

Social Security Advisory Board

# Annual Report

Fiscal Year 2000

October 2000

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## **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. In addition, we have testified on important issues before the Congress, and we have met with Social Security employees across the country to hear their concerns and recommendations about the future of the programs and the agency.

This is the third 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, Chairman*

*Jo Anne Barnhart      Lori L. Hansen*

*Martha Keys      Sylvester J. Schieber*

# **Social Security Advisory Board Annual Report Fiscal Year 2000**

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

### **II.**

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.

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

## **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, as described below.

#### ***A. Disability Programs***

From the Board's inception, the Social Security Disability Insurance (DI) and the Supplemental Security Income (SSI) disability programs have been a primary focus of the Board's work. These programs have grown steadily over the years to the point where in fiscal year 2001 they are expected to account for about \$90 billion in Federal spending, or nearly five percent of the Federal budget. About two-thirds of the agency's administrative budget is spent for disability work and in terms of executive management time and concerns, the programs appear to consume even more of the resources of the agency than these numbers suggest.

As a result of earlier studies, the Board issued two reports germane to the disability programs. In August 1998, the Board issued a report entitled *How SSA's Disability Programs Can Be Improved*. The recommendations in this report focused on specific administrative improvements that the Board believes are fundamental to improving the way the disability programs operate, including developing a single presentation of disability policy that is binding on all decision makers, developing and implementing an on-going joint training program for all adjudicators, and strengthening the agency's program policy staff so that it can perform basic functions, such as updating the medical listings and vocational standards that are used in evaluating whether an individual is disabled.

In September 1999, the Board issued an additional report entitled *How the Social Security Administration Can Improve Its Service to the Public*. In this report, the Board noted that some of the agency's most serious service delivery problems are in the area of disability. In addition to outlining specific actions that the agency should take to address these problems, the Board recommended that the agency's leadership take steps to bring greater administrative unity and teamwork into the disability system. The Board also observed that longstanding structural problems of the disability determination and appeals processes should be reviewed by the agency, the Board, and the Congress.

Beginning in the fall of 1999, SSA began implementing a number of changes in the disability determination process in 10 "prototype" States. The agency expects to extend these changes to the rest of the country over the next few years. The prototype initiative includes offering individuals whose claims may be denied an opportunity to have a pre-decisional conference with the individual who will make the disability determination. In addition, disability examiners in the State agencies act as single decision makers; the opinion of a physician is not required in order to make a determination except in certain cases. Also within the 10 prototype States, SSA is using its quality assurance system to enforce the implementation of "process unification" rulings issued by the agency in 1996. These rulings were designed to provide uniform policy guidance for State agency adjudicators and administrative law judges. In addition, in January 2000 the agency began the first phase of national implementation of a hearing process improvement initiative (HPI). The HPI initiative is intended to improve case processing in SSA's hearing offices by using a team approach and shared accountability.

The Board has been actively monitoring the implementation of these initiatives. In fiscal year 2000 we met with numerous officials from SSA's headquarters to discuss administrative and policy issues related to the prototype and policy unification initiatives. We consulted as well with officials of the Office of Hearings and Appeals and with administrative law judges (ALJs) on the impact of the HPI initiative and other issues related to the disability appeals process.

Over the last year our study has also included site visits to Detroit and Lansing, Michigan; Brooklyn, New York; Harrisburg, Pennsylvania; Los Angeles and Oakland, California; Baton Rouge and New Orleans, Louisiana; and Birmingham, Alabama. On these visits we met with DDS administrators, supervisors, examiners, quality assurance and training staff and other DDS employees, as well as with ALJs and other hearing office employees. The Board also discussed disability issues with officials in the SSA Regional Offices in New York and California. In addition, the Board conferred with former SSA executives and managers, disability advocates, field office managers, DDS administrators, union officials, and representatives from the National Association of Disability Examiners.

In addition, the Board has been monitoring the implementation of the new Ticket to Work program, the agency's research and evaluation efforts in the area of employment support, and the status of the agency's National Study of Health and Activity and the new Disability Research Institute.

