Suite 625
Washington, D.C. 20024

Time: 9 a.m. – 4:30 p.m.

SSAB Members: Henry Aaron, Chair
Lanhee Chen
Alan Cohen
Bernadette Franks-Ongoy
Jagadeesh Gokhale
Dorcas Hardy
Barbara Kennelly

Presenters: **Jim Klein**, Director, San Francisco Audit Division, SSA Office of the Inspector General
Rona Lawson, Deputy Assistant Inspector General for Audit, SSA
Kathleen McManaman, Assistant Director, Pension and Fiduciary Service, Veterans Benefits Administration, U.S. Department of Veterans Affairs
Nancy Berryhill, Deputy Commissioner, Operations, SSA
Ann Robert, Associate Commissioner, Office of Disability Determinations, SSA
Rosemary Stricks, Associate Commissioner, Office of Public Service and Operations Support, SSA
Elaine Garrison-Daniels, Acting Deputy Associate Commissioner, Office of Public Service and Operations Support, SSA
Cynthia Bennett, Acting Associate Commissioner, Office of Telephone Services, SSA
Erik Jones, Assistant Deputy Commissioner, Operations, SSA
Robin Sabatino, Associate Commissioner, Office of Electronic Services and Technology, SSA

SSAB Staff: Claire Green, Staff Director
Jackie Chapin, Policy Chief
Jeremy Elder, Policy Analyst
Joel Feinleib, Staff Economist
Anita Kelly, Communications Director
Sterling Laudon, Policy Attorney
Jenn Rigger, Senior Advisor
Caitlyn Tateishi, Policy Analyst

David Warner, Management Chief
Sarah Weaver, Management Analyst
Hong Han, Research Analyst
Matthew Graves, Research Consultant

In December, the Board held a series of meetings, focusing on representative payees and operations at the Social Security Administration (SSA). In the morning, the Board met with Rona Lawson, Deputy Assistant Inspector General for Audit, and Jim Klein, Director for the San Francisco Audit Division. Ms. Lawson and Mr. Klein reviewed SSA's techniques for reviewing representative payees and spoke to some of the challenges of overseeing these individuals and organizations. Both suggested steps SSA could take to improve its oversight capabilities.

The Board next met with Kathleen McManaman, Assistant Director for the Pension and Fiduciary Service at the Veterans Benefits Administration (VBA). Ms. McManaman spoke about the VBA's Fiduciary Program, explaining the similarities and differences between it and SSA's representative payee program. Ms. McManaman described challenges of overseeing the Fiduciary Program and steps the VBA has taken to confront them. The Board discussed ways that SSA could collaborate with the VBA to prevent misuse of funds.

In the afternoon, the Board met with Nancy Berryhill, Deputy Commissioner for Operations, and other SSA Operations staff. The Operations team provided an overview of accomplishments for fiscal year 2015, with updates on SSA's public service performance. Initiatives included new online services and plans to handle agency workloads. The Board and Operations team discussed recent legislative changes and plans for implementation.

I certify that the minutes written for the December 10, 2015 meeting of the Social Security Advisory Board are correct.



Henry J. Aaron

Chairman
Social Security Advisory Board