

FY 2022 Annual Report

Social Security Advisory Board
December 2022

Bob Joondeph, Chair
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Acronyms

Acronym	Term
AEI	American Enterprise Institute
DI	Disability Insurance
DDS	Disability Determination Services
EO	Executive Order
FAS	Federal Acquisition Services
FY	Fiscal Year
GSA	General Services Administration
IT	Information Technology
NAPA	National Academy of Public Administration
OASI	Old-Age and Survivors Insurance
OASDI	Old-Age, Survivors, and Disability Insurance
OIG	Office of the Inspector General
SSA	Social Security Administration
SSAB	Social Security Advisory Board
SSI	Supplemental Security Income
TR	Trustees' Report

Message from the Chair

In Fiscal Year 2022 (FY 22), the Social Security Advisory Board (“Board”) carried on its mission to educate the public and to advise the President, Congress, and the Commissioner of Social Security on policies related to the Social Security and Supplemental Security Income (SSI) programs. The Board accomplished this by publishing reports and by holding public events designed to inform both the Board’s work and interested individuals and organizations.

The Board continued its practice, begun in March 2020, of holding Board meetings and public events on virtual platforms. This has resulted in greater geographical reach to more people and attracted new attendees. The Board hosted five public events, including a Systems Speaker Series exploring the cybersecurity landscape, information technology (IT) acquisition, and secure, user-friendly IT systems. Events also featured independent researchers discussing barriers and equitable access to the programs administered by the Social Security Administration (SSA), and a policy briefing on the effects of marital status on SSI recipients. The Board issued four publications in FY 22: a paper on the challenges of medical evidence collection in disability claims, a report on equitable access to services, the Board's annual statement on the SSI program urging adoption of an online SSI application for older adults, and the Board's FY 21 annual report.

As SSA worked to re-open field offices which had been closed since March 17, 2020, the Board frequently met with SSA leadership, unions, advocates for claimants and beneficiaries and field office managers to discuss challenges and ways forward in providing quality services to the public. Meetings on specific issues such as IT modernization, communications initiatives, Disability Determination Services (DDS) operations, and SSA’s operating budget informed our work. The Board’s work relies upon the many dedicated SSA employees, stakeholders and experts who share their knowledge, experience, and insights. Without them and our highly capable staff, the Board’s work could not be accomplished. We thank them for their important contributions to our efforts to educate and advise.

Bob Joondeph

Bob Joondeph, Chair

About the Board

The Board is a bipartisan, independent, federal government agency established by statute in 1994. The Board analyzes the nation's retirement and disability programs and advises the President, the Congress, and the Commissioner of Social Security on matters of policy and administration of the Old-Age and Survivors Insurance (OASI), Disability Insurance (DI), and SSI programs. Board members are appointed by the President, the President pro tempore of the Senate, and the Speaker of the House of Representatives. The statute requires that members are chosen based on their integrity, impartiality, and good judgment and because of their education, experience, and achievements.¹

The Board's research is framed by its authorizing statute, which sets out the nine broad functions listed below. The Board's research portfolios identify priority topics for examination and associated deliverables, including publications and public events posted on the Board's website. The nine broad functions are:

1. analyzing the Nation's retirement and disability systems and making recommendations with respect to how the old-age, survivors, and disability insurance program and the supplemental security income program, supported by other public and private systems, can most effectively assure economic security;
2. studying and making recommendations relating to the coordination of programs that provide health security with programs described in paragraph (1);
3. making recommendations to the President and to the Congress with respect to policies that will ensure the solvency of the old-age, survivors, and disability insurance program, both in the short-term and the long-term;
4. making recommendations with respect to the quality of service that the Administration provides to the public;
5. making recommendations with respect to policies and regulations regarding the old-age, survivors, and disability insurance program and the supplemental security income program;
6. increasing public understanding of the social security system;

¹ 42 U.S.C. 903 (c) (2))

7. making recommendations with respect to a long-range research and program evaluation plan for the Administration;
8. reviewing and assessing any major studies of social security as may come to the attention of the Board; and
9. making recommendations with respect to such other matters as the Board determines to be appropriate.

FY 2022 Research Portfolios and Statutory Functions

In FY 22, the Board's work encompassed eight of the above-listed statutory functions. The functions relevant to each research portfolio are included in the descriptions below. All Board reports and public sessions are linked below and can be found on the Board's [website](#). The Board continually seeks to build on these research portfolios in fulfilling its mission.

The Board FY 22 public sessions:

- [Systems Speaker Series:](#)
 - Federal Cybersecurity Landscape
 - Federal Acquisition Process
 - Making Secure IT Systems User-Friendly
- [Researching and Evaluating Equitable Access to Social Security Programs](#)
- [Social Security Marriage Penalties](#)

The Board FY 22 publications:

- [Medical Evidence Collection in Adult Social Security Disability Claims](#)
- [2022 SSI Statement Urging Online Application for Older Adults](#)
- [Using Evidence to Improve Service Equity in Social Security Programs](#)
- [2021 Annual Report](#)

Disability

- *Making recommendations with respect to policies and regulations regarding OASDI and SSI*
- *Increasing public understanding of the Social Security system*

Since 2018, the Board has hosted public roundtable discussions with subject matter experts on different aspects of the disability determination process. The discussions identified several topics of particular interest, including the collection of medical evidence. In May of 2022, the Board released a paper examining the process by which medical evidence is collected for adult disability claims.

