

**Moving Forward –
Implementing Changes in the Representative Payee Program**
Friday, September 7, 2018



Speaker Biographies

Welcome Remarks

Kim Hildred currently serves as president of Hildred Consulting LLC. In early 2015, Kim retired from the US House of Representatives after serving 17 years as staff director of the Committee on 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 in the oversight of these programs. Hildred's efforts contributed to the Committee holding over 120 hearings and the signing of ten bills into law, including the Ticket to Work and Work Incentives Improvement Act of 1999 (P.L.106-170), the Senior Citizens' Freedom to Work Act of 2000 (P.L.106-182), and the Social Security Protection Act of 2004 (P.L.108-203). Hildred's prior service includes three years deciding Social Security disability claims for the states of Kansas and Wisconsin, followed by 10 years of increasingly responsible positions in managing Social Security disability programs in the Chicago and Philadelphia regions of the Social Security Administration, including federal disability hearing officer, and disability program administrator. Hildred has a bachelor of arts degree from Waynesburg University and a master of science in education from Duquesne University. Current term of office: September 2016 to September 2022.

Panel I: Historical and Legislative Overview of the Representative Payee Program

Kathryn Olson is the Democratic staff director for the Subcommittee on Social Security (John B. Larson, Connecticut, Ranking Member) of the House Committee on Ways and Means (Richard E. Neal, Massachusetts, Ranking Member), where Olson has served the majority of her professional career. Olson was also director of income security at the National Academy of Social Insurance, a nonpartisan think tank focusing on Social Security and Medicare (1995-1998, and 1999-2001). In 1998-99, Olson served as staff director of the Senate Democratic Task Force on Social Security, chaired by Senator Jeff Bingaman (New Mexico). Prior to joining the Committee staff in 1988, Olson served as a legislative assistant for Congressman Martin Olav Sabo (Minnesota).

Amy Shuart is the staff director of the Social Security Subcommittee of the Committee on Ways and Means. In this role, Shuart manages the Subcommittee's oversight and legislative agenda. Prior to joining the Committee's staff in 2011, Shuart was a Presidential Management Fellow (PMF). As a PMF, Shuart worked for the Social Security Administration, the Medicare Branch of the Office of Management and Budget, and the Committee on Ways and Means. Shuart holds a bachelor of arts in political science and a bachelor of arts in public and urban affairs from Virginia Tech, as well as a master of public affairs from the LBJ School at the University of Texas.



Moving Forward – Implementing Changes in the Representative Payee Program

Friday, September 7, 2018



Lanhee J. Chen, PhD is the David and Diane Steffy Research Fellow at the Hoover Institution; director of domestic policy studies and lecturer in the Public Policy Program at Stanford University; lecturer in law at Stanford Law School; and an affiliate of the Freeman Spogli Institute for International Studies at Stanford University. Dr. Chen was the policy director for the Romney-Ryan 2012 presidential campaign, as well as Governor Romney’s chief policy adviser; a senior strategist on the campaign; and the person responsible for developing the campaign’s domestic and foreign policy. In the George W. Bush administration, Dr. Chen was a senior official at the US Department of Health and Human Services. Dr. Chen also served as domestic policy director of Governor Romney’s first campaign for president and as a health policy adviser on President George W. Bush’s reelection campaign. Dr. Chen was also an associate attorney at the international law firm of Gibson, Dunn & Crutcher LLP. Dr. Chen currently serves on the Board of Trustees of the Junior Statesmen Foundation and on the Advisory Board of the Partnership for the Future of Medicare. Dr. Chen earned a PhD and AM in political science from Harvard University, a JD *cum laude* from Harvard Law School, and an AB *magna cum laude* in government from Harvard College. Current term of office: September 2014 to September 2018.

Administration Remarks

Mark J. Warshawsky, PhD is deputy commissioner for retirement and disability policy at the Social Security Administration (SSA). Dr. Warshawsky’s interests include social security, employer-sponsored pension and retirement programs, financial planning, health and long-term care financing, public finance and macroeconomics. Dr. Warshawsky has testified before Congress and administrative agencies many times. Recently, Dr. Warshawsky served as a senior research fellow at the Mercatus Center of George Mason University, as well as a visiting scholar at the MIT Golub Center for Finance and Policy. Dr. Warshawsky has authored over 150 published articles as well as four books. From 2006 to 2013, Dr. Warshawsky also served as the director of retirement research at Towers Watson, a global human capital consulting firm. Dr. Warshawsky served on the Social Security Advisory Board from 2006 through 2012 and was the vice chairman of the Federal Commission on Long-Term Care in 2013. From 2004 to 2006, Dr. Warshawsky was the assistant secretary for economic policy at the US Department of Treasury, and served an important role in the development of the Pension Act of 2006. Dr. Warshawsky earned a PhD in economics from Harvard University and a bachelor of arts with highest distinction from Northwestern University.



