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Roundtable Reexamining Long-Standing SSI Dedicated Account Challenges

Participant Bios

Jo Anne Barnhart, former Commissioner of Social Security, was nominated by President George W. Bush on July 17, 2001, and confirmed by the United States Senate on November 2 of that year. Barnhart served until January 19, 2007 and is the third longest serving Commissioner in agency history. Before Barnhart's appointment by President Bush, Commissioner Barnhart served for more than four years as a member of the Social Security Advisory Board, an independent body created to advise the Congress on Social Security issues and policies. A former Social Security employee, Barnhart worked in the Office of Family Assistance from 1981-1986, first as Deputy Associate Commissioner and then as Associate Commissioner. Barnhart served as minority Staff Director for the Senate Committee on Governmental Affairs from 1986-1990. From 1990-1993, Barnhart served as Assistant Secretary for Children and Families at the Department of Health and Human Services, overseeing more than 65 programs, including Aid to Families with Dependent Children. During Barnhart's career, Barnhart has served as Senator William V. Roth, Jr.'s Legislative Assistant (1977-1981) and as Roth's Campaign Manager (1988, 1994 and 2000), and managed Barnhart's own political and public policy consulting firm. A graduate of the University of Delaware, Commissioner Barnhart was born in Memphis, Tennessee. Barnhart lives in Virginia with her husband and son.

Gregory Brusik is Vice President of the National Council of Social Security Management Associations (NCSSMA). Brusik has worked for the Social Security Administration (SSA) for 13 years. Brusik is the District Manager of the Bellingham, WA SSA office and has held management positions in Idaho and Wyoming. Brusik has participated on various workgroups, primarily focusing on management and administration.

Taramattie Doucette, JD, is the Project Director for the Children’s Disability Project (CDP) at Greater Boston Legal Services (GBLS). Doucette graduated from Northeastern University School of Law in 1988 and has worked at GBLS for the past 28 years and has significant experience representing people with disabilities who were wrongfully denied disability (SSI/SSDI) or public health benefits and enforcing the legal rights of persons with disabilities. Most of Doucette’s work involves representing individuals at various administrative levels of appeals before the Social Security Administration and in Federal Court. Doucette co-founded CDP in 2007 in order to represent GBLS’s most vulnerable clients, low-income children with disabilities. Doucette has also provided community legal education on disability benefits rights. In addition, Doucette has been lead counsel on the class action lawsuit Daniels-Finegold, et al. v. MBTA, No. 02 CV 11504 MEL (D. Mass. Jul. 25, 2002) since 2000. This lawsuit, which was settled in April 2006, challenged the accessibility and usability of the MBTA’s services for people with disabilities and was filed under the Americans with Disabilities Act. As a result of the lawsuit, the MBTA agreed to invest \$310 million to improve public transportation access and services for people with disabilities. Doucette continues to oversee the enforcement of the Settlement Agreement, and trains law students, advocates, and consumers to enforce the legal rights of people with disabilities.

Rachel A. Emmons is a Government Relations and Public Affairs Specialist with expertise in the federal legislative process and currently represents the National Council of Social Security Management Associations (NCSSMA), Inc. Emmons joined Greystone Group in 1994 and currently serves as Principal, specializing in appropriations and public policy issues for educational and other not-for-profit organizations. Emmons received a Bachelor of Music from Iowa State University and Master of Music and Doctor of Musical Arts degrees from the Catholic University of America in Washington, DC.