Medical Evidence Collection in Adult Social Security Disability Claims

Social Security's disability determination process requires collecting medical evidence by federally funded state DDSs to determine medical eligibility for disability benefits. On July 29, 2021, the Board brought together DDS managers and staff, a claimants' attorney, and former Social Security executives for a roundtable on the agency's medical evidence collection process. The discussion covered the types and formats of evidence collected, evidentiary sources, the procedural steps for collecting medical evidence, and the effects of the pandemic on medical evidence collection. Participants also described technologies used to facilitate the process.

Those discussions inspired further Board research into medical evidence collection for adult disability claimants by state DDSs and culminated in this report. In addition to outlining the process and tools used, the paper describes how missing medical evidence affects the process and how the COVID-19 pandemic has affected medical evidence collection. The paper concludes by encouraging SSA, DDSs, extramural researchers, advocates, and policymakers to examine the medical evidence collection process closely. These examinations should include, but not be limited to:

- The effect of evidence collection on program outcomes
- Claimant and DDS-level variations that affect the availability of different types of evidence
- The effectiveness of automated processes for collecting and evaluating evidence
- Ways claimant treating/medical sources can be better engaged in the disability determination process

This paper is part of the Board's ongoing examination of the disability determination process.

SSI

- *Making recommendations with respect to policies and regulations regarding OASDI and SSI*
- *Increasing public understanding of the Social Security program*

2022 SSI Statement Urging Online Application for Older Adults

Public Law 104-193, The Personal Responsibility and Work Opportunity Act of 1996, permits members of the Board, either individually or collectively, to include their views in SSA's [Annual Report](#) of the SSI Program to the President and Congress.

This year's Board statement, released July 2022, highlights challenges SSI-eligible adults aged 65 and older may potentially encounter when using online services. The statement reviews factors important for SSA to consider when designing and implementing a dedicated online SSI application for older adults whose eligibility determination is limited to non-medical criteria. A well-designed online SSI application may allow some older adults to fully self-serve online, potentially improving claims processing efficiency at SSA. In addition, finding ways to reduce application barriers for older adults would enhance usability for others with differing abilities. It would also benefit those assisting aged claimants to apply for SSI, whether they are family members, friends, or representatives. The Board highlights the importance of relying on a wide range of design, systems, and end-user perspectives and incorporating insights from academic literature, data, agency and community partners, and customers when designing and deploying an online SSI application. The paper focuses on older adults as a first step to developing an online option for all SSI claimants.

Public Policy Briefing on Social Security Marriage Penalties

On July 29, 2022, the Board hosted a policy briefing by the Consortium for Constituents with Disabilities working group on the reduced benefit rates for married couples. Participants discussed how marital status may reduce or eliminate Social Security and SSI benefit amounts for those receiving benefits who marry or are married. The policies reducing benefits assume economies of joint living which the presenters challenge, but which is current law. The group then suggested legislative and administrative changes.

Service to the Public

- *Making recommendations with respect to the quality of service that the Administration provides to the public*
- *Increasing public understanding of the Social Security system*
- *Making recommendations with respect to a long-range research and program evaluation plan for the Administration*

The President signed [Executive Order](#) (EO) 13985, “Advancing Racial Equity and Support for Underserved Communities Through the Federal Government,” on January 20, 2021. SSA had to assess whether its programs equitably serve all eligible people, particularly those noted in the EO as historically underserved. The Board submitted a public comment in the Federal Register in FY 21 encouraging SSA to use evidence and engage stakeholders to inform decisions aimed at reducing public burdens. As a follow-up to that work, in FY 22, the Board hosted a public session on “Researching and Evaluating Equitable Access to Social Security Programs” and published the second paper in a series of work on the quality and accessibility of Social Security’s service to the public, titled *Using Evidence to Improve Service Equity*.

Public Session on Researching and Evaluating Equitable Access to Social Security Programs

As SSA began implementing its equity plan and research agenda, the Board hosted two experts in a public session to discuss how research about people’s experience with SSA can improve government services, particularly for people who encounter barriers to access. On May 20, 2022, 115 participants joined experts Pamela Herd and Sebastian Jilke as they discussed the administrative burdens people experience when accessing SSI, the implications of administrative-survey data linkages, and opportunities to test behavioral insights around mailer and third-party outreach.

Dr. Herd defined administrative burden as “the experience of difficult interactions with the state, such as trying to access benefits.” Herd gave examples of administrative burdens in the SSI program, such as difficulties accessing field offices, proving disability eligibility, and navigating complex asset documentation requirements. Herd identified opportunities to improve outreach, simplify application complexity, and outsource third-party support. Dr. Jilke highlighted the use of mailers and behavioral nudges to promote equitable access and the need to personalize and continuously test the

interventions used. After the presentations, the professors fielded questions from Board members and the public.

Report on Using Evidence to Improve Service Equity in Social Security Programs

In this report, released September 27, 2022, the Board encourages SSA to measure the impacts of service changes across an array of socioeconomic, regional, and other population characteristics to inform program administration. The paper focuses on how Social Security can implement three current federal initiatives – customer experience, evidence-based decision-making, and service to underserved populations – to inform agency decisions. The paper then discusses how the public have interacted with the agency’s service channels – in-person, phone, online, video, mail, and third-party outreach – during COVID-19, offers preliminary insights from SSA research and other analyses and advocates for improved data on sociodemographic and geographic characteristics.