Hosted by the Social Security Advisory Board at the U.S. Capitol Visitor Center.
www.ssab.gov | [twitter ssabgov](https://twitter.com/ssabgov) | [#RepPayee](https://twitter.com/RepPayee)

Moving Forward – Implementing Changes in the Representative Payee Program

Friday, September 7, 2018



Panel II: Exploring Different Experiences: Representative Payee Order of Preference in the Selection and Replacement Process

Miatta Edi-Osagie is an experienced licensed healthcare administrator and has spent the past eight years working for the largest long term and skilled nursing care providers in New England. After earning a master of science in healthcare administration from the University of Maryland-UC, Edi-Osagie began a long-term care career as a long term care ombudsman in the state of Massachusetts and volunteered as nursing home patient and resident advocate for the Massachusetts Office of Elder Affairs. This commitment to advocacy on behalf of the elder and infirmed remains the cornerstone of Edi-Osagie’s role as a nursing home administrator. Edi-Osagie has experienced multiple changes in the long-term care industry and has successfully maintained a hands-on management style. With a personal achievement as a trouble-shooter and an exceptional background in leadership, supervision, and the development of cost effective systems which result in “turn-around” situations, Edi-Osagie leads facilities with a track record of great state and federal compliance and financial viability.

Jennifer Flynn is a senior director for Money Management International (MMI), the largest nonprofit, full service credit counseling agency in the United States. Flynn is in charge of managing the oversight, day-to-day operations and industry relationships of CrissCross Representative Payee, a division of MMI, which currently represents approximately 2,200 clients nationwide. Flynn’s career began 27 years ago as a volunteer with Consumer Credit Counseling Service (CCCS) of Rhode Island, which at that time was a start-up organization. Flynn held a variety of positions, such as senior director of education, senior director of industry relations, and director of support services, where Flynn was responsible for a staff of 40 and billions of dollars of debt for 30,000 clients. Prior to that position, Flynn was the president of another nonprofit organization that provided support 24 hours, seven days a week to CCCS agencies throughout the United States and Canada. Flynn is a graduate of the University of Rhode Island, and was the 2005 recipient of the College of Human Science and Services Distinguished – Achievement Alumni Award. Flynn also serves on the board for the Women’s Council for Development at the University of Rhode Island. Flynn has served on several award-winning national committees, many of which have also raised funds for financial educational programs and scholarships. Involved in the community, Flynn chaired a committee for the US Marine Toys for Tots program for 10 years, successfully raising thousands of dollars and providing thousands of toys to children in Rhode Island and nearby communities. Flynn currently resides in Warwick, Rhode Island.



Hosted by the Social Security Advisory Board at the U.S. Capitol Visitor Center.

www.ssab.gov | [ssabgov](https://twitter.com/ssabgov) | [#RepPayee](https://twitter.com/RepPayee)

Moving Forward – Implementing Changes in the Representative Payee Program

Friday, September 7, 2018



Jerry Hynes serves as the vice president of payee services at Skils'kin, where Hynes is expanding the work Skils'kin does with partner organizations who provide housing, mental health and other supports to help to clients. Hynes focuses on specific service areas like assisted and supported living providers and ways to more tightly integrate intake processes with organizations like the State Department of Social and Health Services. Before joining Skils'kin, Hynes had a successful career in the Seattle area, serving in leadership roles for high-profile companies. Since moving to Spokane in 2013, Hynes has been involved with Free Rein Therapeutic Riding and Morning Star Boys Ranch. Hynes has a master's degree in non-profit management and was a past board member of the Developmental Disabilities Life Opportunities Trust.