James J. Klein is the Director of the San Francisco Audit Division for the Social Security Administration (SSA), Office of the Inspector General (OIG). In this capacity, Klein oversees nation-wide performance and financial audits of SSA programs. Klein also directs regional audits in Alaska, Arizona, California, Hawaii, Idaho, Nevada, Oregon and Washington. Klein’s federal career began in SSA’s Office of Operations in 1982. In 1989, Klein joined the Department of Health and Human Services’ OIG as a Program Analyst, focusing on audits of SSA’s programs and operations. When SSA became an independent agency in 1995, Klein joined its OIG as an Auditor. Most recently, Klein was an Audit

Manager in OIG's, General Management Audit Division in Baltimore, Maryland. Klein has received numerous individual and team awards for meritorious service, including the Council of the Inspectors General on Integrity and Efficiency Alexander Hamilton Award, Glenn/Roth Award for Exemplary Service and Audit Awards for Excellence. Klein is also a recipient of several Inspector General Awards and two Commissioner's Citations—the agency's highest award. Klein received a bachelor's degree from the University of Delaware and is a Certified Public Accountant.

Linda Landry, JD, is a Senior Attorney who has worked at the Disability Law Center (DLC) since 1990. Landry's focus is on Social Security benefit issues and work incentives, as well as the related health benefits, MassHealth and Medicare. Landry has over 30 years of experience in legal advocacy in these areas, which has included individual representation, training, impact and policy work, class action litigation, and backup, support, and technical assistance to a statewide project of attorneys and advocates who represent individual Social Security and SSI disability benefits claimants. Landry writes and presents on a variety of topics for local and national audiences. Landry is a graduate of Northeastern University School of Law and worked at Neighborhood Legal Services in the 1980s before coming to DLC. Landry received the NOSSCR Distinguished Service Award in 2006, the Massachusetts Bar Association Equal Access to Justice Award in 2011, and a Massachusetts Top Women of the Law Award in 2013.

David Lescarini is President of the National Council of Social Security Management Associations (NCSSMA). Lescarini has worked for the Social Security Administration (SSA) for 21 years. For the last 15 years, Lescarini has held the position of District Manager in McMinnville, Tennessee. Lescarini has participated and chaired numerous workgroups within SSA and NCSSMA, primarily focused on information technology and innovation.

Mary E. O'Connell, JD, Professor Emerita, served on the faculty of Northeastern University School of Law from 1980 until O'Connell's retirement in 2017. Professor O'Connell's teaching focused largely on issues affecting children, including courses in the Law of Public Education and Family Law. O'Connell's writings explore the law's struggles in addressing the needs of individuals who deviate from what was long presumed to be the norm: long-term employment that pays a living wage, entitles the worker to benefits, and is sufficient to support a family. In works on the history of alimony, the linkage between health insurance and employment, and the difficulties of individuals

whose own or a family member's disability disrupts their work life, Professor O'Connell explores the law's difficulty in meeting the needs of these individuals. Professor O'Connell is a graduate of Brandeis University (BA 1970) and Northeastern University School of Law (JD 1975). O'Connell has maintained a long-standing relationship with the Children's Disability Project at Great Boston Legal Services which, for a number of years, sponsored a fellowship in O'Connell's name.

Board Member Bios

Kim Hildred currently serves as President of Hildred Consulting, LLC, and Chair of the Social Security Advisory Board. In 2015, Hildred retired from the 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 BA from Waynesburg University and a Master of Science in education degree from Duquesne University. Hildred's current term of office as a House appointee is September 2016 to September 2022.

Nancy 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 coauthor of *Social Security Works! Why Social Security Isn't Going Broke and How Expanding It Will Help Us All*. Altman has an AB from Harvard University and a JD from the University of Pennsylvania Law School. Altman's current term of office as a House appointee is October 2017 to September 2023.

Jagadeesh Gokhale, PhD, is the Director of Special Projects at the Penn Wharton ("Wharton") Budget Model. Prior to joining Wharton, 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. 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. Gokhale 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 the solvency of the Social Security trust funds. Gokhale published work in numerous professional journals, as well as newspapers such as *The Wall Street Journal*, *The Financial Times*, *The Washington Post*, and *Forbes*. Gokhale's current term of office as a Senate appointee is October 2015 to September 2021.

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 graduated from the Case Western Reserve Law School and Brown University. Joondeph's current term of office as a Senate appointee is October 2018 to September 2024.