Consistent with the Board’s statutory function to make recommendations about the quality of SSA’s service to the public, the Board reiterates the importance of public engagement as a driver for collecting and using evidence to evaluate service access. The paper concludes by making the following seven recommendations:

- SSA should evaluate the quality and accessibility of its services by service channel and across an array of socioeconomic, regional, and other population characteristics and make these data and findings publicly available.
- SSA should examine whether variation exists between people’s perceptions of the agency’s services and its performance metrics for those services by race, ethnicity, and other demographics.
- SSA should examine the extent to which online *my Social Security* use is prevalent among populations with lower levels of internet literacy, education, and other barriers to digital access and use this research to simplify online procedures to broaden access and usage of *my Social Security*.
- SSA should evaluate the burdens people experience when accessing and using its identity verification methods, whether online using cellular technology, in-person visiting an office, over the phone, or mailing sensitive documents.

- Before the agency implements changes in service delivery, such as expanding video services, SSA should ensure it has collected the appropriate data to evaluate whether the service change affects how different people access and use its services. SSA should further study its outreach options and compare the effectiveness of direct mail to other types, such as outreach through ads or in person.
- SSA should examine the share of service variations across socioeconomic groups that cannot be associated with observable applicant and case characteristics.

IT Systems Modernization

- *Increasing public understanding of the Social Security system*
- *Reviewing and assessing any major studies of Social Security as may come to the attention of the Board*
- *Making recommendations with respect to such other matters as the Board determines to be appropriate*

Public Sessions on IT Modernization

The Board recognizes the importance of SSA's ongoing efforts to modernize its systems. In FY 21, the Board initiated a System Speakers Series to educate the public and examine issues important to SSA's IT modernization efforts. The Board continued that initiative in FY 22 and hosted five expert speakers in three public sessions. Presenters discussed different aspects of IT modernization in the federal and private sectors.

The Cybersecurity Landscape

The Board hosted a public event on November 19, 2021, featuring two speakers with both public and private sector expertise. MITRE's Dave Powner described executive branch initiatives and congressional legislation for federal agencies. Powner's presentation highlighted the zero-trust model, a key element of the May 2021, [Executive Order 14208](#), "Improving the Nation's Cybersecurity." He also discussed modernizing legacy systems, customer experience and explained how the Evidence Act identified important agency metrics for federal IT systems. Fortinet's Jim Richberg explained public and private sector cybersecurity challenges, and the different threats encountered in each area, lessons learned from private sector cyber advancements, and the accelerated digital transformation brought on by COVID-19.

Federal IT Acquisition

On January 27, 2022, the Board welcomed presenters who described government-wide IT initiatives offered through the General Services Administration (GSA) that are intended to enhance acquisition efficiency across the government. GSA's Federal Acquisition Service (FAS) is solely dedicated to procuring goods and services for the government. Collective procurement strategies, in contrast to agency-specific approaches, is one way to achieve cost savings, reduce risk, and speed acquisition time. The Board invited the current FAS lead for IT and Assistant Commissioner for the Office of Information Technology Category, Laura Stanton, to describe the acquisition services available to federal agencies. FAS is the largest IT procurement and services operation in the US government, facilitating more than \$32 billion in annual government spending while realizing nearly \$2 billion in savings. Stanton's predecessor, Bill Zielinski, former SSA CIO and Deputy Commissioner of Systems also shared insight on SSA's technology purchasing posture and how the agency fits into the federal IT spending profile.

Making Secure IT Systems User-Friendly

In the Series' seventh and final Board hosted event on February 16, 2022, Lorrie Cranor, professor and director of the CyLab Security and Privacy Institute at Carnegie Mellon University, presented findings from her research on IT systems security, privacy, and usability. Dr. Cranor discussed users' problems when interacting with identity authentication systems, privacy choice interfaces, and other security and privacy tools. The presentation discussed the design and use of passwords, password management, storage programs, and the use of cookies and their implications for online privacy.

Solvency

- *Analyzing the Nation's retirement and disability systems and making recommendations with respect to how the Old-Age, Survivors, and Disability Insurance program and the Supplemental Security Income program, supported by other public and private systems, can most effectively assure economic security*

- *Making recommendations to the President and to the Congress with respect to policies that will ensure the solvency of the Old-Age, Survivors, and Disability Insurance program, both in the short-term and the long-term*
- *Increasing public understanding of the Social Security system*

Briefing on the 2021 Annual Report (TR) of the Board of Trustees of the Federal Old-Age and Survivors Insurance (OASI) and Federal Disability Insurance (DI) Trust Funds

By law, the Social Security Board of Trustees is required to report annually to Congress on the Trust Funds' financial operations for the immediate past year, their projected operations over the next five years, and their long-range actuarial status. On June 2, 2022, the trustees published its [report](#). In an executive session on June 15, 2022, Social Security's Chief Actuary, Stephen C. Goss, briefed the Board on the actuarial projections outlined in the TR, and discussed the current and projected financial status of Social Security and Medicare based on the financial outlook for the OASI and DI Trust Funds.

Board Discussion on Future Work on the Social Security Trust Fund Report

Beginning in 1999, and continuing every four years, the Board has appointed an independent, expert panel comprised of prominent economists, actuaries, and demographers to review the assumptions and methods used to develop the annual report of the Social Security Trustees on the financial status of the OASI and DI trust funds. Each panel's goal is to provide an independent assessment of the information used by the Trustees, the Chief Actuary, and program administrators to evaluate the program's financial status and analyze how economic and demographic trends affect Social Security's long-term solvency. The panels' work culminates in a report on their findings and recommendations.

In FY 22, the Board elected to review the ongoing relevance, usefulness, frequency, and format of prior Board appointed independent expert panels and reports to determine the merits of convening a panel in 2023. To assist in that effort, the Board met with former Board Chairs, financial experts and consumers of the report, and Social Security's Office of the Chief Actuary, to solicit their views on the most impactful use of the Board's resources. After much discussion and consideration, the Board agreed to a series of technical expert roundtables in FY 23 and will revisit hosting a formal panel at some point in the future.

