

Social Security Advisory Board

# Annual Report

Fiscal Year 1999

October 1999

**Social Security Advisory Board**

An independent, bipartisan Board created by the Congress and appointed by the President and the Congress to advise the President, the Congress, and the Commissioner of Social Security on matters related to the Social Security and Supplemental Security Income programs.

## TABLE OF CONTENTS

<b>I. Establishment of the Board .....</b>	<b>1</b>
<b>II. The Board's Mandate .....</b>	<b>1</b>
<b>III. Major Activities of the Board.....</b>	<b>2</b>
<i>A. Service to the Public .....</i>	<i>2</i>
<i>B. Long-Range Financing.....</i>	<i>5</i>
<i>C. Disability Programs .....</i>	<i>6</i>
<i>D. Supplemental Security Income Program.....</i>	<i>7</i>
<i>E. Public Understanding of Social Security.....</i>	<i>9</i>
<i>F. Policy Development, Research, and Program Evaluation .....</i>	<i>9</i>
<b>IV. Board Operations and Communications.....</b>	<b>11</b>
<b>V. Board Visits to Field Sites in 1999 .....</b>	<b>12</b>
<b>VI. Reports and Publications.....</b>	<b>14</b>
<b>VII. Members of the Board .....</b>	<b>15</b>



October 1999

## Message From the Board

In 1994, when the Congress passed legislation establishing the Social Security Administration as an independent agency, it also created an independent, bipartisan Advisory Board to advise the President, the Congress, and the Commissioner of Social Security on matters related to the Social Security and Supplemental Security Income programs. Under this legislation, appointments to the Board are made by the President, the Speaker of the House of Representatives, and the President pro tempore of the Senate. Presidential appointees are subject to Senate confirmation.

Since the Board began meeting in the Spring of 1996, it has worked to address the broad mandate that the law provides. As this Annual Report describes, the Board's work has encompassed a number of important issues, including the agency's quality of service to the public; long-range financing for Social Security; changes in the disability programs; the Supplemental Security Income program; public understanding of Social Security; and policy development, research, and program evaluation. We have issued a number of reports with recommendations, all of which have had the unanimous approval of the Board. Our reports have been widely distributed to members of Congress, the Executive Branch, and the public.

This is the second Annual Report that the Board has issued. It describes the work that the Board has completed and the work that we currently have underway. We plan to issue similar reports in future years because it is important that we be accountable to the public. The Board is committed to working hard to help both the Congress and the Executive Branch in fulfilling their responsibilities with respect to the Social Security and Supplemental Security Income programs.

*Stanford G. Ross, Chair*

*Jo Anne Barnhart*

*Lori L. Hansen*

*Martha Keys*

*Sylvester J. Schieber*

# **Social Security Advisory Board Annual Report Fiscal Year 1999**

## **I. Establishment of the Board**

In 1994, when the Congress passed legislation establishing the Social Security Administration as an independent agency, it also created a 7-member bipartisan Advisory Board to advise the President, the Congress, and the Commissioner of Social Security on matters relating to the Social Security and Supplemental Security Income (SSI) programs. The conference report on the legislation passed both Houses of Congress without opposition. President Clinton signed the Social Security Independence and Program Improvements Act of 1994 into law on August 15, 1994 (P.L. 103-296).

Advisory Board members are appointed to 6-year terms, made up as follows: three appointed by the President (no more than two from the same political party); and two each (no more than one from the same political party) by the Speaker of the House (in consultation with the Chairman and the Ranking Minority Member of the Committee on Ways and Means) and by the President pro tempore of the Senate (in consultation with the Chairman and Ranking Minority Member of the Committee on Finance). Presidential appointees are subject to Senate confirmation.

Board members serve staggered terms. The statute provides that the initial members of the Board serve terms that expire over the course of the first 6-year period. The Board currently has two vacancies.

The Chairman of the Board is appointed by the President for a 4-year term, coincident with the term of the President, or until the designation of a successor.

