

Social Security Advisory Board

Annual Report

Fiscal Year 1998

October 1998

Social Security Advisory Board

An independent, bipartisan Board created by Congress and appointed by the President and the Congress to advise the President, the Congress, and the Commissioner of Social Security on matters related to the Social Security and Supplemental Security Income programs.

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October 1998

Message From the Board

In 1994, when the Congress passed legislation establishing the Social Security Administration as an independent agency, it also created an independent, bipartisan Advisory Board to advise the President, the Congress, and the Commissioner of Social Security on matters related to the Social Security and Supplemental Security Income programs. Under this legislation, appointments to the Board are made by the President, the Speaker of the House of Representatives, and the President pro tempore of the Senate. Presidential appointees are subject to Senate confirmation.

Since the Board began meeting in the Spring of 1996, it has worked to address the broad mandate that the law provides. As this Annual Report describes, the Board's work has encompassed a number of important issues, including long-range financing for Social Security; changes in the disability programs; policy development, research, and program evaluation by the Social Security Administration; the agency's quality of service to the public; and the Supplemental Security Income program. We have issued a number of reports with recommendations, all of which have had the unanimous approval of the Board. Our reports have been widely distributed to members of Congress, the Executive Branch, and the public.

This is the first Annual Report that the Board has issued. It describes the work that the Board has completed and the work that we currently have underway. We plan to issue similar reports in future years because it is important that we be accountable to the public. The Board is committed to working hard to help both the Congress and the Executive Branch in fulfilling their responsibilities with respect to the Social Security and Supplemental Security Income programs.

Stanford G. Ross, Chair

Jo Anne Barnhart

Lori L. Hansen

Martha Keys

Sylvester J. Schieber

Social Security Advisory Board Annual Report Fiscal Year 1998

I. Establishment of the Board

In 1994, when the Congress passed legislation establishing the Social Security Administration as an independent agency, it also created a 7-member bipartisan Advisory Board to advise the President, the Congress, and the Commissioner of Social Security on matters relating to the Social Security and Supplemental Security Income (SSI) programs. The conference report on the legislation passed both Houses of Congress without opposition. President Clinton signed the Social Security Independence and Program Improvements Act of 1994 into law on August 15, 1994 (P.L. 103-296).

Advisory Board members are appointed to 6-year terms, made up as follows: three appointed by the President (no more than two from the same political party); and two each (no more than one from the same political party) by the Speaker of the House (in consultation with the Chairman and the Ranking Minority Member of the Committee on Ways and Means) and by the President pro tempore of the Senate (in consultation with the Chairman and Ranking Minority Member of the Committee on Finance). Presidential appointees are subject to Senate confirmation.

Board members serve staggered terms. The statute provides that the initial members of the Board serve terms that expire over the course of the first 6-year period. The Board currently has two vacancies.

The Chairman of the Board is appointed by the President for a 4-year term, coincident with the term of the President, or until the designation of a successor.

In addition to the Chairman, the members of the Board are Jo Anne Barnhart, Lori L. Hansen, Martha Keys, and Sylvester J. Schieber. Stanford G. Ross was named by the President as member and Chair of the Advisory Board and confirmed by the Senate in October 1997.

II. The Board's Mandate

The law gives the Board the following functions:

- 1) analyzing the Nation's retirement and disability systems and making recommendations with respect to how the Old-Age, Survivors, and Disability (OASDI) programs and the

- Supplemental Security Income (SSI) 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 the OASDI and SSI programs;
 - 3) making recommendations to the President and to the Congress with respect to policies that will ensure the solvency of the OASDI programs, both in the short term and the long term;
 - 4) making recommendations with respect to the quality of service that the Social Security Administration provides to the public;
 - 5) making recommendations with respect to policies and regulations regarding the OASDI and SSI programs;
 - 6) increasing public understanding of Social Security;
 - 7) making recommendations with respect to a long-range research and program evaluation plan for the Social Security 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.

III. Major Activities of the Board

Consistent with its broad mandate, the Board has devoted attention to a number of issues simultaneously, as described below.

A. Long-Range Financing

A major area of concern for the Board has been issues relating to the long-range financial short-fall in the OASDI programs. The “1998 Report of the Board of Trustees of the Federal Old-Age and Survivors Insurance and Disability Insurance Trust Funds” projected a deficit in the programs equal to 2.19 percent of taxable payroll over the 75-year projection period used for evaluating the status of the Social Security programs. This projected deficit has accelerated the debate among policy makers and the public regarding the best way to address the future of Social Security.