Additional Research Activities

National Academy of Public Administration Interview

In January 2022, Kim Hildred was invited by the National Academy of Public Administration (NAPA) to discuss the findings of a 2019 Board report on SSA's Death Master File. The interview was part of NAPA's statutorily mandated effort to review approaches to the federal government's access to death data collected by state vital records [offices](#).

Contributions to SSA's Learning Agenda

- *Making recommendations with respect to a long-range research and program evaluation plan for the Administration*

As part of our ongoing work, the Board regularly meets with SSA leadership and the Office of the Inspector General.

To comply with the Foundations for Evidence-Based Policymaking Act of 2018 and Executive Branch guidance requiring Federal agencies to develop an evidence-building plan, or Learning Agenda, SSA solicited ideas focused on any area of SSA's mission, including service delivery, operations, programs, policies, regulations, communication, and stewardship. SSA's first Learning Agenda, published in February 2022 and linked [here](#), expressly acknowledges the Board's contribution as follows:

“We regularly receive information on potential research and evaluation activities during routine communications with ... the Social Security Advisory Board (SSAB). For example, our Associate Commissioner for the Office of Research, Evaluation, and Statistics sends an annual request for research topics to the SSAB. We considered their response ... as we developed our Learning Agenda. We also obtained information from the SSAB's Roundtable on Social Security's Public Service that included a discussion of underserved populations and relevant research questions that we considered for inclusion in our Learning Agenda.

In conducting these evidence-based activities, which include modernizing the Social Security Statement to increase the public's understanding of

our programs, “we based the redesigned Statement on recommendations from the Social Security Advisory Board.”

Governance

Article 8 of the Board bylaws entitled Public Accountability requires the Board to prepare annual reports on its SSAB activities and its budget which shall be made available to the public. In FY 22 the Board published its FY 21 Annual Report, summarizing its accomplishments during FY 21 and providing information regarding the Board budget expenditures. Along with the publication of reports and holding Board meetings and public events, SSAB operates to fulfill the government-wide requirements of an Executive branch agency. In support of these efforts in FY 21 and 22, SSAB established two new positions, a General Counsel, and a Systems Engineer. These positions are currently focused on internal operations to ensure: our systems security plan meets required standards, the agency website adheres to digital.gov standards, that agency agreements and contracts provide the agency the necessary expertise to operate, that SSAB has needed internal controls, and that agency policy and procedures meet government-wide requirements.

Kim Hildred’s Term on the Board Expires

Kim Hildred, who was appointed to the Board in September 2016 and served as Chair from July 2017 to July 2021, stepped down from the Board at the end of her term.

During Kim’s tenure as Chair, she urged the Board and staff to identify key issues important to Social Security programs and policies and examine ways to improve and inform SSA’s service delivery. Kim recognized the invaluable expertise of SSA staff throughout the agency, including those at state and local levels, and the importance of hearing their voices to identify concerns and develop issue solutions.

Within SSAB, Kim worked to strengthen agency governance processes and position the agency as a valuable resource to SSA. Kim’s keen understanding of the political environment motivated her efforts to gain bipartisan insight on complex issues. Her steadfast leadership remained focused on the Board’s mission, holding public service at the center of Board activities. The Board thanks Kim for her dedicated service to Social Security and the public.

Board Nominations and Appointments

White House Nominations

On January 21, 2022, President Joe Biden announced his intent to nominate Sharon Lewis of Oregon to serve on the Board. Currently, Ms. Lewis is a Principal at Health Management Associates, where she consults with government entities, providers, and advocates to advance opportunities for people with disabilities to fully participate in all aspects of their communities. Before that, Lewis worked at the Department of Health and Human Services, where she was one of the chief architects of the Administration for Community Living. On April 7, the President sent Lewis' nomination to the Senate.

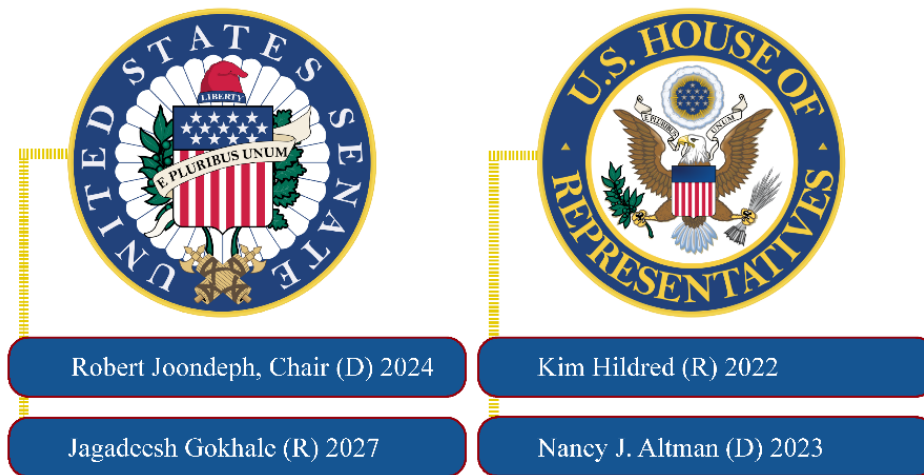
On May 13, 2022, the President announced his intent to nominate Andrew G. Biggs of Oregon to serve on the Board. Mr. Biggs is a Senior Fellow at the American Enterprise Institute (AEI), where he studies Social Security reform, state and local government pensions, and public sector pay and benefits. Before joining AEI, Biggs was the Principal Deputy Commissioner of SSA, where he oversaw SSA's policy research efforts. On May 17, the President sent Biggs' nomination to the Senate.