In addition to the Chairman, the members of the Board are Jo Anne Barnhart, Lori L. Hansen, Martha Keys, and Sylvester J. Schieber. Stanford G. Ross was named by the President as member and Chair of the Advisory Board and confirmed by the Senate in October 1997.

## **II. The Board's Mandate**

The law gives the Board the following functions:

- 1) analyzing the Nation's retirement and disability systems and making recommendations with respect to how the Old-Age, Survivors, and Disability Insurance (OASDI) programs and the Supplemental Security Income (SSI) program, supported by other public and private systems, can most effectively assure economic security;
- 2) studying and making recommendations relating to the coordination of programs that provide health security with the OASDI and SSI programs;
- 3) making recommendations to the President and to the Congress with respect to policies that will ensure the solvency of the OASDI programs, both in the short term and the long term;
- 4) making recommendations with respect to the quality of service that the Social Security Administration provides to the public;
- 5) making recommendations with respect to policies and regulations regarding the OASDI and SSI programs;
- 6) increasing public understanding of Social Security;
- 7) making recommendations with respect to a long-range research and program evaluation plan for the Social Security Administration;
- 8) reviewing and assessing any major studies of Social Security as may come to the attention of the Board; and
- 9) making recommendations with respect to such other matters as the Board determines to be appropriate.

### **III. Major Activities of the Board**

Consistent with its broad mandate, the Board has devoted attention to a number of issues simultaneously, as described below.

#### ***A. Service to the Public***

When legislation was enacted in 1994 establishing the Social Security Administration as an independent agency and creating an independent, bipartisan Social Security Advisory Board, both the Congress and the President emphasized that a major objective of the legislation was to improve service to the public. The legislation gave the Advisory Board the specific charge of making recommendations for improving the quality of service that the agency provides to the public.

Over the last two years the Board has focused its attention on how SSA is currently meeting its extensive public service demands and how its service can be improved. The Board's study took it to offices throughout the country – Atlanta; Boston; Chicago; Dallas; Fort Lauderdale; Kansas City, Kansas; Kansas City, Missouri; Los Angeles; Miami; New York; Philadelphia and San Francisco – and to offices in rural and suburban areas as well. On these visits, the Board met with employees in field offices, hearing

offices, regional offices, program service centers, and teleservice centers, as well as the State agencies that make disability determinations for SSA.

The Board held public hearings in San Francisco, Dallas, and Chicago at which it heard from public officials, experts, advocacy groups, and individuals who shared their views on how SSA can improve its service to the public.

Within SSA's headquarters, the Board met many times with officials responsible for both service delivery and support functions. The Board also heard from union officials, from representatives of the National Partnership for Reinventing Government, the U.S. Postal Service, Internal Revenue Service, General Accounting Office, and from individuals in the private sector.

As a result of its research, the Board issued a report in September 1999 entitled *How the Social Security Administration Can Improve Its Service to the Public*. In summary, the report finds that SSA's capacity to serve the public is not as strong as it should be and changes are urgently needed.

The agency's problems stem from a combination of factors, including a prolonged period of downsizing, a growing workload, and increasing program complexity. The Board found that employees throughout the agency's field operations are having increasing difficulty in keeping up with their growing workloads. The emphasis on meeting processing time goals is causing burnout and affecting employee morale. Overworked managers and supervisors lack the time to provide the training and perform the quality reviews that are needed to ensure the accuracy and integrity of the Social Security and SSI programs.

Moreover, the agency will face additional challenges over the coming decade. According to actuarial projections, the agency's workload will increase greatly. SSA will have to process increasingly larger numbers of Social Security retirement claims. More taxing on its resources, however, will be the greatly increased numbers of disability claims that it will receive. Disability applications are highly labor intensive, as are Supplemental Security Income claims, which are also growing. The combination of the growth in these workloads with a large wave of retirements by SSA's own aging workforce will place extraordinary pressures on the agency to meet the public's needs for service.