In September 2000, the Board issued a report entitled Selected Aspects of Disability Decision Making. This report includes extensive data on the operation of the disability programs, much of which is not routinely available to the individuals in SSA and the DDSs who are responsible for the administration of these programs. These data raise questions about consistency and equity in decision making that we believe need to be addressed. Over the years many reasons have been put forth to explain differences in decision making among State agencies, between State agencies and ALJs, and over time. However, as we note in this report, SSA currently has no mechanism in place to provide consistent and reliable information on the extent to which the variations may represent a failure to apply program policies and procedures on a uniform basis throughout the country and throughout the disability system.

We believe that clarifying the issue of horizontal equity, that is, whether similarly situated individuals are receiving similar treatment, is essential to evaluating the fairness and effectiveness of the administrative structure of the disability programs. It is also essential to evaluating the program from the standpoint of the contributors and taxpayers who pay the costs of the program. In this report, we recommend that SSA develop and implement a new quality assurance and management information system that will enable the agency to properly guide disability policy and procedures. We believe such a system is also necessary to provide ongoing evaluation of initiatives such as process unification and prototype.

The Board expects to issue another report on the disability programs early in the year 2001. This report will draw upon the Board's extensive studies of the disability programs over the previous four years. Its purpose will be to advise the new Congress and the new Administration on the major policy issues that confront the disability programs and the options for addressing them.

### ***B. Service to the Public***

When legislation was enacted in 1994 establishing the Social Security Administration as an independent agency and creating an independent 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 three years, the Board has made responding to that charge one of its highest priorities. Much of the Board's attention has been focused on how SSA is currently meeting its extensive public service demands and how its service can be improved. In its September 1999 report, How the Social Security Administration Can Improve Its Service to the Public, the Board finds that SSA's capacity to serve the public is not as strong as it should be and changes are urgently needed. The report includes specific recommendations for the kinds of changes that we believe need to be made.

The Board believes that the agency's service delivery problems stem from a combination of factors, including a prolonged period of downsizing, a growing workload, and increasing program complexity. Moreover, the agency will face additional challenges over the coming decade as the "baby boom" generation approaches retirement and enters the years for increased likelihood of disability. The combination of growth in these workloads and 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 addition, the Board noted that the agency has a number of service delivery problems that need immediate attention. In particular, SSA's telephone service is inadequate, with too many callers unable to get prompt service either from the agency's 800 number or from field offices. Many who visit one of SSA's 1,300 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 benefit rolls.

On February 10, 2000 the Advisory Board presented testimony before the Social Security Subcommittee of the House Ways and Means Committee at a hearing on SSA's readiness for the impending wave of "baby boomer" beneficiaries. The Board's report, *How the Social Security Administration Can Improve Its Service to the Public*, was a major focus of the hearing. In addition to outlining the changes the agency needs to make to improve service, Chairman Ross emphasized the need for the Administration and the Congress to provide the funds the agency needs to provide high quality service to the public.

SSA has begun to take steps to respond to the recommendations in the Board's September 1999 report. In September 2000, the agency issued a "2010 Vision" report describing how it will serve its customers in the year 2010. The Board participated in two conferences that led up to the issuance of the report. Speaking to the conference, the Chairman stressed the Board's view that development of a service delivery plan, both for the short term and the long term, is critical to the future of the agency. He noted that the 2010 Vision initiative is an important first step in the planning process.

To further assist SSA in strengthening its ability to serve the public, the Board has worked with the agency to sponsor a forum on the measurement of customer service expectations and needs. At the present time, SSA has very little data that it can use to identify its most serious service delivery deficiencies and determine what it should do to improve service. The purpose of the forum, was to bring together a panel of experts from the private sector to discuss with the Board and the leadership of the agency how successful private sector companies measure customer service and use this information to improve service delivery. The Board will issue a report on the forum that will discuss recommendations for future action by the agency.

Early in 2001 the Board plans to issue an additional report on service to the public aimed at helping the new Congress and the new Administration to identify and address important service delivery issues.

### ***C. Administrative Resources***

In a series of public statements, the Board has emphasized its view that SSA cannot sustain any further reductions in its staff and in fact now faces staffing shortages in key parts of the organization. We believe that staffing levels in the agency have been dictated largely by budget and personnel goals that have not seriously considered the agency's workload and how it is changing in terms of volume and complexity. The 1994 legislation making SSA an independent agency called for the development of a comprehensive workforce plan that would clarify the agency's human resource needs. We understand that preliminary work on developing a workforce plan may be underway. We hope that in the future SSA's requests for appropriations will reflect the needs of the agency as identified in its workforce plan.