House Appointment

Amy Shuart, of Alexandria, Virginia, has been appointed by the House to the Social Security Advisory Board for a six-year term effective October 9, 2022. Amy has over 15 years of experience in Social Security and identity policy. She is currently the Head of North America Government Affairs and Policy Director for Onfido, a technology company that specializes in automated global digital identity verification and authentication solutions. For over a decade, she worked for the Committee on Ways and Means, most recently as the Social Security Subcommittee Staff Director. She started her career as a Presidential Management Fellow at SSA in the Office of Retirement Policy and has also worked at the Office of Management and Budget in the Medicare Branch and the White House National Economic Council. She holds a Bachelor of Arts in Political Science and a Bachelor of Arts in Public and Urban Affairs from Virginia Tech, and a Master of Public Affairs from the Lyndon B. Johnson School of Public Affairs at the University of Texas at Austin.

FY 2022 Board Members and Open Seats

The Board may have as many as seven members; currently the Board has four members, two appointed by the Senate and two appointed by the House. The graphic below shows the Board members in FY 22 and when their terms end.

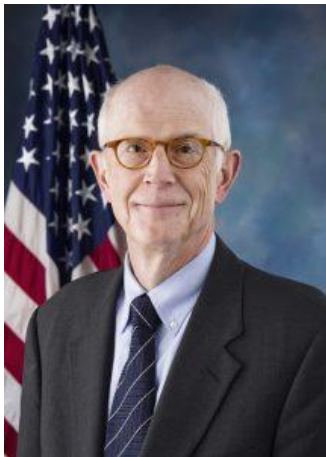


There continue to be three open presidential appointments. The following graphic shows how long the White House appointments have been empty.



The Board's authorizing statute sets forth the appointment process:

- Three members shall be appointed by the President, by and with the advice and consent of the Senate. Not more than two of such members shall be from the same political party.
- Two members (each member from a different political party) shall be appointed by the President pro tempore of the Senate with the advice of the Chairman and the Ranking Minority Member of the Senate Committee on Finance.
- Two members (each member from a different political party) shall be appointed by the Speaker of the House of Representatives, with the advice of the Chairman and the Ranking Minority Member of the House Committee on Ways and Means.
- Each member of the Board shall serve for a term of six years, except that—
 - A member appointed to a term of office after the commencement of such term may serve under such appointment only for the remainder of such term.



Bob Joondeph, JD, Chair, served as the Executive Director of Disability Rights Oregon for over 30 years, promoting and defending the legal and civil rights of Oregonians with disabilities through legal-based advocacy. Bob has represented individuals with disabilities in state and federal courts, agencies, and legislatures. He has served on the Oregon Health Evidence Review Commission, Health Services Commission, Health Fund Board, Mental Health Planning and Management Advisory Council, State Rehabilitation Commission, Governor's Task Force on

Brain Injury, and the Council on Developmental Disabilities. Bob is the recipient of the Oregon State Bar Public Service Award, Oregon Disabilities Commission Advocate of the Year Award, Brain Injury Alliance of Oregon Advocacy Award, and the Oregon Civil Rights Leadership Award, and is a graduate of Case Western Reserve Law School and Brown University. Current term of office: October 2018 to September 2024.



Jagadeesh Gokhale, PhD, is Director of Special Projects at Penn Wharton Budget Model. Prior to joining Wharton, Dr. Gokhale was a Senior Fellow at the Cato Institute. An economist by training, Jagadeesh's main research fields are macro and public economics, with a particular focus on the effects of fiscal policy on future generations. He has written extensively on policy issues including Social Security and Medicare reform, national saving, private insurance, financial planning, wealth inequality, generational accounting, and public intergenerational transfers; he has testified before

Congress several times on these topics. In 2010 Jagadeesh published *Social Security: A Fresh Look at Policy Alternatives*, which constructs a different method for determining the solvency of the Social Security trust funds.

Jagadeesh is published in numerous professional journals and newspapers such as *The Wall Street Journal*, *The Financial Times*, *The Washington Post*, and *Forbes*. terms of office: First term: November 2009 to September 2015 Second term: October 2015 to September 2021. Third term: Jagadeesh was reappointed to a consecutive term in October 2021 to September 2027.



Kim Hildred currently serves as President of Hildred Consulting, LLC., and served as Chair of the Social Security Advisory Board from July 2017 until July 2021. In 2015, Kim retired from the US House of Representatives after serving 17 years as Staff Director of the House Ways and Means Subcommittee on Social Security. There, she assisted Committee Members in the development and passage of legislation to strengthen Social Security retirement, survivors, and disability programs, as well as oversight of these programs. Prior service includes three years deciding Social Security

disability claims, followed by ten years managing Social Security disability programs, including service as a Federal Disability Hearing Officer and Disability Program Administrator. Kim has a Bachelor of Arts from Waynesburg University and a Master of Science in education from Duquesne University. Current term of office: September 2016 to September 2022.



Nancy J. Altman, JD, has a forty-five-year background in Social Security and private pensions. Currently, she is President of Social Security Works and Chair of the Strengthen Social Security Coalition. Nancy was on the faculty of Harvard University's Kennedy School of Government and taught courses on private pensions and Social Security at the Harvard Law School. In 1982, she was Alan Greenspan's assistant in his position as Chairman of the bipartisan commission that developed the 1983 Social Security amendments. Nancy is the author of *The Battle for Social Security* and *The Truth About Social Security*, as well as co-author of *Social Security Works! Why Social Security Isn't Going Broke and How Expanding It Will Help Us All* and *Social Security Works for Everyone! Protecting and Expanding the Insurance Americans Love and Count On*. She has an AB from Harvard University and a JD from the University of Pennsylvania Law School. Current term of office: October 2017 to September 2023.