In its report, the Board noted that although the agency's difficulties will grow in the next decade, it has a number of service delivery problems that need attention now. Telephone service is inadequate, with too many callers unable to get prompt service either through the agency's 800 number or in field offices. Many who visit one of SSA's 1,291 field offices encounter overcrowded waiting areas and long waits for service. Heavy workloads and pressures to meet processing times mean that field office employees often do not have sufficient time to help claimants understand complex disability eligibility rules or to help them file adequately documented disability claims. Heavy workloads are contributing to a rapidly

growing backlog of postentitlement actions that are necessary to maintain the accuracy of the benefit rolls.

The Board made four overarching recommendations to improve the quality of the service SSA provides:

- 1) **The agency needs to develop a service delivery plan that describes how it will deliver service over the short term and the long term.** SSA needs to resolve how it will handle its growing workloads, whether through increases in staffing, technological improvements, changes in the way the agency processes its work, or a combination of these approaches. It should use its service delivery plan as a tool to clarify its service delivery priorities and the reasons for them so that they can be evaluated and understood by the agency's own employees and by policy makers and the public.
- 2) **SSA should work to ensure that it will have the human resources it needs to carry out its plan.** The agency has been significantly downsized over the last two decades, experiencing a 26 percent decline in the total number of employees since 1982, compared with a decline in overall civilian employment in the Federal government of about 12 percent. The Board observed that the agency cannot sustain any further reductions in staffing, and in fact now faces staffing shortages in key parts of its organization. The agency should develop a comprehensive workforce plan and base its appropriations requests on this plan. SSA's administrative budget, like its program budget, should be explicitly excluded from the statutory cap that imposes a limit on the amount of discretionary government spending.
- 3) **Major improvements are needed in a number of the agency's service delivery practices and strategies.** SSA should become much more oriented toward meeting the needs and expectations of its clients. It should carefully measure the public's needs and expectations and use this information to guide its decisions on how to deliver high quality service. SSA also needs to improve the way it measures its performance and should test its performance against that of successful organizations in the public and private sectors. To meet its goal of providing world-class service, SSA must make dramatic improvements in its telephone service and accelerate significantly its ability to use new technologies in conducting its work.
- 4) **SSA needs to address long-standing institutional problems.** The agency needs to promote more open discussion of problems, strengthen communications between SSA's headquarters and operations in the field, and promote better teamwork among its many components with parallel responsibilities that must together carry out the agency's mission. There need to be clearer lines of responsibility and more precise accountability for major segments of the agency's work.

The Board observed that SSA has significant strengths, most notably a dedicated workforce and a management that ranks among the top of government agencies. The Board

has been impressed by the continuing enthusiasm of SSA staff for serving the public, under what are often very trying circumstances.

The Board concluded that SSA will have to make critical changes on a major scale if it is to improve the quality of service that it provides. However, if the agency vigorously pursues the Board's recommendations summarized above and gets the support it needs, there is no reason why it cannot live up to its tradition of service excellence.

## ***B. Long-Range Financing***

The 1999 Report of the Board of Trustees of the Old-Age and Survivors Insurance and Disability Insurance Trust Funds projects a slight improvement in the long-range status of these programs. The deficit over the 75-year valuation period is projected to be 2.07 percent of taxable payroll (compared to a projected deficit of 2.19 percent in the 1998 Report). The 1999 Trustees Report also projects that the assets in the Trust Funds will be depleted in 2034 (compared to 2032 in the 1998 Report).

Despite this estimated small improvement in the status of the Trust Funds, the program is still expected to be seriously underfunded in the long range. The Board believes that it is essential for policy makers to have the information they need to understand the implications of various aspects and approaches to this problem. In order to enhance understanding of the issues surrounding the long-term financing problems of the Social Security system, the Board issued a report in July 1998 entitled *Social Security: Why Action Should Be Taken Soon*. This report described the dimensions of the changes that are required if the Social Security system is to maintain solvency over the long term, and the reasons why these changes should be made soon. The report also provided a brief description of alternative proposals to address the long-range solvency problem, along with data on their impact.

During fiscal year 1999 the Board sponsored two major activities relating to Social Security financing.