Kate Lang has served as a staff attorney for Justice in Aging's Income Team since December 2012. As a staff attorney, Lang works on Social Security and Supplemental Security Income-related issues. Previously, Lang worked as a staff attorney for the Legal Aid Bureau in Riverdale, MD, advocating for low-income older adults and persons with disabilities. Lang has also worked as an attorney for the National Legal Aid and Defender Association and Bread for the City Legal Clinic in Washington, DC, as well as Doherty, Cella, Keane and Associates LLP. In addition, Lang has served as the staff attorney for Legal Services of Northern California. Lang received a BA from Oberlin College and a JD from Fordham University School of Law. Lang also earned a master's degree from the University of Pennsylvania in teaching English to speakers of other languages.

Christy Respress has more than 20 years of experience working with individuals who are experiencing homelessness and living with complex behavioral health challenges. Respress has worked with Pathways to Housing for 17 years, and has been in the role of executive director of Pathways to Housing DC since January 2011. Respress has extensive knowledge of Housing First and has provided technical assistance to agencies and communities around the country to implement this innovative model. Respress is also the president of the Board of Directors of the DC Behavioral Health Association. Christy received a bachelor of arts in social work from The Catholic University of America and a master's in social work from Howard University.



Hosted by the Social Security Advisory Board at the U.S. Capitol Visitor Center.
www.ssab.gov | [twitter ssabgov](https://twitter.com/ssabgov) | [#RepPayee](https://twitter.com/RepPayee)

Moving Forward – Implementing Changes in the Representative Payee Program

Friday, September 7, 2018



Panel III: Evidence-Based Approaches to Representative Payee Policy

Nick Hart, PhD is the director of the Bipartisan Policy Center’s Evidence-Based Policymaking Initiative. Dr. Hart also serves as the chair of American Evaluation Association’s Evaluation Policy Task Force. Previously, Dr. Hart served as a policy and research director for the US Commission on Evidence-Based Policymaking. In that capacity, Dr. Hart oversaw the commission’s Policy and Research Support Team and led the drafting process for “The Promise of Evidence-Based Policymaking,” the commission’s final report and recommendations presented to the Congress and the president in September 2017. Dr. Hart was also senior manager of Office Management and Budget, where Dr. Hart contributed to writing executive branch budget proposals and encouraged increased capacity for evidence-based practices across government. In addition, Dr. Hart served as a president and board member of the Washington Evaluators, a DC-based professional organization for program evaluations. Dr. Hart holds a doctorate from The George Washington University’s Trachtenberg School of Public Policy and Public Administration, specializing in program evaluation. Dr. Hart also holds a master of science degree in environmental science, a master of public affairs degree from Indiana University, and a bachelor of science degree from Truman State University.

James J. Klein is the director of the San Francisco Audit Division for the 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.



Moving Forward – Implementing Changes in the Representative Payee Program

Friday, September 7, 2018



Peri Jude Radecic has contributed passion and advocacy to civil rights over the past three decades with a focus in the areas of disability, gay, lesbian, bisexual and transgender (LGBT), and women’s rights. Radecic has worked with all functions and branches of government in the development, implementation and judicial review of civil rights laws and legislations. Radecic has worked as a community organizer in Montgomery, Maryland for women and the LGBT, the National Organization for Women, and the National Gay and Lesbian Task Force. Following law school, Radecic drafted changes to the Civil Rights Ordinance and wrote policies to ensure effective local minority and business development programs for the city of Tucson. Radecic also served as the state civil rights manager for rural development and was responsible for the implementation of federal civil rights laws within the agency as well as with the recipients of federal funds. Before joining Disability Rights Pennsylvania, Radecic was the executive director of the Arizona Center for Disability. Radecic was born in Pittsburgh, Pennsylvania. Radecic is a graduate of the University of Pittsburgh and the University of Arizona College of Law.

Pamela B. Teaster, PhD is the director of the Center for Gerontology and a professor in the Department of Human Development and Family Science at Virginia Tech. Dr. Teaster established the Kentucky Justice Center for Elders and Vulnerable Adults. Dr. Teaster also founded the Kentucky Guardianship Association and was its first president. Dr. Teaster is the secretary general of the International Network for the Prevention of Elder Abuse and is on the Board of Trustees of the Center for Guardianship Certification. Dr. Teaster serves on the Editorial Board of the Journal of Elder Abuse and Neglect. Dr. Teaster is a fellow of the Gerontological Society of America and the Association for Gerontology in Higher Education. Dr. Teaster is a recipient of the Rosalie Wolf Award for Research on Elder Abuse, the Outstanding Affiliate Member Award (Kentucky Guardianship Association), and the Distinguished Educator Award (Kentucky Association for Gerontology). Dr. Teaster serves on the board of the National Committee for the Prevention of Elder Abuse and is a former president. Dr. Teaster’s areas of scholarship include the abuse of elders and vulnerable adults, public and private guardianship, end-of-life issues, ethical treatment of older adults, public policy and public affairs, and quality of life. Dr. Teaster has published over 100 scholarly articles and book chapters and is the editor or author of four books. Before joining Virginia Tech, Dr. Teaster spent 12 years at the University of Kentucky as professor, associate dean for research, and director of doctoral studies in the College of Public Health. Dr. Teaster has a bachelor’s and a master’s degree from the University of Tennessee at Knoxville. Dr. Teaster received a PhD and a certificate in gerontology from Virginia Tech.