Board Staff

Claire Green, Staff Director

Diane Brandt, Research Director

Sunny Bick, Management Analyst

Cheri Cannon, General Counsel

Stacy Cloyd, Senior Policy Attorney

Pamela Crawford, Senior Advisor

Bethel Dejene, Management Officer

Paul Frazier, IT Systems Engineer

Conway Reinders, Lead Policy Analyst & Communications Officer

Jenn Rigger, Senior Advisor

Emily Roessel, Senior Policy Researcher

Omar Shalabi, Policy Analyst

Emma Tatem, Lead Policy Analyst

Appendices

FY 22 Board Meetings and Public Sessions

The Board's authorizing statute requires the Board to meet at least four times per year. However, the Board consistently exceeds that number and in FY 22 it held six two-day meetings, supplemented with internal calls and Chair meetings. Due to ongoing pandemic concerns, all meetings in FY 22 were again held virtually.

All public meeting minutes and videos are available on the Board's [website](#). The Board public sessions are listed here:

- Federal Cybersecurity Landscape (November 19, 2021)
- Federal Acquisition Process (January 27, 2022)
- Making Secure IT Systems User-Friendly (February 16, 2022)
- Researching and Evaluating Equitable Access to Social Security programs (May 20, 2022)
- Social Security Marriage Penalties (July 29, 2022)

In FY 22, the Board met with SSA Leadership, staff, unions, actuaries, former Board members, as well as many experts from both the private and the public sector. The Board is grateful to all those who shared their knowledge and expertise; we could not do our work without them. We would like to acknowledge them here.

November 18 – 19, 2021

On **November 18**, the Board met in executive session.

Executive Session

- **Scott Frey**, Chief of Staff, Office of the Commissioner, SSA
- **Ben Belton**, Senior Advisor, Office of the Commissioner, SSA

Executive Session

- **Gail Ennis**, Inspector General, Office of the Inspector General (OIG), SSA

- **Kevin Huse**, Deputy Assistant Inspector General for Investigations, OIG, SSA
- **Jeffrey Brown**, Deputy Assistant Inspector General for Audits, OIG, SSA
- **Chad Bungard**, Chief Strategy Officer, SSA
- **Craig Meklir**, Senior Advisor, Office of Audit, OIG, SSA
- **Ranju Shrestha**, General Attorney, OIG, SSA

On **November 19**, the Board met in executive session in the morning. In the afternoon, in a public session, the Board hosted its sixth systems speaker series event on Cybersecurity.

Executive Session

- **Erik Jones**, Assistant Deputy Commissioner, Office of Operations, SSA
- **Stephanie Hall**, Assistant Deputy Commissioner, Office of Operations, SSA
- **John Owen**, Associate Commissioner, Office of Disability Determinations, SSA
- **Lucinda Davis**, Deputy Associate Commissioner, Office of Disability Determinations, SSA

Executive Session

- **David Lescarini**, President, National Council of Social Security Management Associations (NCSSMA); District Manager, McMinnville, Tennessee Field Office, SSA
- **Rachel Emmons**, Government Relations and Public Affairs Specialist, Greystone Group LLC (representing NCSSMA)

Public Session

- **Dave Powner**, Executive Director, Center for Data-Driven Policy and Director, Strategic Engagement and Partnerships, MITRE Corporation
- **Jim Richberg**, Public Sector Field CISO and Vice President, Information Security, Fortinet

January 27 – 28, 2022

On **January 27**, in a morning public session, the Board hosted its sixth systems speaker series event on IT Acquisition and completed the day in executive session.

Public Session

- **Laura Stanton**, Assistant Commissioner for the Office of Information Technology Category, FAS, GSA
- **Bill Zielinski**, Chief Information Officer, City of Dallas

Executive Session

- **Scott Frey**, Chief of Staff, Office of the Commissioner, SSA
- **Ben Belton**, Senior Advisor, Office of the Commissioner, SSA

Executive Session

- **Stephen C. Goss**, Chief Actuary, Office of the Chief Actuary, SSA

On **January 28**, the Board met in executive session.

February 16, 2022

Public Session

- **Lorrie Cranor, DSc**, Director and Bosch Distinguished Professor, CyLab Security and Privacy Institute; FORE Systems Professor of Computer Science and of Engineering and Public Policy, Carnegie Mellon University

March 24 – 25, 2022

On **March 24**, the Board met in executive session.

Executive Session

- **Darlynda Bogle**, Acting Deputy Commissioner, Office of Communications, SSA

Executive Session

- **Ben Belton**, Senior Advisor, Office of the Commissioner, SSA
- **Kim Baldwin-Sparks**, Chief Business and Customer Experience Officer, SSA

On **March 25**, the Board met in executive session.