**Policy Forum.** — To help both policy makers and the public understand the implications of changes in the retirement age, the Advisory Board sponsored a forum on "Implications of Raising the Social Security Retirement Age" in October 1998. A major factor in the increased cost of the Social Security program is the rising life expectancy for people reaching retirement age. Consequently many of the suggestions for fixing the long-range financing problem involve increasing the age at which full Social Security benefits can be paid. Raising the retirement age beyond the increases already scheduled in present law would have an impact beyond the reduction in Social Security program costs.

The Board assembled 17 experts on Social Security, retirement, the labor force and related subjects to present and discuss their findings. Issues that were examined included: 1)

the implications of the retirement of the baby boomers for both the labor force and for Social Security financing; 2) labor force participation of older people both

in the United States and abroad; 3) how people respond to changes in their retirement wealth; and 4) stochastic modeling of Social Security program costs in the future and what such modeling indicates about the impact of retirement age changes. A report on the forum proceedings has been posted on the Board's web site.

**Technical Panel.** — The Board's other major project relating to the long-range financing of the Social Security program was the appointment of the 1999 Technical Panel on Assumptions and Methods to examine the economic and demographic assumptions underlying the projections made by the Social Security Board of Trustees. In the past, such panels have been appointed by the Social Security Advisory Councils appointed every four years under a previous provision of law. However, this provision was repealed by the 1994 legislation making the Social Security Administration independent and creating the Advisory Board. The Board has taken on the responsibility for the appointment of future panels.

The Board believes that it is critical that the public and the Congress have confidence in the Social Security Trust Fund process. The appointment of technical panels by the bipartisan Social Security Advisory Board provides the panels with the independence and legitimacy they need in order to generate confidence in their work.

The 1999 Panel was composed of 12 distinguished actuaries, economists, and demographers. The Panel conducted its meetings over the period January – September 1999. In addition to examining and making recommendations on demographic and economic assumptions, the Technical Panel was charged by the Board to provide expert opinion on the implications of investment of Social Security monies in the equities market (by either the government or individuals), and to review forecasting methods, including alternative modeling methodologies that may best illustrate the probability of variation around the central projections.

The Technical Panel is expected to submit its report to the Advisory Board in November 1999. The Board will distribute the report to the Social Security Trustees, Members of Congress, officials of the Social Security Administration, other officials in the Federal government, and others who are interested in the Social Security system.

### ***C. Disability Programs***

From the Board's inception, the Social Security Disability Insurance (DI) and the Supplemental Security Income (SSI) disability programs have been an important area of attention for Board activities. Eighteen percent of Social Security and SSI benefits are based on disability, but two-thirds of the costs of administering the agency goes for them.

As the result of earlier studies, the Board issued a report in August 1998 on *How SSA's Disability Programs Can Be Improved*. The recommendations in the report focused on specific administrative improvements that the Board believes are fundamental to improving the way the disability programs operate. In its September 1999 report on service to the public the Board again emphasized the importance of improvements in the disability determination process. In addition to referring to specific actions that the agency should take, the Board expressed particular concern about the disunity that exists in the administration of the disability programs. It recommended that SSA's leadership take more effective steps to bring greater unity into the disability system. The Board also stated that it believed that the longstanding structural problems of the disability determination and appeals processes need to be reviewed by the agency, the Board, and the Congress.

As part of its continuing work on disability, in fiscal year 1999 the Board met with numerous Social Security officials in SSA's headquarters to discuss administrative and programmatic developments and problems. The Board also had a comprehensive review by SSA officials on the status of the agency's actions to implement the Board's recommendations for improvements in the disability determination process. In addition, the Board met with Administrative Law Judges and State Disability Determination Services Directors. The General Accounting Office provided the Board with the findings of a new study on SSA's Disability Process Redesign initiative.

The Board also met with officials involved in administering the disability programs during its visits to SSA's Dallas, New York, Atlanta, Kansas City, and Chicago regions. These officials included disability adjudicators, managers, and administrators from several State Disability Determination Services, and staff from SSA field offices, regional offices and the Office of Hearings and Appeals.

