



# Social Security Advisory Board

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Henry J. Aaron, Chair  
Lanhee J. Chen  
Bernadette Franks-Ongoy  
Jagadeesh Gokhale  
Kim Hildred  
Barbara B. Kennelly

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Claire Green, Staff Director

## Board Meeting Minutes November 18, 2016

**Location:** 400 Virginia Avenue SW, Suite 625  
Washington, D.C. 20024

**Time:** 8:30 am – 4:30 pm

**SSAB Members:** Henry Aaron, Chair  
Lanhee Chen  
Bernadette Franks-Ongoy  
Jagadeesh Gokhale  
Kim Hildred  
Barbara Kennelly

**SSAB Staff:** Claire Green, Staff Director  
Jackie Chapin, Policy Chief  
Anita Grant, Communications Director  
Jenn Rigger, Senior Advisor  
Joel Feinleib, Staff Economist  
Sterling Laudon, Policy Attorney  
Matthew Comey, Policy Analyst  
Sarah Weaver, Management Analyst  
Caitlyn Tateishi, Management Analyst  
Bethel Dejene, Management Analyst  
Matthew Graves, Research Analyst  
Fran Huber, SSA Detailee  
Jeannette Mandycz, SSA Detailee  
Joyce Nicholas, SSA Detailee

**Presenters:**

**Social Security Administration (SSA), Office of the Inspector General:** Gale Stone, Acting Inspector General  
Rona Lawson, Assistant Inspector General for Audit

**Congressional Budget Office (CBO) Social Security Projections:** Julie Topoleski, Chief, CBO Long-term Analysis Unit

**Social Security Administration, Office of Research, Evaluation and Statistics (ORES):** John Phillips, Associate Commissioner

The Board met with Gale Stone and Rona Lawson from OIG for a statement on SSA's major management and performance challenges. Mrs. Stone updated the board on the current investigations being undertaken by the OIG and their importance. Then Mrs. Lawson reported on the changes in the process for checking a representative payee's criminal history. The OIG did a sampling of current rep payees and found that 52 individuals did not meet the requirement to be a rep payee. The OIG also sampled 85+ beneficiaries and found that more than half had a defacto rep payee. Mrs. Stone made recommendations on possible ways to improve the current rep payee system. She went on to lay out the major problems the new administration will face. Currently SSA is not on a path to sustainability.

Julie Topoleski from CBO was asked to explain the process of how it creates its projections and differences between the CBO's and the Trustees' projections. Ms. Topoleski explained how their projections are based and the key variable differences. The four major input differences are income subject to payroll tax, GDP growth, demographics, and interest rates. Ms. Topoleski then explained how each input effects the projection. However, these input differences did not fully explain the divide between the trustees and CBO projections. Ms. Topoleski stated that CBO is aggressive about adjusting its model, which can lead to larger swings in projections.

John Phillips from ORES spoke to the Board about the workings in his office and how he envisions research will be conducted through ORES in the future. He laid out the role of ORES and noted that dissemination was of particular importance. Mr. Philips plans to have a five-year grant cycle, where a set of institutions would be selected every five years and projects from within those institutions compete for grants on an annual basis. Five-year grant cycles would be needed to allow ideas to build on one another. Mr. Philips then laid out the importance of building a data infrastructure to improve ORES research.

I certify that the minutes written for the November 18, 2016 meeting of the Social Security Advisory Board are correct.



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Henry J. Aaron