Executive Session

- **Leon Scales**, President, National Council of Disability Determination Directors (NCDDD); Director, Virginia DDS, Richmond, SSA
- **Jackie Russell**, President-Elect, NCDDD; Director, North Carolina DDS, Raleigh, SSA
- **Liz McLarin**, Past President, NCDDD; Director, Iowa DDS, Des Moines, SSA

Executive Session

- **Stacy Cloyd**, Director of Policy & Administrative Advocacy, National Organization of Social Security Claimants' Representatives

Executive Session

- **Scott Frey**, Chief of Staff, Office of the Commissioner, SSA
- **Ben Belton**, Senior Advisor, Office of the Commissioner, SSA

Executive Session

- **David Lescarini**, President, NCSSMA; Field Office Manager, McMinnville, Tennessee, SSA
- **Gregory Brusik**, Vice President, NCSSMA; Field Office Manager, Bellingham, Washington, SSA
- **Peggy Murphy**, Immediate Past President, NCSSMA; Field Office Manager, Great Falls, Montana, SSA
- **Scott Hale**, Past President, NCSSMA; Field Office Manager, Mobile, Alabama, SSA
- **Steve Merriam**, Teleservice Center Representative, NCSSMA; Teleservice Center Manager, Albuquerque, New Mexico, SSA

- **Beth Williams**, Executive Committee Member; NCSSMA; President, Chicago Social Security Management Association; Field Office Manager, Mt. Prospect, Illinois, SSA
- **David Itzaina**, Executive Committee Member, NCSSMA; President, San Francisco Region Social Security Management Association; Field Office Manager, La Mesa, California, SSA
- **Rachel Emmons**, Washington Representative, NCSSMA

Executive Session

- **Ralph de Juliis**, President, American Federation of Government Employees (AFGE) Council 220
- **Sherry Jackson**, Third Vice President, AFGE Council 220

May 19 – 20, 2022

On **May 19**, the Board met in executive session.

Executive Session

- **Craig Meklir**, Senior Advisor, Office of Audit, OIG, SSA
- **Tamara Schulman**, Senior Attorney Advisor, Office of Audit, OIG, SSA
- **Jeffrey Brown**, Chief Advisor to the Assistant Inspector General for Audit, Office of Audit, OIG, SSA
- **Flo Ostrum**, Partner, National Professional Practice Director, Grant Thornton
- **Kate Summers**, CPA Senior Manager, Grant Thornton
- **Eric Eisenstein**, Director of Financial Management and Public Sector Services, Grant Thornton
- **Jill Chiucchi**, Senior Audit Manager, Grant Thornton

Executive Session

- **David Pattison**, Liaison, Trustees Working Group; Economist, Office of Economic Analysis and Comparative Studies, Office of Research, Evaluation and Statistics, Office of Retirement and Disability Policy, SSA

Executive Session

- **Christie Saunders**, Senior Advisor, Charleston, West Virginia Hearing Office, SSA; President, Chapter 224, National Treasury Employees Union (NTEU)
- **Lyllian Simins**, Senior Advisor, New York Hearing Office, NY Vice President at Large, Chapter 224, NTEU

Executive Session

- **Jack Smalligan**, Senior Policy Fellow, Urban Institute
- **Chantel Boyens**, Principal Policy Associate, Income and Benefits Policy Center, Urban Institute

Executive Session

- **ALJ Sommattie (Som) Ramrup**, Varick, New York Office of Hearings Operations (OHO), SSA; President, International Federation of Professional and Technical Engineers (IFPTE) Union for the Association of Administrative Law Judges (AALJ)
- **ALJ Kimberly Schiro**, Bronx, New York OHO, SSA; Secretary, IFPTE Union for the AALJ

Executive Session

- **Syl Schieber**, former Chair, Social Security Advisory Board

On **May 20**, the Board met in executive session in the morning and hosted a public event on “Researching and Evaluating Equitable Access to Social Security Programs” in an afternoon public session. That day was completed in executive session.

Public Session

- **Pamela Herd**, Professor, McCourt School of Public Policy, Georgetown University
- **Sebastian Gilke**, Associate Professor, McCourt School of Public Policy, Georgetown University

Executive Session

- **Scott Frey**, Chief of Staff, Office of the Commissioner, SSA

- **Ben Belton**, Senior Advisor, Office of the Commissioner, SSA

July 28 – 29, 2022

On **July 28**, the Board met in executive session.

Executive Session

- **Henry Aaron**, former Chair, Social Security Advisory Board

Executive Session

- **Lois Simpson**, Acting Executive Director, National Disability Rights Network (NDRN)
- **Crystal Perry**, Manager, Representative Payee Program, NDRN
- **Danielle Whetton**, Senior Analyst, Representative Payee Program, NDRN
- **Renee Pruitt**, Program Analyst, Representative Payee Program, NDRN
- **Raquel Rosa**, Program Analyst, Representative Payee Program, NDRN

Executive Session

- **Grace Kim**, Deputy Commissioner, Operations, SSA
- **Erik N. Jones**, Assistant Deputy Commissioner, Operations, SSA
- **Stephanie Hall**, Assistant Deputy Commissioner, Operations, SSA
- **Michelle Sanders Sparks**, Associate Commissioner, Office of Public Service and Operations Support, SSA
- **John Owen**, Associate Commissioner, Office of Disability Determinations, SSA
- **Delma Cardona**, Associate Commissioner, Office of Customer Service, SSA

On **July 29**, the Board hosted a public briefing in the morning on “Marriage Penalties in Social Security Programs” and met in executive session throughout the afternoon.