Throughout fiscal year 2000 in a number of forums the Board has supported increased administrative resources for SSA and the institution of a workload-based budget for the agency. We have also recommended excluding SSA's administrative budget from the statutory cap that imposes an arbitrary limit on the amount of discretionary government spending. Letters were sent to Members of the Appropriations Committees in both the House and the Senate, as well as to the House and Senate leadership, stressing the urgent need of the agency for additional resources. Chairman Ross submitted testimony to the Subcommittee on Labor, Health and Human Services and Education of the House Appropriations Committee urging the Subcommittee to act favorably on the budget the Commissioner submitted to the Congress for 2001 and observing that in the view of the Board, even more resources were needed than the Commissioner had proposed.

The Commissioner's budget requested a funding level that, among other improvements, would enable the agency to improve its 800 number telephone service by handling more calls faster and speed up the disability claims process by adjudicating more claims in the State agencies and allowing hearings to be held more promptly. The Board strongly supports these improvements and, indeed, we believe that additional service improvements, as outlined in our report on service to the public, are needed. The Board has strongly urged the agency to be candid both within and outside of the organization, not only about its problems, but also about its needs.

### ***D. Long-Range Financing***

In July 1998, the Board issued a report, *Why Action Should be Taken Soon*, that 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 it is important to make these changes sooner rather than later. This report has been widely used by Congressional

offices and by SSA's employees in the field to explain the financing issues to the public. It was also used at the December 1998 White House Conference on Social Security.

In January 1999, the Board convened the 1999 Technical Panel on Assumptions and Methods – the first established by the Board since its creation and the first since 1995. In the past such panels have been appointed by the Social Security Advisory Councils, which were appointed every four years under a previous provision of law. However, this provision was repealed by the 1994 legislation that created the Advisory Board. The Advisory Board has taken on the responsibility for the appointment of future panels.

The charter that the Board gave the 1999 Technical Panel directed the Panel to review the assumptions and methodology 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 was asked to review key economic and demographic assumptions, to provide expert opinion regarding expected growth in equity markets and effects of possible investments of Social Security funds on equity markets and the national economy, and to review current forecasting methods.

The 1999 Panel was composed of 12 distinguished actuaries, economists, and demographers. It conducted its meetings over the period January-September 1999 and submitted its report to the Board in November 1999. The Board published the Panel's report in order to make its findings and recommendations readily available to the public, the Congress, and the Social Security Trustees. The Board did not take a position on the Panel's findings and recommendations.

Regarding the demographic and economic assumptions, the Panel's principal recommendations for change concerned the rate of mortality decline, the real wage differential, and the return on government securities. The Panel also made recommendations on the assumptions regarding the rate of return on equity investment, on the manner of presentation of information in the Trustees' report, and on methodologies and models used to make projections.

On January 12, 2000, the Board sponsored a one-day forum on "Projecting the Future of Social Security" which dealt with many of the issues raised in the Technical Panel's report. The forum brought together Panel members and other experts to conduct in-depth discussions concerning stock market investment of Social Security funds, projected trends in economic well being, and demographics in the next century. Those who attended the conference included academic experts, government officials, Congressional staff, members of the press, and other interested individuals.

### ***E. 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 (SSI) program. The Board's comments on SSA's May 2000 report focused on two particular areas that we believe need special attention by the agency: (1) the need to do a better job of measuring the service needs of SSI claimants and beneficiaries, and (2) integrating SSI program integrity and quality of service.

Although SSA has some data that identify service satisfaction levels for the SSI population as a whole, it does not systematically collect and use data on the needs, expectations, or service satisfaction levels for large and important segments of the SSI population – the aged, the disabled, those who are working, disabled children, or those with specific types of impairments, such as mental impairments. It also lacks data that present a picture of client needs or satisfaction with specific aspects of the agency's responsibilities – performance in field offices, State disability agencies, or the Office of Hearings and Appeals. The Board recommended that the agency collect these data and use them to improve its service to the SSI population.

