

**Social Security Advisory Board  
Minutes  
Board Meeting  
May 7-8, 2013**

**Location:** Charlotte, North Carolina  
Birmingham, Alabama

**Time:** 8:00 a.m. – 1:00 p.m. (May 7)  
8:00 a.m. – 4:00 p.m. (May 8)

**SSAB Members:** Barbara Kennelly, Acting Chair  
Bernadette Franks-Ongoy  
Jagadeesh Gokhale  
Dorcas Hardy

**SSAB Staff:** Debi Sullivan, Staff Director  
Claire Green, Deputy Staff Director  
Jackie Chapin  
Jeremy Elder  
Joel Feinleib  
Jodi Vican  
David Warner  
Sarah Weaver, Staff Intern

**Participants**

**TIAA-CREF:** **Cathy McCabe**, Managing Director, Institutional Relationships  
**Christopher Spence**, Director, Government Relations  
**Morgan Gold**, Vice President, Institutional Marketing  
**Jack Florea**, Vice President, Institutional Marketing  
**Peter Case**, Managing Director, Operations  
**Cathy Ivey-Brady**, Director, National Contact Center  
**Omar Saxton**, Director, IT Infrastructure  
**Jeff Reid**, Vice President, Digital Marketing/Channels

**SSA Representatives:** **Michael Grochowski**, Regional Commissioner  
**Samara (Sam) Richardson**, Acting Assistant Regional Commissioner  
for Management, Operations, and Support  
**Patti Patterson**, Regional Communications Director **Rose Mary  
Buehler**, Assistant Regional Commissioner for Processing Center  
Operations  
**Frankie Hall**, Deputy Assistant Regional Commissioner for Processing  
Center Operations  
**Tom Baydala**, Operations Support Branch Chief  
**Annie Cottrell**, Disability Processing Branch Chief  
**Vernita Walker Gillam**, Deputy Operations Support Branch Chief  
**Mattie Akins**, Operations Manager  
**Carmen Joy**, Project Officer, Processing Center Operations  
**Jim Callahan**, Executive Officer, Processing Center Operations

**Tim Hollie**, Staff Advisor, Processing Center Operations  
**Joy Edson**, Staff Advisor, Processing Center Operations  
**Judge Ollie (Dockie) Garmon**, Atlanta Regional Chief Administrative Law Judge, Office of Disability Adjudication and Review  
**Judge Edward Zanaty**, Hearing Office Chief Administrative Law Judge, Birmingham Office of Disability Adjudication and Review  
**Eva Billingsley**, Hearing Office Director, Birmingham Office of Disability Adjudication and Review  
**Robert Raines**, Director, Office of Quality Performance  
**Gavin Lane**, Deputy Director, Office of Quality Performance  
**Donna Carmichael**, Branch Chief, Assistance and Insurance Program Quality Branch (Birmingham)  
**Carmen Wormely**, Director, Teleservice Center  
**Reggie Jenkins**, Deputy Director, Teleservice Center  
**Howard Garrison**, Alabama Area Director  
**Marilyn Thompson**, Director, Office of Civil Rights & Equal Employment Opportunity  
**Michael Bell**, District Manager, Birmingham Downtown

#### **Employee Groups**

**Celestine Hood**, Disability Processing Specialist, Southeastern Program Service Center  
**Noel Fendlason**, Claims Authorizer, Southeastern Program Service Center  
**Mark McPherson**, Teleservice Representative, Southeastern Program Service Center  
**Jose Munoz**, Teleservice Representative, Teleservice Center  
**Judge Michael Brownfield**, Local Association of Administrative Law Judges (AALJ) Representative, Office of Disability Adjudication and Review  
**Rhonda Miller**, Social Insurance Specialist, Office of Quality Performance  
**Bryan Green**, Social Insurance Specialist, Office of Quality Performance  
**Justin Davis**, Claims Representative, Birmingham Field Office  
**Nicole Young**, Technical Expert, Birmingham Field Office  
**Will Roca**, IT Specialist, Regional Office Claims Authorizer  
**Harold Naves**, Executive Assistant, Office of Civil Rights & Equal Employment Opportunity