Public Session

- **Claudia Center**, Legal Director, Disability Rights Education & Defense Fund (DREDF)
- **Ayesha Elaine Lewis**, Staff Attorney, DREDF

- **Kate Lang**, Director of Federal Income Security, Justice in Aging
- **David Goldfarb**, Director of Policy, The Arc of the United States

Executive Session

- **Theresa Gruber**, Deputy Commissioner, OHO
- **Sylviane Haldiman**, Assistant Deputy Commissioner, OHO, SSA
- **Joseph Lytle**, Assistant Deputy Commissioner, OHO, SSA
- **Yodit Ghebrekidan**, Executive Officer, Office of the Deputy Commissioner for Hearings Operations, SSA
- **Emery McFarland**, Acting Senior Advisor in OHO's Office of the Deputy Commissioner, SSA
- **Melissa Santiago**, Associate Chief Administrative Law Judge for National Service Delivery in OHO, SSA

Executive Session

- **Julie Topoleski**, Director of Labor, Income Security, and Long-Term Analysis, Congressional Budget Office

September 29 – 30, 2022

On **September 29**, the Board met in executive session.

Executive Session

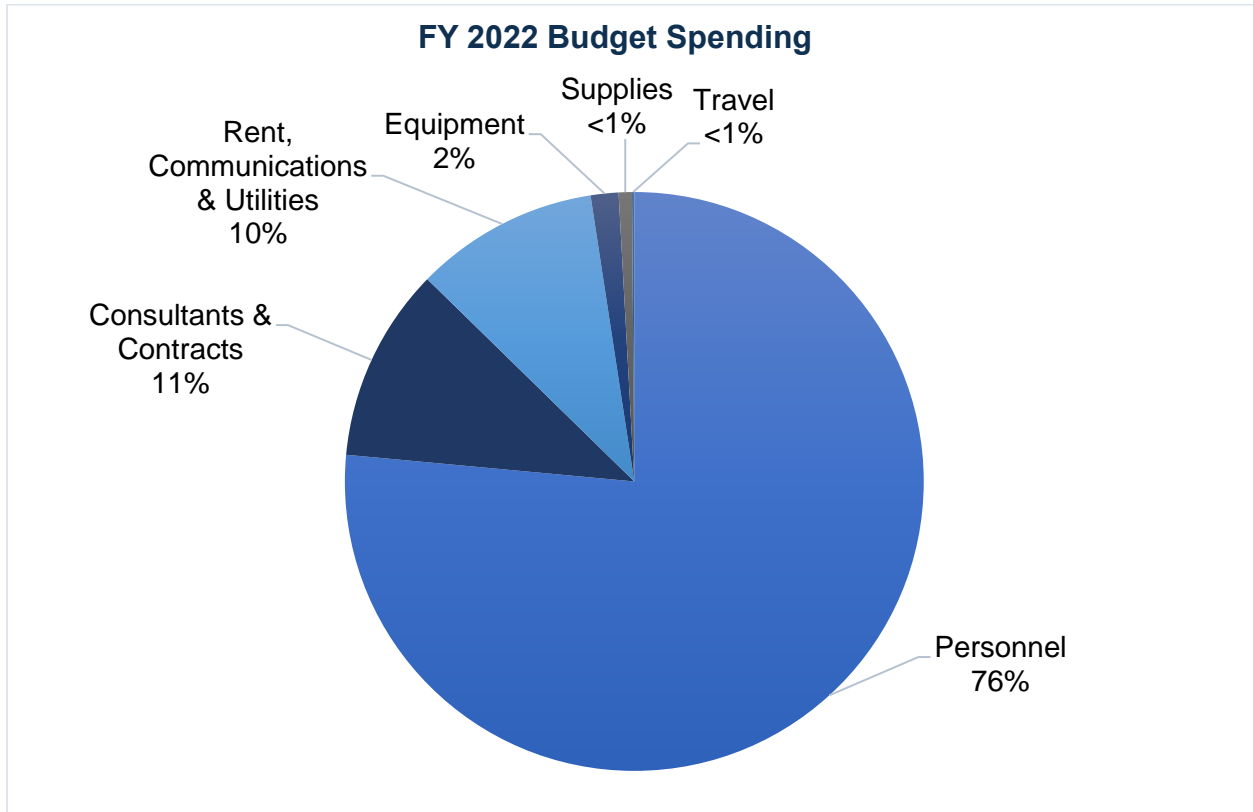
- **Tom Klouda**, Deputy Commissioner, Legislative and Congressional Affairs, SSA
- **Jeff Nesbit**, Deputy Commissioner, Communications, SSA

On **September 30**, the Board met in executive session.

Executive Session

- **Daniel Hatcher**, Law Professor, University of Baltimore School of Law
- **Amy Harfeld**, National Policy Director, Children's Advocacy Institute

SSAB Budget



FY 2022 Budget Expenditures	
Object Class	Amount
Personnel	\$ 1,930,043
Consultants & Contracts	\$ 273,710
Rent, Communications & Utilities	\$ 259,110
Equipment	\$ 39,153
Supplies	\$ 18,592
Travel	\$ 3,269
Printing & Reproduction	\$ -
TOTAL	\$ 2,523,877

SSA included \$2.7 million for the Board in its FY 22 President's budget. The Board's final appropriated amount was \$2.6 million.

- Expenses reflect the status of funds for the end of the FY. Personnel includes Board and staff salary, and benefits.

- Consultants and contracts category consists of contracts, interagency/interpersonal agreements, experts, temporary help services, training, conferences, facility, and security services.
- Expenses in the rent and communications category include rent, personal devices, UPS, and courier services.
- Supplies and equipment include office supplies and subscriptions as well as IT and office equipment.
- Travel covers transportation expenses associated with local travel and transit benefits.
- Publications were not printed in FY 22.

About the Board

The Social Security Advisory Board is a bipartisan, independent federal agency established in 1994 to advise the President, Congress, and Commissioner of Social Security on matters of policy and administration of the Old-Age, Survivors, and Disability Insurance and Supplemental Security Income programs. The Board has seven members, appointed by the President, Senate, and House of Representatives.



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