In visits to field offices across the country, the Board heard from many employees that, because of resource limitations and pressures to process work quickly, they sometimes do not have the time to handle claims as carefully as they think they should. We have heard similar concerns from employees of State disability agencies. Downsizing and the accompanying reduction in the number of managers in the field have led to a decline in the amount of review, training, and mentoring.

The agency conducts two types of reviews to find and correct errors in payments to SSI beneficiaries. Over the last decade it has been conducting annually between 1.5 to more than 2 million redeterminations of eligibility that do not involve disability factors. In addition, over the 7-year period 1996-2002, it has set a goal of conducting more than 3.5 million reviews of the disability status of SSI beneficiaries. The agency has also supported expanded program integrity efforts by the Office of Inspector General.

Although we commend the agency for these important efforts, we believe they should go hand-in-hand with increased emphasis on careful handling of claims at the front end of the process, including more careful interviewing, better training, and increased monitoring for quality. We understand that this will require additional resources for the agency, particularly in field offices and State disability agencies where resources are already stressed beyond capacity. As noted earlier in this report, we have recommended that SSA improve its quality assurance system. The agency needs to provide sufficient staff to ensure that quality review of SSI workloads is conducted appropriately.

During fiscal year 2000, the Board discussed with SSA officials the agency's plans for research and evaluation activities in the areas of the evaluation of SSI children and SSI program simplification.

### ***F. Use and Misuse of Social Security Numbers***

Over the course of the Board's work, we have become increasingly concerned about the growing incidence of identity-related crimes, most of which involve use of an individual's Social Security number. We have been examining both the authorized and unauthorized uses of Social Security numbers, vulnerabilities in SSA's enumeration process, and the role that Social Security numbers play in identity-related crimes.

Over the last year, the Board has discussed with the Inspector General the role of the Social Security Administration in addressing the problem of the misuse of Social Security numbers. The Board has also consulted with executives from the Consumer Protection Bureau of the Federal Trade Commission on the role that Social Security numbers play in identity theft and other identity-related crimes. The Board intends to follow up on this preliminary work in the coming year.

### ***G. 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 Policy Leadership*, focused on this topic. The Board 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 and has contracted with outside entities to establish a Retirement Research Consortium and a Disability Research Institute.

During fiscal year 2000, the Board was briefed by SSA's Office of Policy on current and upcoming research and evaluation activities in the areas of retirement income modeling, return to work evaluations and demonstrations, the National Study of Health

and Activity, the Retirement Consortium, the Disability Institute, the evaluation of SSI children, SSI program simplification, and access to SSA's data by outside researchers.

In its September 1999 report, *How the Social Security Administration Can Improve Its Service to the Public*, the Board commended the agency for the steps it has taken. We continue to be concerned, however, that in the area of policy, as in other areas of the agency's work, responsibilities continue to be dispersed across many components. 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.

### III. Board Operations and Communications

Meetings In fiscal year 2000, the Board met nine times and made four site visits for the purpose of gathering and evaluating information on the operation of the disability programs and other aspects of SSA's service to the public.

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 issued its report in November 1999.

Forum On January 12, 2000 the Board sponsored a forum on projecting the future of Social Security, which dealt with many of the issues raised in the Technical Panel report.

Publications During 2000, the Board issued two reports: *Selected Aspects of Disability Decision Making and Annual Report Fiscal Year 1999*. It also published the report to the Board of the 1999 Technical Panel on Assumptions and Methods.

Testimony On February 10, 2000 Chairman Ross and Sylvester Schieber presented testimony to the Education Social Security Subcommittee of the House Ways and Means Committee that examined SSA's readiness for the impending wave of "baby boomer" beneficiaries. They discussed the Board's report, *How The Social Security Administration Can Improve Its Service to the Public*. On April 5, 2000, the Chairman presented testimony for the record before the Subcommittee on Labor, Health and Human Services and Education of the House Appropriations Committee. At both hearings, the Board's report, *How The Social Security Administration Can Improve Its Service to the Public*, was discussed. The Board's testimony discussed SSA's need for additional administrative resources and recommended that SSA's administrative budget be removed from under the discretionary budget caps.

