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”

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.
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.

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

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