**Jason Denenny**, Benefit Authorizer, Southeastern Program Service Center  
**Christie Janey**, Benefit Authorizer, Southeastern Program Service Center  
**Angela Jones-Garrett**, Benefit Authorizer, Southeastern Program Service Center  
**Bianca Cantrell**, Teleservice Representative, Teleservice Center  
**Pamela Ward**, Teleservice Representative, Teleservice Center  
**Susan Nadell**, Lead Legal Assistant, Office of Disability Adjudication and Review

**Eual Holland**, Social Insurance Specialist, Office of Quality Performance

**Leigh Slay**, Social Insurance Specialist, Office of Quality Performance

**Jay Sigler**, Claims Representative, Birmingham Field Office

**Allison Stanley**, Service Representative, Birmingham Field Office

**Michael Shipley**, Facilities Specialist, Regional Office Center for Materiel Resources

**Tykee Jackson**, Labor Management Relations Specialist, Regional Office Center for Human Resources

In May, the Advisory Board visited Charlotte, North Carolina and Birmingham, Alabama for a series of meetings over a two-day period. On Tuesday, the Board met with TIAA-CREF employees at their Charlotte, North Carolina campus. In the morning, TIAA-CREF executives Catharine McCabe and Christopher Spence provided introductions, opening remarks, and gave a brief historical background on TIAA-CREF as well as the many services the company offers its clients. After that, Morgan Gold and Jack Florea met with the Board to discuss TIAA-CREF's retirement readiness strategies. Specifically, they explained how TIAA-CREF measures the degree to which a participant is on track to retire with sufficient lifetime income, while at the same time maintaining a preferred standard of living. This involves segmentation of clientele into multiple variables (such as age, gender, and life stages) as well as an integrated communication, education, and personalized advice program capable of driving actionable results.

After morning presentations, Peter Case, Cathy Ivey-Brady, and Omar Saxton lead the Board through several tours of the TIAA-CREF facility. Peter Case gave the Board a tour of TIAA-CREF's Operations & Administration department where the Board met with several employees involved in the handling and processing of claims as well as various post-entitlement workloads. Next, Ms. Ivey-Brady gave the Board a tour of TIAA-CREF's National Contact Center followed by a presentation of operation. The tour and presentation encompassed an in-depth look into many of the company's telephone counseling services that are offered to clients. Lastly, Mr. Saxton led the Board on a systems and data security tour through the company's highly secure Data & Command Center. During lunch, Vice President of Marketing Jeff Reid met with the Board and gave a demonstration on the digital strategies that were used in designing the company's website.

On Wednesday, the Board visited met with Social Security Administration (SSA) executives at the agency's Birmingham Social Security Center (BSSC). The BSSC is unique in that it houses several different agency components under one "roof." These include the Southeastern Program Service Center (SEPSC) and Regional Office of Quality Performance as well as the Birmingham, Teleservice Centers (TSCs), and Hearing Office. In the morning, the Board met with agency representatives from the SEPSC. During the meeting, managers provided background information on PSC workloads as well as the multiple roles they play in the agency today. Employees shared with us the challenges the PSCs face in delivering adequate public service as well as their insights into how PSCs, and the agency as a whole, can be improved. After a tour of the BSSC facility, the Board met with several managers from the components co-located in the BSSC for a working lunch. This meeting allowed the Board an inside view into how the various components within the BSSC work together, as well as the many advantages associated with this co-location

In the afternoon, the Board met in discussion groups with a cross section of SSA employees. These included employees working in the Field Office, TSC, SEPSCs, the Hearing Office, and the Office of Quality Performance (OQP). These conversations were particularly helpful to the Board as employees were given an opportunity to discuss any issues or concerns they have encountered in their everyday work

with SSA, as well as provide feedback on a variety of issues. The employees gave several thoughtful recommendations on how the agency's operations could be improved in order to function more efficiently and to better serve the public. One particular concern that had been brought up repeatedly was staffing, and how strained SSA has become in recent years due to an increasingly tight budget as well as a lack of hiring within the agency.

I certify that the minutes written for the May7-8, 2013 meeting of the Social Security Advisory Board are correct.



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Barbara B. Kennelly

Acting Chair  
Social Security Advisory Board