The disability programs continue to be a major focus of the Board's activities. The Board believes that the inherent complexity of these programs and their administration will require its on-going scrutiny.

#### ***D. Supplemental Security Income Program***

The law requires that the members of the Board, collectively or individually, be given the opportunity to include their views in SSA's annual report to the Congress on the Supplemental Security Income program. Reflecting the Board's extensive work on SSA's service to the public (referred to above), the Board's comments in SSA's May 1999 report addressed the issue of the quality of service that SSA provides to SSI claimants and beneficiaries. The Board noted that as a means-tested program, SSI is inherently more difficult to administer than the Social Security programs. The problems that SSA is having in serving SSI claimants and

beneficiaries are described in the Board's September 1999 report on service to the public. The report also includes detailed recommendations that respond to these problems.

In the SSI report, the Board indicated its concern about SSI payment accuracy and commended the agency for the steps it has been taking to improve the integrity of the SSI program. The Board also emphasized the importance of high quality work by SSA's field offices in assuring the accuracy and integrity of the program. The Board recommended that the agency carefully assess how well it is serving individuals who, because of old age, mental or physical disability, language barriers, or other causes, have special need of assistance in filing claims and otherwise complying with complex SSI eligibility rules. It recommended that the agency make the training and staffing improvements that are needed to assure that these individuals receive appropriate assistance. The Board expressed its support for the agency's plans to undertake a new effort to simplify complex SSI program rules and also urged the agency to take steps to address the complexity of procedural instructions that are sent to the field.

The Board noted the very large impact that the SSI program is having on the agency's disability determination process. It urged the agency to commit the resources that will be needed to move forward quickly to implement the recommendations that the Board made in its August 1998 report on *How SSA's Disability Programs Can Be Improved*. It also noted that if, as expected, the Congress enacts legislation to give disability applicants and beneficiaries greater access to rehabilitation and employment services, SSA will have substantial responsibilities in carrying out the new functions. The workload of the field offices will increase substantially and additional resources are likely to be needed.

The Board's comments were based on the work that it has been doing over the last three years on the subjects of disability and service to the public. During fiscal year 1999, the Board met with SSA staff to discuss the agency's systems infrastructure and how the agency expects to handle future growing workloads. Other subjects that the Board discussed with SSA staff include the process for contracting out certain agency workloads, the agency's current quality assurance activities and plans for future work, and the structure, current work, and future work of SSA's Office of Policy. As noted above, the Board held a public hearing in April 1999 at which it heard testimony from individuals representing SSI applicants and beneficiaries. The hearing provided useful information about the needs of the SSI population and the manner in which SSA is serving this vulnerable population.

The Board is cognizant that the SSI program remains on the list of programs that the General Accounting Office has designated as "high risk" because of vulnerability to waste, fraud, abuse, and mismanagement. SSA's Inspector General has also been looking at SSI program vulnerabilities. The Board has met with the GAO, with the Office of Inspector General, and with agency staff to discuss issues related to program integrity. The Board expects to continue its work on this issue in the future.

## ***E. Public Understanding of Social Security***

The Social Security Independence and Program Improvements Act of 1994 gave the Board the responsibility of “increasing public understanding of Social Security.” As part of its study of ways in which SSA could facilitate greater understanding of its programs, the Board has held a number of meetings with agency officials and others. A report, *Increasing Public Understanding of Social Security*, was issued in September 1997.

Following up on its earlier work, in fiscal year 1999 the Board met with agency officials to discuss the implementation of the new Social Security Statement (formerly the Personal Earnings and Benefit Estimate Statement) that the agency will be mailing to all workers over the age of 25, beginning October 1, 1999. Because of its universal distribution, this statement has the potential to be an extremely useful educational document. This statement of the individual earnings covered by Social Security and the projected benefits for each worker is an important source of information about the program in general and about how it affects them individually. In its September 1997 report the Board noted that SSA needed to improve both the content and format of the statement that it has been sending in the past in order to make it as useful, accurate, and readable as possible. The Board monitored the development of a revised statement and met with SSA staff to discuss the content and manner of presentation of the information in it. The Board expects to follow closely the agency’s implementation of the Social Security Statement.

