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Policy Forum Agenda

September 24, 2020

Virtual Session

The Social Security Advisory Board (“Board”) will host a virtual policy forum showcasing an independent, Board-commissioned study by researchers from the Virginia Tech Center for Gerontology and the American Bar Association Commission on Law and Aging. The first two panel discussions will cover capability determinations, the selection process, training, oversight, and the need for ongoing research and evaluation. The final panel will consider the public service implications of a more individualized, supported decision-making model, and how to get there.

Representative Payees:

Opportunities to Improve Service Delivery

9:45 am	Webinar Opens
10 – 10:10 am	Opening Remarks Kim Hildred , Chair, Social Security Advisory Board
10:10 – 11 am	Presentation of Findings: “Selection Process for SSA Payees of Adults” <i>The independent, Board-commissioned researchers will present their findings on the selection process for the appointment of payees, capability determinations, and the need for enhanced training.</i>

Laura P. Sands, Professor of Human Development and Family Science, Virginia Tech
Pamela B. Teaster, Director, Center for Gerontology and Professor of Human Development and Family Science, Virginia Tech
Erica F. Wood, Assistant Director, Commission on Law and Aging, American Bar Association (retired)
Henry J. Aaron (discussant), Member, Social Security Advisory Board

11 am – 12 pm

Initial Steps: Determining Financial Capability and Selecting the Best Payee

Panelists will discuss variation in the current process for determining capability and selecting payees, how the Strengthening Protections for Social Security Beneficiaries Act of 2018 (Protections Act) changed it, how COVID has affected it, and where it differs from other substitute decision-maker programs. Panelists will also discuss where additional study is needed and what types of data the agency should collect, if it's not already doing so.

J. Michael Collins, Faculty Director, Center for Financial Security and Fetzer Family Chair on Consumer and Personal Finance, University of Wisconsin – Madison

Elizabeth H. Curda, Director, Education, Workforce, and Income Security, Government Accountability Office

Kate Lang, Senior Staff Attorney, Justice in Aging

Linda Rutland, Assistant Director, Pension and Fiduciary Service, Veterans Benefits Administration, Department of Veterans Affairs

Laura P. Sands, Virginia Tech

Pamela B. Teaster, Virginia Tech

Erica F. Wood, American Bar Association (retired)

Christopher Detzler (*technical expert*), Executive Officer, National Council of Social Security Management Associations; District Manager, Vancouver, Washington Field Office, Social Security Administration

David Lescarini (*technical expert*), President, National Council of Social Security Management Associations; District Manager, McMinnville, Tennessee Field Office, Social Security Administration

Bob Joondeph (*moderator*), Member, Social Security Advisory Board

12 – 12:30 pm

Lunch Break

12:30 – 1 pm

Keynote Speech

A keynote speech will address supported decision-making, human rights, and legal capacity for people with intellectual and developmental disabilities.

The Honorable Kristin Booth Glen, Project Director, Supported Decision-Making New York; Dean Emerita, City University of New York School of Law

1 – 2:30 pm

Program Oversight: Monitoring Payees and Reevaluating Agency Payee Decisions

The independent researchers will briefly provide findings on the ongoing agency evaluation of payee decisions, including capability and payee selection. Panelists will discuss the oversight process at Social Security: how the Protections Act changed it, how COVID has affected it, and whether it incorporates similar efforts from other substitute decision-maker programs. Panelists will also discuss where opportunities exist to collect new data or share information with other entities.

Reeve T. Bull, Research Director,
Administrative Conference of the United States
Curtis Decker, Executive Director, National
Disability Rights Network

Ed Doonan, Chairman of the Board, National
Association of Organizational Representative
Payees; Government Affairs Liaison, Benefits
Management Corporation

Kate Lang, Justice in Aging

Kathryn Larin, Director, Education, Workforce,
and Income Security, Government
Accountability Office

Christopher Detzler (*technical expert*), National
Council of Social Security Management
Associations; Social Security Administration

David Lescarini (*technical expert*), National
Council of Social Security Management
Associations; Social Security Administration

Pamela B. Teaster (*discussant*), Virginia Tech

Erica F. Wood (*discussant*), American Bar
Association (*retired*)

Henry J. Aaron (*moderator*), Social Security
Advisory Board

2:30 – 2:45 pm

Break

2:45 – 4:15 pm

**Envisioning the Future: Payees in a Supported
Decision-Making Model**

*Panelists will address whether continuing to
focus on improving Social Security's program is
the right approach or whether the government
should move into more of an integrated supported
decision-making model, which is currently being
tested in different states and other countries.*

Kenneth S. Apfel, Professor of the Practice,
University of Maryland School of Public Policy;
former Commissioner of Social Security, Social
Security Administration

The Honorable Kristin Booth Glen, Supported Decision-Making New York; City University of New York School of Law

Louis D. Enoff, former Acting Commissioner of Social Security, Social Security Administration (*retired*)

Ari Ne’eman, PhD Candidate in Health Policy, Harvard University

Morgan K. 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

Christopher Detzler (*technical expert*), National Council of Social Security Management Associations; Social Security Administration

David Lescarini (*technical expert*), National Council of Social Security Management Associations; Social Security Administration

Henry J. Aaron (*discussant*), Social Security Advisory Board

Pamela B. Teaster (*discussant*), Virginia Tech

Erica F. Wood (*discussant*), American Bar Association (*retired*)

Bob Joondeph (*moderator*), Social Security Advisory Board

4:15 pm – 4:30 pm

Closing Remarks

Kim Hildred, Social Security Advisory Board

4:30 pm

Webinar Concludes

Please contact events@ssab.gov at least three business days in advance of the meeting to request a reasonable accommodation.