In July 1998, the Board issued a report entitled, “Social Security: Why Action Should Be Taken Soon.” The purpose of this report was to provide a reliable source of information for policy makers and the public on 1) the dimensions of the changes that are required if the Social Security system is to maintain solvency beyond 2032, the year the Trust Funds are projected to be exhausted, and 2) the reasons why these changes should be made soon. The report also provided a brief description of alternative proposals to address the long-range solvency problem, along with data on their impact.

Although in this report the Board did not offer a specific set of proposals for addressing the financing problem in the Social Security programs, it emphasized its view that irrespective of the ultimate resolution, action to address the problem should be taken as soon as possible. Acting sooner rather than postponing such action has important advantages. The earlier action is taken, the greater the range of choices will be and the phasing in of changes can be done more smoothly. Also, the cost can be spread over more generations of workers and beneficiaries, thus minimizing the impact on each individual affected. Early action will also allow individuals to plan better for their retirement, and will result in less disruption in labor market participation and in decisions about consumption and saving. For these and other reasons stated in the report the Board urges that action be taken as soon as it can be prudently accomplished.

One aspect of Social Security reform that has been widely discussed is the possibility of raising the Social Security retirement age. The projected increase in life expectancy is an important factor in the increasing cost of Social Security. To help both policy makers and the public understand the implications of changes in the retirement age, the Board has begun preparations for a series of forums on this important topic. These forums will bring together leading experts to present their findings and to explore the consequences of raising the retirement age not only on the Social Security program, but also on the economy, beneficiaries, and employers.

Topics to be addressed by the forums include policy aspects of raising the retirement age, concerns regarding disability and health insurance, attitudes of business and labor toward older workers, and the international experience. The first of these forums is scheduled for October 13, 1998, in the U.S. Capitol.

Prior to the enactment of legislation in 1994 that made the Social Security Administration an independent agency and created the Advisory Board, the law provided for the appointment of quadrennial advisory councils on Social Security. Among the functions of these councils was the appointment of technical panels to review the assumptions and methods used by the actuaries in making projections of the Social Security programs. The 1994 legislation repealed the provision of law under which these councils were appointed. Recognizing the importance of these reviews, the Board, in consultation with the Social Security Administration, the Department of the Treasury, and other interested parties, has assumed the responsibility for the appointment of future technical panels of outside economists, actuaries, and others who are expert in various aspects of the issues involved in projecting the future financial status of the Social Security programs. The first panel will be appointed in the early part of fiscal year 1999 and is expected to make its report in mid-1999. The panel will examine the key economic and demographic assumptions used by the actuaries in making projections, as well as the methodology employed and other related matters.

B. The Disability Programs

From the Board's inception, the Social Security Disability Insurance (DI) and the Supplemental Security Income (SSI) disability programs have been an important area of attention for the Board's activities and they will continue to be so. Eighteen percent of Social Security and SSI benefits are based on disability, but two-thirds of the costs of administering the agency goes for them. The Board believes that the inherent complexity of these programs and their administration require its on-going scrutiny.

The Board has had numerous briefings from officials of the Social Security Administration and others on these programs. The Board members or its staff have consulted with field office personnel and visited nine State disability determination services (DDSs), in addition to meeting with administrators from several other States. Meetings have also been held with State vocational rehabilitation administrators, program advocates, academicians, researchers, and SSA officials on rehabilitation and employment issues. A public hearing was held in San Francisco at which representatives of organizations for the disabled and other interested members of the public were invited to give their views on these programs.

As a result of its studies, the Board issued a report in August 1998 entitled, "How SSA's Disability Programs Can Be Improved." Although the report indicated that the Board believes that in the future more structural changes may need to be considered, the recommendations focused primarily on specific administrative improvements which the Board believes are fundamental to improving the way the disability programs operate. These improvements are important irrespective of whether in the future it is decided that more fundamental changes should be made. In summary, the Board made recommendations in the following areas:

1) To make the determination process more consistent and equitable, the Board recommended an on-going joint training program for all decision makers in the disability process; a speed-up of the agency's efforts to establish a single presentation of policy that is binding on all decision makers; a quality assurance system that will serve to unify the application of policy throughout the disability system; up-dating of medical listings and vocational standards; and improvement in the development of medical evidence.