In addition, as part of its study on how SSA can improve its service to the public, the Board held meetings with numerous managers and employees in SSA’s regional offices, field offices, teleservice centers, and program service centers. At many of these meetings, the Board heard the perspectives of employees regarding how well SSA is carrying out its responsibilities to educate the public on the programs administered by the agency. In its September 1999 report, *How the Social Security Administration Can Improve Its Service to the Public*, the Board discussed how downsizing has decreased SSA’s capacity to deliver public information services and perform other outreach activities. It urged the agency to address the issue of what needs to be done to ensure that local offices have the resources and the training needed to participate in public information activities in their communities that promote better understanding of Social Security programs.

## ***F. Policy Development, Research, and Program Evaluation***

The Board’s statutory mandate includes “making recommendations with respect to a long-range research and program evaluation plan for the Social Security Administration.” A major concern of the Board has been SSA’s lack of capacity in recent years for in-depth policy development, research, and program evaluation. The Board’s first report, *Developing Social Security Policy: How the Social Security Administration Can Provide Greater Policy*

*Leadership*, focused on this topic. The Board has also issued a second report, *Strengthening Social Security Research: The Responsibilities of the Social Security Administration*.

In these reports the Board made specific recommendations for strengthening SSA's policy development and research capacities. The Board recommended areas of research that the agency should address in order to help policy makers develop a comprehensive agenda for the future of the Social Security and Supplemental Security Income programs.

The agency has begun to implement a number of the Board's recommendations. It has created a new Office of Policy, which is headed by a Deputy Commissioner who reports directly to the Commissioner. It has hired additional staff in the areas of policy analysis and research. As the Board recommended, it has also taken steps to encourage research outside the agency. It has established a Retirement Research Consortium and has plans to establish a Disability Research Institute in the near future.

In its September 1999 report on service to the public, the Board noted that these steps represent substantial progress. In the area of policy, however, as in other areas of the agency's work, responsibilities continue to be dispersed across many components, making good communication and coordination of activities difficult to achieve. The Board observed that ambiguities remain between the role of the Office of Policy and other components of the agency that retain policy responsibilities, including the Office of Disability, the Office of the Chief Actuary, and the Office of Legislation and Congressional Affairs. The Board recommended that the agency clarify the roles and relationships of these offices.

The Board will continue its close monitoring of the work of the agency in the areas of policy development and research.

## IV. Board Operations and Communications

**Meetings**—In fiscal year 1999, the Board met 10 times for the purpose of gathering and evaluating information and drafting its report regarding how the Social Security Administration can improve its service to the public.

**Public Hearings**—The Board conducted one public hearing. In April 1999, in Chicago, the Board heard testimony from members of the public and organizations that represent populations served by the Social Security Administration to assess the quality of service that the Social Security Administration delivers to the public and to hear ideas for improvements in service delivery.

**Publications**—During 1999, the Board issued 2 reports: *Annual Report Fiscal Year 1998*; and *How the Social Security Administration Can Improve Its Service to the Public*.

**Forum**—In October 1998, the Board sponsored a forum on the implications of raising the Social Security retirement age. An account of the proceedings, entitled *Forum on the Implications of Raising the Social Security Retirement Age*, is posted on the Board's web site.

**Technical Panel on Assumptions and Methods**—The Board appointed a Technical Panel to review the assumptions and methods used by the Board of Trustees of the Old-Age, Survivors, and Disability Insurance Trust Funds to project the future financial status of the funds. The Panel began work in January 1999 and is expected to issue its report in November 1999.

**Testimony**—On November 19, 1998 the Chair provided testimony for the House Committee on Ways and Means hearing on "Saving Social Security." He discussed the Board's report, *Social Security: Why Action Should Be Taken Soon*, which explains the advantages of taking action sooner rather than later to address the long-range Social Security solvency problem. The Chair expressed the Board's belief in a bipartisan approach to Social Security. He also discussed the work of the Board with respect to policy development, increasing public understanding of Social Security, strengthening research and program evaluation, service to the public, and disability.

