



Social Security Advisory Board

Henry J. Aaron, Chair
Lanhee J. Chen
Alan L. Cohen
Bernadette Franks-Ongoy
Jagadeesh Gokhale
Dorcas R. Hardy
Barbara B. Kennelly

400 Virginia Avenue, SW
Suite 625
Washington, DC 20024
202-475-7700

Claire Green, Staff Director

Board Trip Meeting Minutes May 2-4, 2016

Location	Oakland, CA
Time:	8:00 a.m. – 3:00 p.m. (May 2) 8:00 a.m. – 7:00 p.m. (May 3) 8:20 a.m. – 12:30 p.m. (May 4)
SSAB Members:	Henry Aaron, Chair Lanhee Chen (May 2-3) Alan Cohen Jagadeesh Gokhale Barbara Kennelly (May 2-3)
SSAB Staff:	Claire Green, Staff Director Jackie Chapin, Policy Chief Anita Grant, Communications Director
Participants:	[at various times]
Social Security Administration (SSA) San Francisco Regional Operations Executives:	Grace Kim, Regional Commissioner Steve Breen, Deputy Regional Commissioner Hy Hinojosa, Assistant Regional Commissioners for Management and Operations Support Patricia Raymond, Regional Communications Director Sue Olsen, Deputy Regional Communications Director Sarah Kim Lee, Regional Public Affairs Specialist Rob Pepper, Bay Area Public Affairs Specialist Angelica Castillo, Regional Public Affairs Specialist Tayo Ajose, Employee Training and Development Team Rosa M. Rodriguez, Employee Training and Development Team Kham Soukhamthat, Employee Services Team Bill Lazell, Executive Officer Amy Allen, Deputy Executive Officer

Oakland District Office:

Adam Terry, Deputy Area Director, Bay Area
Christina Marin, District Manager, Oakland
District Office
Christine Womack, Assistant District Manager,
Oakland District Office
Jolaunne Dempsey, District Manager, East Oakland
District Office
Sean Tarnas, Operations Supervisor, Oakland
District Office
Pablo Pelayo, Operations Supervisor, Oakland
District Office
Linda Zamfino, District Office Supervisor, Bay
Area
Christopher Shum, Operations Supervisor,
Richmond, District Office

Center for Disability and Programs Support:

Bill Zuroff, Program Director
Natalie Bechtold, Team Leader
Stewart Cruz, Team Leader
Rebekah Alvarez, Management Analyst
Maria Schlosser, Management Analyst

Office of Disability Adjudication and Review:

Jennifer Horne, Regional Chief Administrative
Law Judge
Evangelina Hernandez, Hearing Office Chief
Administrative Judge
Prabhdyal Mundian, Hearing Office Director
Robert Barth, Acting Regional Management
Officer
Marie Avelar Simas, Special Projects Officer

Western Program Service Center:

Debby Ellis, Assistant Regional Commissioner for
Processing Center Operations
Ed Chin, Deputy Assistant Regional Commissioner
for Processing Center Operations
Bridget Creaven, Operations Support Branch Chief
Rosa Serrano, Deputy Operations Support Branch
Chief
Marcus Smith, Executive Officer
Leslie Kern, Operations Manager
Stanley Joe, Operations Manager
James Dokko, Operations Manager
Kim Johnson, Disability Processing Branch Chief

AFGE Council 147:

Cynthia Patrick, Council Designee

AFGE Council 1122:

Annett Brooks-Norman, Executive Vice President
Yvette Wilson, 1st Vice President
Bennie Bridges, 2nd Vice President
Renee Washington, Secretary

Local Union Leadership:	Judith Dickman, NTEU Representative
Office of General Counsel:	Geralyn Gulseth, Supervisory Attorney Counsel
Office of the Inspector General:	Jim Klein, Director, San Francisco Audit Division Robb Stickley, Special Agent in Charge, San Francisco Field Division
Office of Quality Review:	Darryl Moore, Director
Swords to Plowshares:	John Beem, Chief Financial Officer David Lopez, Associate Director of Client Services Tim Karo, Senior Case Manager Michelle Lewis, Representative Payee Case Manager

On May 2-4, the Board met in Oakland, California for a series of meetings with Regional Executives, management, and front-line employees. During this trip, the Board focused on systems modernization concerns, workload challenges, and representative payee issues.

The Board met with representatives from several components in Operations, Office of Disability Adjudication and Review, Office of the General Counsel, Office of Quality Review, and the Office of the Inspector General. During these meetings, the Board gathered valuable insight about local and national issues and SSA staff provided insights and ideas for improving the administration of Social Security programs.

In addition to meetings with SSA staff, the Board attended a public forum at the San Pablo Community Center sponsored by West County, the West County Senior Coalition, and the League of Women Voters. At the forum, Board members heard directly from members of the public and local stakeholders about their experiences with SSA and ideas to improve the Social Security system. The Board also heard from Swords to Plowshares, an organizational payee for homeless veterans, about their methods to secure housing for their clients.

I certify that the minutes written for the May 2-4, 2016 meeting of the Social Security Advisory Board are correct.



Henry J. Aaron