2) To make the process faster, more efficient, and more accessible the Board recommended that SSA provide claimants with a better understanding of program requirements and improve the development of claims as part of the initial disability process; give high priority to developing and implementing a computer system to support all elements of the process; better train staff to identify and assist claimants needing special help; and implement any changes in the claims and appeals process with care and in a manner that will not distract the agency from its basic responsibility to manage the disability programs.

3) To strengthen the public's trust in the integrity of the programs, the Board recommended that SSA establish strong and consistent leadership of the disability programs and encourage close teamwork among all components of the disability process; not allow pressures

to restrain administrative costs to compromise the quality of decision making; and retain as an important commitment the continuing review of the eligibility of disability beneficiaries.

4) SSA should improve its efforts to help claimants remain in the workforce by clarifying and improving its policies on referral to vocational rehabilitation and other services. It should undertake research to identify ways of helping the disabled stay in the work force, and on whether and how a policy of early referral (prior to a finding of disability) should be implemented.

5) SSA should undertake further research to improve understanding of the dynamics of program change, including careful design of the Disability Evaluation Study (including possible inclusion of longitudinal analysis). It should undertake other research needed to help policy makers understand the impact of possible future changes in disability policies and administration.

The Board made clear that this study was an initial report on the DI and SSI disability programs. The complexity of issues connected with these programs will necessitate a continuing process of evaluation and improvement and the issuance of reports in the future.

C. Supplemental Security Income Program

The law requires that members of the Board, collectively or individually, be given the opportunity to include their views in SSA's "Annual Report on the Supplemental Security Income Program." In its comments in the May 1998 report, the Board noted the growing impact of the SSI program on the work of the agency. It observed that "the major impression that has emerged from the Board's review of the SSI program is the extent to which SSI (and particularly SSI disability) now dominates the attention of much of SSA's management and staff at all levels."

The report pointed to the need to assure the public that tax dollars being used for the SSI program are well spent. It stated that one of the agency's priorities should be to look ahead to try to foresee what the SSI program will look like in the future and what needs to be done to improve it. The Board also indicated that the agency's report would be more useful if in the future it included more analysis of the data and trends in the SSI program. It suggested that SSA consider using the report as a way of bringing to the attention of policy makers both the policy issues that it believes need to be resolved and the difficulties the agency is encountering in administering the program.

The SSI program has also been a major component of the Board's studies of the disability programs. In particular, the meetings and public hearing in California on January 12-14, 1998, provided the Board with important information about the populations served and the manner in which SSA implements the SSI disability program.

The Board is cognizant that the General Accounting Office (GAO) has put the SSI program on its list of programs at “high risk” because of vulnerability to waste, fraud, abuse, and mismanagement. The Inspector General has also been looking at SSI program vulnerabilities. The Board has met with the GAO, the Office of the Inspector General, and with agency staff to discuss the issue of program integrity. This is an issue that the Board takes seriously. The Board plans to undertake further work on this issue in the future.

D. Service to the Public

One of the functions specifically given to the Board by statute is “making recommendations with respect to the quality of service that the Social Security Administration provides to the public.” Accordingly, the Board has begun a wide-ranging look into the quality of the service the Social Security Administration provides to the public. This study is a logical outgrowth of the Board’s report that focuses on the administrative changes needed in the disability program referred to above. That report incorporated a number of findings and recommendations relating to the way in which the public could be better served during the disability application process. The Board’s focus on service delivery will be broader than the service issues included in the disability report.

The Board has had briefing sessions by agency officials on service to the public issues. It has begun a series of meetings with field office officials on these issues. Meetings with SSA officials, as well as a public hearing, were held in California in January 1998. Additional meetings were held in Philadelphia in May 1998. In conjunction with another round of such meetings, a public hearing was held in Dallas on September 23, 1998, at which members of the public and representatives of public organizations were asked to provide their views and perspectives on these issues.

The Board’s intensive study of service delivery issues will continue into 1999 and beyond and will result in reports on various aspects of this important subject.

E. Public Understanding of Social Security

The law charges the Board with “increasing public understanding of Social Security.” As a part of its study of ways in which SSA could facilitate greater understanding of its programs, the Board held a number of meetings with agency officials and others. A report, “Increasing Public Understanding of Social Security,” was issued in September 1997. In this report SSA was urged to develop and implement a comprehensive plan for increasing public understanding, including finding new ways to reach the general public, targeting segments of the public where understanding is weak, and committing adequate resources for the job.

