

Joining Forces to Improve the Representative Payee Program

Public Forum Minutes March 27, 2017

Location: The 20th F Street NW Conference Center, 1st Floor, 20 F St.,
NW, Washington, DC 20001

Time: 8:00 am – 4:30 pm EST

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

Board Staff: **Claire Green**, Staff Director
Jackie Chapin, Policy Chief
Matthew Comey, Policy Analyst
Bethel Dejene, Management Analyst
Joel Feinleib, Staff Economist
Anita Grant, Senior Advisor
Matthew Graves, Research Analyst
Fran Gruber, Senior Policy Analyst, SSA Detailee
Joyce Nicholas, Senior Policy Analyst, SSA Detailee
Jenn Rigger, Senior Advisor
David Warner, Management Chief
Caitlyn Tateishi, Management Analyst

Welcome Remarks

The Honorable Sam Johnson, Chairman, Ways and Means
Subcommittee on Social Security
Henry Aaron, PhD, Chair, Social Security Advisory Board

Panel I: the Sounding the Alarm

Duke Han, Diplomate, American Board of Professional
Psychology, Director of Neuropsychology, Department of

Family Medicine, and Associate Professor of Family Medicine, Neurology, Psychology, and Gerontology, University of Southern California

Robert Weathers, Supervisory Economist, Office of the Chief Actuary, Social Security Administration

Henry Aaron, PhD, Chair, Social Security Advisory Board
(Moderator)

Remarks

Kathryn Olson, Democratic Staff Director, Committee on Ways and Means, Subcommittee on Social Security

Panel II: Identifying Who Needs a Representative Payee

Geoffrey Sanzenbacher, Research Economist, Center for Retirement Research, Boston College

Paul Appelbaum, Elizabeth K. Dollard Professor of Psychiatry, Medicine, and Law and Director, Division of Law, Ethics, and Psychiatry, Department of Psychiatry, College of Physicians and Surgeons, Columbia University

Ari Ne'eman, Chief Executive Officer, MySupport.com and Policy Consultant, American Civil Liberties Union

Bernadette Franks-Ongoy, Member, Social Security Advisory Board and Executive Director, Disability Rights Montana (Moderator)

Panel III: Perspectives from the Front Lines

Ed Doonan, Chairman, Board of National Association of Organizational Representative Payees and Government Affairs Liaison, Benefits Management Corporation/Living in Familiar Environments

Susanne Horn, Representative Payee Program Manager, Bread for the City

Lawrence L. Sharp, III, Chief Executive Officer and Founder of SMILE Payee Services and Using Money Wisely

Bernadette Franks-Ongoy, Member, Social Security Advisory Board and Executive Director, Disability Rights Montana (Moderator)

Panel IV: Monitoring the Representative Payee Performance

Eric Ice, Director, Office of Representative Payee and Due Process Policy, Social Security Administration

Cate Boyko, Manager, Minnesota Judicial Branch Statewide Conservator Account Auditing Program.

Curt Decker, Executive Director, National Disability Rights Network

Jim Klein, Director, San Francisco Audit Division, Office of the Inspector General, Social Security Administration

Kim Hildred, Member, Social Security Advisory Board and President, Hildred Consulting LLC (*Moderator*)

Panel V: Monitoring the Representative Payee Performance

Sally Hurme, Board of Directors, National Guardianship Association

Matt Wiener, Vice Chairman and Executive Director, Administrative Conference of the United States

Nyree Ryder Tee, Assistant Director, Education, Workforce, and Income Security, Government Accountability Office

Gale Stallworth Stone, Acting Inspector General, Social Security Administration

Kim Hildred, Member, Social Security Advisory Board and President, Hildred Consulting LLC (*Moderator*)

Closing Remarks

Henry Aaron, PhD, Chair, Social Security Advisory Board

A summary of information from the forum, including themes presented during each panel, is provided in the Board's Report *Improving Social Security's Representative Payee Program, January 2018*. Each panel discussion is summarized in Appendix D, found on page 33. The 2018 report is available here: https://www.ssab.gov/wp-content/themes/ssab/download-file.php?fid=1uqF62BofPUYS4ief8iHzMLAp_AIwoMiq&fname=2018%20ImprovingRepPayee2018.pdf.