## **V. Board Visits to Field Sites in 1999**

1. Chicago, Illinois, April 14-15, 1999

The Board met with officials and staff of the Regional Office, Area Directors, managers and employees of field offices, the Regional Chief Administrative Law Judge, Directors from several State Disability Determination Services, Program Service Center managers and employees, SSA union representatives, an official from the Office of the Regional Chief Counsel, and managers and staff of a Teleservice Center to discuss SSA's service to the public.

The Board also held a public hearing on how the Social Security Administration can improve its service to the public.

2. Kansas City, Missouri, and Kansas City, Kansas, April 12-13, 1999

The Board met with officials and staff of the Regional Office, State Directors, managers and employees of field offices, the Regional Chief Administrative Law Judge, managers and staff from the Program Service Center, the Regional Chief Counsel, an official from the Office of Inspector General, SSA union representatives, staff from the Disability Program Operations Center, and managers and staff of a Teleservice Center to discuss SSA's service to the public.

3. New York, New York, March 1, 1999

The Chair and members of the staff met with managers and employees of field offices to discuss SSA's service to the public.

4. Miami and Fort Lauderdale, Florida, February 10-11, 1999

The Board met with State Directors, managers and employees of field offices, staff from the Florida State Disability Determination Services, SSA union representatives, employees from Dade County and Jackson Memorial Hospital, and managers and staff of a Teleservice Center to discuss SSA's service to the public.

5. Atlanta, Georgia, February 9-10, 1999

The Board met with officials and staff of the Regional Office, Area Directors, managers and employees of field offices, officials from the Regional Hearing Office and the Office of the Inspector General, the Regional Chief Counsel,

Program Service Center managers and employees, and managers and staff of a Teleservice Center to discuss SSA's service to the public.

6. New York, New York, December 14-15, 1998

The Board met with officials and staff of the Regional Office, Area Directors, managers and employees of field offices, the Regional Chief Administrative Law Judge and other officials in the Regional Hearing Office, Program Service Center managers and employees, and managers of regional Teleservice Centers to discuss SSA's service to the public.

## VI. Reports and Publications

1. *How the Social Security Administration Can Improve Its Service to the Public*, September, 1999.
2. *Forum on the Implications of Raising the Social Security Retirement Age*, May 1999 (Staff document).
3. “Statement on the Supplemental Security Income Program,” Additional Statement by the Social Security Advisory Board in the *Annual Report of the Supplemental Security Income Program*, Social Security Administration, May 1999.
4. *Annual Report Fiscal Year 1998*, October 1998.
5. *How SSA’s Disability Programs Can Be Improved*, August 1998.
6. *Social Security: Why Action Should Be Taken Soon*, July 1998.
7. “Statement on the Supplemental Security Income Program,” Additional Statement by the Social Security Advisory Board in the *Annual Report of the Supplemental Security Income Program*, Social Security Administration, May 1998.
8. *Strengthening Social Security Research: The Responsibilities of the Social Security Administration*, January 1998.
9. *Increasing Public Understanding of Social Security*, September 1997.
10. *Forum on a Long-Range Research and Program Evaluation Plan for the Social Security Administration: Proceedings and Additional Comments*, June 24, 1997 (Staff document).
11. *Developing Social Security Policy: How the Social Security Administration Can Provide Greater Policy Leadership*, March 1997.

Reports are available on the Board’s web site at [www.ssab.gov](http://www.ssab.gov)



## **VII. Members of the Board**

### ***Stanford G. Ross, Chair***

Stanford Ross is a partner in the law firm of Arnold & Porter, Washington, D.C. He has dealt extensively with public policy issues while serving in the Treasury Department, on the White House domestic policy staff, as Commissioner of Social Security, and as Public Trustee of the Social Security and Medicare Trust Funds. He is a Founding Member and a former Director and President of the National Academy of Social Insurance. He has provided technical assistance on Social Security and tax issues under the auspices of the International Monetary Fund, World Bank, and U.S. Treasury Department to various foreign countries. He has taught at the law schools of Georgetown University, Harvard University, New York University, and the University of Virginia, and has been a Visiting Fellow at the Hoover Institution, Stanford University. He is the author of many papers on Social Security and Federal taxation subjects. Term of office: October 1997 to September 2002.