As part of its work on increasing public understanding of Social Security, the Board is following closely the implementation of the requirement in the Omnibus Budget Reconciliation

Act of 1989 (further amended in 1990) that requires SSA to send a personal earnings and benefit estimate statement to everyone age 25 and older who is covered by Social Security. Because of its universal distribution, this statement has the potential to be an extremely useful educational document. This statement of the individual earnings covered by Social Security and the projected benefits for each worker is an important source of information for the public about the program in general and about how it affects them individually. However, in its report on increasing public understanding of Social Security, the Board noted that SSA needs to improve both the content and format of the current statement. It recommended that the agency make this statement one of its highest priorities and ensure that it is as useful, accurate, and readable as possible. The Board has monitored the development of a revised statement and has met with SSA staff to discuss the content and manner of presentation of the information in it.

F. Policy Development, Research, and Program Evaluation

The Board's statutory mandate includes "making recommendations with respect to a long-range research and program evaluation plan for the Social Security Administration." A major concern of the Board is the lack of capacity in recent years for in-depth policy development, research, and program evaluation by SSA. The Board's first report, "Developing Social Security Policy: How the Social Security Administration Can Provide Greater Policy Leadership," focused on this topic. A key element in making good public policy is having available the necessary information on which to base judgments.

In June 1997, the Board sponsored a forum on a long-range research and program evaluation plan for the Social Security Administration. Experts in retirement and survivors issues, disability issues, and research design met in Washington to discuss recommendations for what should be included in SSA's research and program evaluation plan. The findings of this forum were reflected in the Board's January 1998 report on this topic. That report, "Strengthening Social Security Research: The Responsibilities of the Social Security Administration," put forward a number of recommendations for steps SSA should take to improve the quality of its research, including:

- 1) development and implementation by the agency of a comprehensive long-range research and program evaluation plan. The plan should be a high priority of the agency and should be designed with the goal of improving the information and analyses that it provides to policy makers and the public. In developing the plan, the agency should consult with the Congress, other government agencies, the Advisory Board, and others;
- 2) enhancement of the agency's capacity for research and evaluation by including a multi-year approach for recruiting additional staff with the requisite knowledge and skills; making the research office a part of the new policy office; focusing recruiting on the areas where the needs are greatest; accelerating efforts to build a strong program evaluation capacity; and developing the flexibility to do both large-scale

and smaller studies that focus on specific program features, specific populations, or emerging policy issues requiring quick turn-around;

- 3) encouraging outside research by including in its long-range research and program evaluation plan specific steps that it will take to accomplish this; and by directing more resources to promoting outside research; and
- 4) improving the quality and availability of data by making greater use of administrative data and increasing the availability of such data to outside researchers; supporting the collection of survey data and expanding its linkage with administrative data; and taking steps to insure privacy while easing access by outside researchers to administrative data and improving linkages of administrative and survey data.

The report also analyzed areas in which such research should be conducted to help policy makers develop a comprehensive agenda for the future of the OASDI and SSI programs. In regard to retirement issues, these areas included study of the multiple sources of income for the elderly, the Social Security benefit structure, the economic effects of Social Security and of Social Security reform proposals, experience in other countries, and administration of the Social Security and SSI programs. The report also included recommendations for research with respect to the disability programs, including DI and SSI program growth, disability program administration, employment and rehabilitation for disabled beneficiaries, the relationship of health care and support services to the DI and SSI programs, disabled children and younger disabled adults under SSI, and disability among targeted populations.

G. Administration of SSA's Programs

The Board is concerned that the OASDI and SSI programs be properly administered. The Board has expressed concern that the agency's workforce is aging (57 percent of employees are over age 45), and the agency will face large numbers of retirements over the coming decade. Steps will have to be taken if the agency is to have the stable and competent workforce that it will need to respond to the workload created by the aging of the baby boom generation and the growing disability rolls.

The Board is concerned that the agency have adequate budgetary resources to insure proper administration. In February 1998, the Board met with SSA officials to review the agency's budget request as it was sent forward to the Congress. In several of its reports, the Board has indicated that certain activities of the agency are of such vital importance that additional resources should be provided for them.

Improving the policy making, research, and program evaluation capacities of the agency is necessary in order to help policy makers understand how these programs operate and the impact of possible changes. Unfortunately, in a period of budgetary constraint, these areas in particular experienced disproportionate reductions in staff. The Board has been pleased to see that SSA has begun to move some additional staff and money into these areas.

