

Kim Hildred, Chair
Henry J. Aaron
Nancy J. Altman
Jagadeesh Gokhale
Bob Joondeph



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Public Board Meeting Minutes September 24, 2020¹

Location: Held virtually

Time: 10:00 – 4:30 pm EST

Board Members: **Kim Hildred**, Chair
Henry Aaron, Member
Nancy Altman, Member
Jagadeesh Gokhale, Member
Bob Joondeph, Member

Board Staff: **Claire Green**, Staff Director
Diane Brandt, Research Director
Bethel Dejene, Management Officer
Sunny Bick, Management Analyst
Pamela Crawford, Senior Advisor
Conway Reinders, Lead Policy Analyst
Jenn Rigger, Senior Advisor
Omar Shalabi, Policy Analyst
Emma Tatem, Lead Policy Analyst

Representative Payees: Opportunities to Improve Service Delivery

¹ Board approved on 3/24/22.

The Social Security Advisory Board (“Board”) hosted a virtual policy forum showcasing an independent, Board-commissioned study by researchers from the Virginia Tech Center for Gerontology and the American Bar Association Commission on Law and Aging. The first two panel discussions covered capability determinations, the selection process, training, oversight, and the need for ongoing research and evaluation. The final panel considered the public service implications of a more individualized, supported decision-making model and how to get there.

10 – 10:10 am

Opening Remarks

Kim Hildred, Chair, Social Security Advisory Board

10:10 – 11 am

Presentation of Findings: “Selection Process for SSA Payees of Adults” (starts at 5:18)

The independent, Board-commissioned researchers presented their findings on the selection process for the appointment of payees, capability determinations, and the need for enhanced training.

Laura P. Sands, Professor of Human Development and Family Science, Virginia Tech

Pamela B. Teaster, Director, Center for Gerontology and Professor of Human Development and Family Science, Virginia Tech

Erica F. Wood, Assistant Director, Commission on Law and Aging, American Bar Association (retired)

Henry J. Aaron (discussant), Member, Social Security Advisory Board

11 am – 12 pm

Initial Steps: Determining Financial Capability and Selecting the Best Payee (starts at 56:23)

Panelists discussed variation in the current process for determining capability and selecting payees, how the Strengthening Protections for Social Security Beneficiaries Act of 2018

(Protections Act) changed it, how COVID has affected it, and where it differs from other substitute decision-maker programs. Panelists also discussed where additional study is needed and the types of data the agency should collect if not already doing so.

J. Michael Collins, Faculty Director, Center for Financial Security and Fetzer Family Chair on Consumer and Personal Finance, University of Wisconsin – Madison

Elizabeth H. Curda, Director, Education, Workforce, and Income Security, Government Accountability Office

Kate Lang, Senior Staff Attorney, Justice in Aging

Linda Rutland, Assistant Director, Pension and Fiduciary Service, Veterans Benefits Administration, Department of Veterans Affairs

Laura P. Sands, Virginia Tech

Pamela B. Teaster, Virginia Tech

Erica F. Wood, American Bar Association
(retired)

Christopher Detzler *(technical expert)*, Executive Officer, National Council of Social Security Management Associations; District Manager, Vancouver, Washington Field Office, Social Security Administration

David Lescarini *(technical expert)*, President, National Council of Social Security Management Associations; District Manager, McMinnville, Tennessee Field Office, Social Security Administration

Bob Joondeph *(moderator)*, Member, Social Security Advisory Board

12 – 12:30 pm

Lunch Break

12:30 – 1 pm

[Keynote Speech](#) (starts at 1:59:19)

A keynote speech addressed supported decision-making, human rights, and legal capacity for people with intellectual and developmental disabilities.

The Honorable Kristin Booth Glen, Project Director, Supported Decision-Making New York; Dean Emerita, City University of New York School of Law

1 – 2:30 pm

[Program Oversight: Monitoring Payees and Reevaluating Agency Payee Decisions](#) (starts at 2:26:50)

The independent researchers provided findings on the ongoing agency evaluation of payee decisions, including capability and payee selection. Panelists discussed the oversight process at Social Security: how the Protections Act changed it, how COVID has affected it, and whether it incorporates similar efforts from other substitute decision-maker programs. Panelists also discussed opportunities to collect new data and share information with other entities.

Reeve T. Bull, Research Director, Administrative Conference of the United States
Curtis Decker, Executive Director, National Disability Rights Network

Ed Doonan, Chairman of the Board, National Association of Organizational Representative Payees; Government Affairs Liaison, Benefits Management Corporation

Kate Lang, Senior Staff Attorney, Justice in Aging

Kathryn Larin, Director, Education, Workforce, and Income Security, Government Accountability Office

Christopher Detzler (*technical expert*), National Council of Social Security Management Associations; Social Security Administration

David Lescarini (*technical expert*), National Council of Social Security Management Associations; Social Security Administration
Pamela B. Teaster (*discussant*), Virginia Tech
Erica F. Wood (*discussant*), American Bar Association (*retired*)
Henry J. Aaron (*moderator*), Social Security Advisory Board

2:30 – 2:45 pm

Break

2:45 – 4:15 pm

[Envisioning the Future: Payees in a Supported Decision-Making Model](#) (starts at 3:41:44)

Panelists addressed whether continuing to focus on improving Social Security’s program is the right approach or whether the government should move into more of an integrated supported decision-making model, which is currently being tested in different states and other countries.

Kenneth S. Apfel, Professor of the Practice, University of Maryland School of Public Policy; former Commissioner of Social Security, Social Security Administration

The Honorable Kristin Booth Glen, Supported Decision-Making New York; City University of New York School of Law

Louis D. Enoff, former Acting Commissioner of Social Security, Social Security Administration (*retired*)

Ari Ne’eman, PhD Candidate in Health Policy, Harvard University

Morgan K. Whitlatch, Legal Director, Quality Trust for Individuals with Disabilities; Lead Project Manager, National Resource Center for Supported Decision-Making

Hilary Dalin, Director, Office of Elder Justice and Adult Protective Services, Administration for Community Living, Department of Health and Human Services

Christopher Detzler (*technical expert*), Executive Officer, National Council of Social Security Management Associations; District Manager, Vancouver, Washington Field Office, Social Security Administration

David Lescarini (*technical expert*), President, National Council of Social Security Management Associations; District Manager, McMinnville, Tennessee Field Office, Social Security Administration

Henry J. Aaron (*discussant*), Social Security Advisory Board

Pamela B. Teaster (*discussant*), Virginia Tech
Erica F. Wood (*discussant*), American Bar Association (*retired*)

Bob Joondeph (*moderator*), Social Security Advisory Board

4:15 pm – 4:30 pm

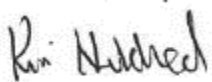
[Closing Remarks \(starts at 5:08:28\)](#)

Kim Hildred, Social Security Advisory Board

4:30 pm

Webinar Concludes

I certify the public meeting minutes' accuracy for the Social Security Advisory Board's September 24, 2020 meeting.



Kim Hildred, Chair

March 24, 2022
Date