### ***Jo Anne Barnhart***

Ms. Barnhart is a political consultant and public policy consultant to State and local governments on welfare and social services program design, policy, implementation, evaluation, and legislation. From 1990 to 1993 she served as Assistant Secretary for Children and Families, Department of Health and Human Services, overseeing more than 65 programs, including Aid to Families with Dependent Children, the Job Opportunities and Basic Skills Training program, Child Support Enforcement, and various child care programs. Previously, she was Minority Staff Director for the U.S. Senate Committee on Governmental Affairs, and legislative assistant for domestic policy issues for Senator William V. Roth. Most recently, Ms. Barnhart served as Political Director for the National Republican Senatorial Committee. First term of office: March 1997 to September 1998; current term of office: October 1998 to September 2004.

### ***Lori L. Hansen***

Ms. Hansen is a Consulting Policy Analyst for the National Academy of Social Insurance. She served as a Policy Analyst for the Study Group on Social Security. She was a Technical Assistant to former Social Security Commissioner Robert Ball in his capacity as a member of the National Commission on Social Security Reform. She was also a Special Assistant to the President and Director of Government Affairs at the Legal Services Corporation. In addition, Ms. Hansen was a senior professional staff member on the U.S. Senate Committee on Labor and Human Resources, Subcommittee on Employment, Poverty, and Migratory Labor, and was legislative assistant to Senator Gaylord Nelson, then Chairman of the Subcommittee on Social Security of the Senate Committee on Finance. She also served on the professional staff of the Senate Select Committee on Nutrition and Human Needs. Term of office: October 1994 to September 2000.

### ***Martha Keys***

Martha Keys served as a U.S. Representative in the 94<sup>th</sup> and 95<sup>th</sup> Congresses. She was a member of the House Ways and Means Committee and its Subcommittees on Health and Public Assistance and Unemployment Compensation. Ms. Keys also served on the Select Committee on Welfare Reform. She served in the executive branch as Special Advisor to the Secretary of Health, Education, and Welfare and as Assistant Secretary of Education. She was a member of

the 1983 National Commission (Greenspan) on Social Security Reform. Martha Keys is currently consulting on public policy issues. She has held executive positions in the non-profit sector, lectured widely on public policy in universities, and served on the National Council on Aging and other Boards. Ms. Keys is the author of *Planning for Retirement: Everywoman's Legal Guide*. First term of office: November 1994 to September 1999; current term of office: October 1999 to September 2005.

***Sylvester J. Schieber***

Mr. Schieber is Director of the Research and Information Center at Watson Wyatt Worldwide, where he specializes in analysis of public and private retirement policy issues and the development of special surveys and data files. From 1981 to 1983 Mr. Schieber was the Director of Research at the Employee Benefit Research Institute. Earlier, he worked for the Social Security Administration as an economic analyst and as Deputy Director at the Office of Policy Analysis. Mr. Schieber is the author of numerous journal articles, policy analysis papers, and four books including: *Retirement Income Opportunities in An Aging America: Coverage and Benefit Entitlement*; *Social Security: Perspectives on Preserving the System*; and *The Real Deal: The History and Future of Social Security*. He served on the 1994-1996 Advisory Council on Social Security. He received his Ph.D. from the University of Notre Dame. Term of office: January 1998 to September 2003.

***Members of the Staff***

*Margaret S. Malone, Staff Director*

*Joyce Manchester  
Beverly Rollins  
George Schuette  
Wayne Sulfridge  
Jean Von Ancken  
David Warner*



Social Security Advisory Board  
400 Virginia Avenue, SW  
Suite 625  
Washington, D.C. 20024  
Tel: (202) 475-7700  
Fax: (202) 475-7715

Website: [www.ssab.gov](http://www.ssab.gov)