#### **IV. Visits to Field Sites in 2000**

1. Detroit, Michigan, and Lansing, Michigan, October 18-19, 1999

The Board met with officials and staff of the Michigan Disability Determination Service offices in both Detroit and Lansing, including the Director, senior management staff, disability examiners, quality assurance staff, medical staff, training staff and support staff to discuss SSA's disability prototype and process unification initiatives. In addition, the Board met with the Chief Administrative Law Judge in the Lansing Hearing Office, with other ALJs, and with hearing office staff to discuss the agency's hearing process improvement initiative (HPI).

2. New York, New York, January 6-7, 2000

The Board met with officials and staff of the New York Division of Disability Determinations, including the Director, senior managers, systems staff, training staff, and disability examiners to discuss implementation of the prototype and process unification initiatives. The Board visited State disability offices in Manhattan and Brooklyn. The Board also met with the Chief ALJ, other ALJs, and hearing office managers and other staff in the Brooklyn Hearing Office to discuss implementation of HPI. In addition, the Board met with senior officials in SSA's New York Regional Office and the Regional Chief ALJ to discuss the prototype, process unification, and HPI initiatives.

3. Harrisburg, Pennsylvania, March 6, 2000

The Board staff met with officials and staff of the Pennsylvania Bureau of Disability Determination in Harrisburg, including the Director, senior managers, quality assurance staff, training staff, medical staff and disability examiners to discuss implementation of the prototype and process unification initiatives. In the Harrisburg Hearing Office, the Board staff also met with the Chief ALJ, other ALJs, and hearing office managers and other staff to discuss implementation of the HPI initiative.

4. Los Angeles, Pasadena, Downey, and Oakland, California, May 21-25, 2000

The Board met with officials and staff of the California Disability and Adult Programs Division in Los Angeles and Oakland, including the Director, executive management staff, team managers, quality assurance staff, training staff, medical relations staff, customer service staff, medical consultants, and disability examiners to discuss implementation of the prototype and process unification initiatives. In the Pasadena and Downey Hearing Offices, the Board met with the Chief ALJs, other ALJs and hearing office managers and staff to discuss

implementation of the HPI initiative. In addition, the Board met with SSA's San Francisco Regional Office staff to discuss these initiatives.

5. Baton Rouge, Metairie, and New Orleans, Louisiana; and Birmingham, Alabama, July 10-12, 2000

The Chairman and members of the staff met with officials and staff of the Louisiana and Alabama Disability Determination Services in Baton Rouge and Metairie, Louisiana and in Birmingham, Alabama, including the Directors, senior management, medical staff, quality assurance staff, training staff and disability examiners to discuss implementation of the prototype and process unification initiatives. In the New Orleans Hearing Office and the Birmingham Hearing Office, the Board met with the Chief ALJs, other ALJs and hearing office managers and staff to discuss implementation of the HPI initiative.

6. Wilmington, Delaware, August 14, 2000

The Board staff met with officials in the Wilmington field office and in the Delaware Disability Determination Services to discuss the new electronic disability claims "collect module" of the disability processing system that Delaware is piloting.

## V. Reports and Publications

1. *Selected Aspects of Disability Decision Making*, September 2000.
2. *The Technical Panel on Assumptions and Methods*, Report to the Social Security Advisory Board, November 1999.
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 2000.
4. *Annual Report Fiscal Year 1999*, October 1999.
5. *How the Social Security Administration Can Improve Its Service to the Public*, September, 1999.
6. *Forum on the Implications of Raising the Social Security Retirement Age*, May 1999 (Staff document).
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 1999.
8. *Annual Report Fiscal Year 1998*, October 1998.
9. *How SSA's Disability Programs Can Be Improved*, August 1998.
10. *Social Security: Why Action Should Be Taken Soon*, July 1998.
11. "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.
12. *Strengthening Social Security Research: The Responsibilities of the Social Security Administration*, January 1998.
13. *Increasing Public Understanding of Social Security*, September 1997.
14. *Forum on a Long-Range Research and Program Evaluation Plan for the Social Security Administration: Proceedings and Additional Comments*, June 24, 1997 (Staff document).
15. *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)

## **VI. Members of the Board**

### ***Stanford G. Ross, Chairman***

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. Ms. Hansen was also a Special Assistant to the President and Director of Government Affairs at the Legal Services Corporation. In addition, she 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 94th and 95th 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 several 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*

*Michael Brennan*

*Beverly Rollins*

*George Schuette*

*Wayne Sulfridge*

*Jean Von Ancken*

*David Warner*