Hosted by the Social Security Advisory Board at the U.S. Capitol Visitor Center.
www.ssab.gov | [ssabgov](https://twitter.com/ssabgov) | [#RepPayee](https://twitter.com/RepPayee)

Moving Forward – Implementing Changes in the Representative Payee Program

Friday, September 7, 2018



Henry J. Aaron, PhD is the Bruce and Virginia MacLaury Senior Fellow in the Brookings Institution Economic Studies Program, and also served as its director from 1990 through 1996. Dr. Aaron previously taught at the University of Maryland and at Harvard University. Dr. Aaron served as assistant secretary for planning and evaluation at the Department of Health, Education, and Welfare and chaired the 1979 Advisory Council on Social Security. Dr. Aaron is a member and vice-chair of the District of Columbia Health Benefits Exchange. Dr. Aaron is a member of the Institute of Medicine, the American Academy of Arts and Sciences, the Advisory Committee of the Stanford Institute for Economic Policy Research, and the Center on Budget and Policy Priorities. Dr. Aaron was a member of the Congressional Budget Office Panel of Economic Advisers and Panel of Health Advisers, the visiting committees of the Harvard Medical and Dental Schools and Department of Economics, and the boards of directors of Abt Associates, Georgetown University, and the College Retirement Equity Fund. Dr. Aaron was a founding member, vice-president, and board chair of the National Academy of Social Insurance. Dr. Aaron has been vice-president and member of the executive committee of the American Economic Association, and was president of the Association of Public Policy and Management. Dr. Aaron received a BA in political science and economics from UCLA and holds a MA in Russian regional studies and a PhD in economics from Harvard University. Current term of office: September 2014 to September 2020.



Hosted by the Social Security Advisory Board at the U.S. Capitol Visitor Center.
www.ssab.gov | [twitter ssabgov](https://twitter.com/ssabgov) | [#RepPayee](https://twitter.com/RepPayee)

Moving Forward – Implementing Changes in the Representative Payee Program

Friday, September 7, 2018



Closing Remarks

Bernadette Franks-Ongoy is the executive director for Disability Rights Montana, an organization that protects and advocates for the human, legal, and civil rights of Montanans with disabilities. Franks-Ongoy manages and oversees the day-to-day activities of Disability Rights Montana and sets the tone to ensure that the organization’s mission to advance dignity, equality, and self-determination is being accomplished. Franks-Ongoy says, “I was raised by a mother with a disability and a father who did not realize he was a feminist.” Franks-Ongoy lived in an accessible house before the Americans with Disability Act was the law. Franks-Ongoy’s mother’s wheelchair could access every room. “After all mom needed to have access to my brothers and sisters rooms with her wheelchair.” Franks-Ongoy is the youngest of eight siblings including a brother with a mental illness. Franks-Ongoy grew up in the sugar plantation town of Waiialua, Hawaii. With the support of Job Corp, Social Security, and other financial aid, Franks-Ongoy attended and graduated from Chaminade University with a bachelor of science degree in criminal justice and a bachelor of arts degree in sociology. Franks-Ongoy graduated from the University of San Diego School of Law in 1983. Franks-Ongoy’s past legal experience includes: law clerk, First Judicial Circuit Court in Hawaii, founding executive director of the Hawaii Bar Foundation, deputy corporation counsel, City and County of Honolulu, and attorney and director of programs for the protection and advocacy system in Hawaii. Franks-Ongoy is licensed to practice law in Hawaii and with the United States Court of Appeals for the Ninth Circuit. Franks-Ongoy has served as president of the National Disability Rights Network and most recently was a member of Montana’s Equal Justice Task Force. Current term of office: January 2013 to September 2018.

