

**Social Security Advisory Board  
Minutes  
Board Meeting  
May 7-8, 2014**

**Location:** Boston, Massachusetts

**Time:** 8:45 a.m. – 4:30 p.m. (May 7)  
8:00 a.m. – 4:30 p.m. (May 8)

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

**SSAB Staff:** Claire Green, Staff Director  
Jackie Chapin  
Joel Feinleib  
Lynn Fisher  
Emery MacFarlane  
Sarah Weaver  
Sterling Laudon

**Participants**

**Center for Retirement Research:**

**Alicia H. Munnell**, Director, Center for Retirement Research, Boston College  
**Rick Miller**, Founder, Sensible Financial Planning  
**Anek Belbase**, Research Project Manager, Center for Retirement Research, Boston College  
**Matthew Rutledge**, Research Economist, Center for Retirement Research, Boston College  
**Andrew Eschtruth**, Associate Director for External Relations, Center for Retirement Research, Boston College  
**Jean-Pierre Aubry**, Assistant Director of State and Local Research, Center for Retirement Research, Boston College  
**Anthony Webb**, Senior Research Economist, Center for Retirement Research, Boston College

**National Bureau of Economic Research:**

**Jim Poterba**, President, National Bureau of Economic Research  
**Raj Chetty**, Co-director, Public Economics Program, Faculty Research Fellow and Research Associate, National Bureau of Economic Research  
**Jeff Liebman**, Malcolm Wiener Professor of Public Policy, Kennedy School of Government, Harvard University  
**Amy Finkelstein**, Co-director, Public Economics Program and Research Associate, National Bureau of Economic Research  
**Brigitte Madrian**, Co-director of the Household Finance Working Group and Research Associate, National Bureau of Economic Research

**Congressional Staff:**

**Natalie Kaufman**, Congresswoman Katherine Clark  
**Jose Vaquerano**, Congressman Michael Capuano  
**Nick Zaferakis**, Congressman Stephen Lynch  
**Helen Rush-Lloyd**, Congressman John Tierney

**SSA:**

**Anatoly Schaidler**, Assistant Regional Commissioner, Boston Region Executive Office  
**Laura Cocozzella**, Executive Analyst, Boston Region Executive Office  
**Linda Tuttle**, Executive Officer, Boston Region Executive Office  
**Alison Seto**, Deputy Assistant Regional Commissioner, Boston Region Executive Office  
**Roberto Medina**, Regional Communications Director, Office of the Regional Commissioner  
**Carol Sax**, Regional Chief Administrative Law Judge, Office of Disability Adjudication and Review  
**John Allen**, Deputy Chief Administrative Law Judge, Office of Disability Adjudication and Review  
**Fred Gilbert**, Center Director, Center for Disability  
**Michelle SooHoo**, District Manager, Boston SSA Field Office  
**Scott Antolik**, Special Agent-in-Charge, Office of the Inspector General Office of Investigations  
**Reggie Hammonds**, Special Agent, Office of the Inspector General Office of Investigations  
**Carolyn Tedino**, Regional Management Officer, SSA ODAR, Boston RO

**ALJ Union:**

**Peter Martinelli**, Administrative Law Judge, ALJ Union  
**Marilyn Zahm**, Administrative Law Judge, ALJ Union

In May, the Board visited Boston, Massachusetts for a series of meetings over a two-day period. On the first day, the Board met with scholars at the Center for Retirement Research at Boston College to discuss retirement policy. The Board spoke with economists about the financial security of retirees and discussed options for reducing retirement risk. Afterward, scholars briefed the Board about the status of state and local pensions and how reform could impact employees.

In the afternoon, the Board travelled to the National Bureau of Economic Research for another series of discussions. The Board questioned economists about retirement savings and incentives to increase savings for retirement. The Board discussed the state of the Social Security Disability Insurance program and the causes of increased costs. Then the Board conversed with scholars about the impact of Medicaid expansion on health and the budget.

On the second day, the Board met with Congressional staff responsible for constituent service related to Social Security. The Board received feedback about Social Security programs and offered advice about interaction with SSA staff. Next, the Board traveled to the Boston Regional Office for meeting with executives and management. The Board solicited ideas from the regional office about ways to improve service to the public, reduce fraud, and manage the disability adjudication process. Representatives from the Office of Disability Adjudication and Review discussed initiatives to improve the quality of decisions made by administrative law judges and processes used to monitor progress.

Afterward, the Board traveled to a SSA field office to observe interaction with the public and to speak with employees about ground-level concerns. Field office staff discussed their accomplishments and suggested methods for improving service to the public. The Board then met with a Cooperative Disability Investigations unit and learned about efforts to catch individuals fraudulently obtaining Social Security benefits. Finally, the Board met with union representatives for SSA administrative law judges (ALJs). The Board listened to concerns from the representatives about SSA policies impacting ALJs and suggested reforms that could be taken to improve conditions.

I certify that the minutes written for the May 7-8, 2014 meeting of the Social Security Advisory Board are correct.



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Barbara B. Kennelly

Acting Chair  
Social Security Advisory Board