The Board has also expressed its view that more staff is needed to respond to problems in the disability programs. The Congress has provided additional money to accelerate the processing of Continuing Disability Reviews, but there are critical shortages in the Office of Disability, which has the core responsibility for developing and implementing policy for the disability programs.

Another area in which the Board has seen the need for greater resources is in SSA's efforts to better inform the public about the nature of the programs and the issues surrounding them. In an era when the public's confidence in Social Security has been seriously eroded, it is especially important that the agency make every effort to insure that the public understands the programs and how they operate.

The programs administered by the Social Security Administration are vital to the well-being of the American public. The agency needs the resources to ensure that these programs are administered accurately and fairly and that the service the public receives is of high quality.

IV. Board Operations and Communications

Meetings — In fiscal year 1998, the Board met 10 times for the purpose of gathering and evaluating information about various aspects of the OASDI and SSI programs and for drafting reports.

Public Hearings — The Board conducted two public hearings. In January 1998, in San Francisco, the Board heard testimony on 1) improving the quality of service to the public, 2) past experience and future prospects for employment for the disabled, and 3) strategies to encourage employment for the disabled. A second public hearing was held in September 1998, in Dallas, to hear testimony regarding how SSA can improve its service to the public.

Reports — During 1998 the Board issued three reports: 1) "Strengthening Social Security Research: The Responsibilities of the Social Security Administration," 2) "Social Security: Why Action Should Be Taken Soon," and 3) "How SSA's Disability Programs Can Be Improved." In the prior fiscal year the Board issued three additional reports: 1) "Developing Social Security Policy: How the Social Security Administration Can Provide Greater Policy Leadership," 2) "Forum on a Long-Range Research and Program Evaluation Plan for the Social Security Administration: Proceedings and Additional Comments," and 3) "Increasing Public Understanding of Social Security."

Testimony — In October 1997, during his confirmation hearing, the Chair testified before the Senate Committee on Finance on the role of Advisory Board. On March 12, 1998,

the Chair also provided testimony for the House Committee on Ways and Means hearing on the “Challenges Facing the New Commissioner of the Social Security Administration.” He discussed the need for a good working relationship between the Board and the agency in order to assure that the leadership structure that Congress created for Social Security will work effectively. The Chair expressed the Board’s strong belief in a bipartisan approach to Social Security. He also discussed the work of the Board with respect to policy development, increasing public understanding of Social Security, strengthening research and program evaluation, service to the public, and disability.

Establishment of Website — The Board established a home page on the Internet (www.ssab.gov) to make information widely available to the public about the Board’s activities and to provide wide access to its reports.

Adoption of By-laws — The Board drafted and adopted a set of by-laws for its future operations. The by-laws establish rules for the conduct of Board meetings, the approval of reports, and other operations of the Board.

V. Board Visits to Field Sites

1. Dallas, Texas, September 21-23, 1998

The Board met with officials of the Regional Office, Area Directors, managers and employees of field offices, an official from the Regional Hearing Office, and officials of the Teleservice Center to discuss SSA's service to the public.

The Board also held a public hearing on how the Social Security Administration can improve its service to the public.

2. Harrisburg, Pennsylvania, June 24, 1998

The Chair and members of the staff met with the Administrator and other officials of the Pennsylvania Bureau of Disability Determination to discuss issues related to the disability programs.

3. Philadelphia, Pennsylvania, May 13, 1998

The Board met with officials of the Regional Office, the Area Directors, the regional Chief Administrative Law Judge and other Hearing Office personnel, managers and employees of a field office, the Program Service Center, and the Telecommunications Center to discuss SSA's service to the public.

4. Los Angeles and San Francisco, California, January 12-14, 1998

The Board met with officials of the Regional Office, managers and employees of several field offices, the Program Service Center, Administrative Law Judges in the Oakland Hearing Office, officials of the California Disability and Adult Programs Division, and other State and local government officials to study the Supplemental Security Income program with an emphasis on disability.

The Board also held a public hearing in San Francisco on 1) improving the quality of service to the public, 2) employment for the disabled: past experience and future prospects, and 3) strategies to encourage employment for the disabled.

5. Towson, Maryland, November 6, 1997

Board staff met with the Director and other officials of the Maryland Disability Determination Services, and Administrative Law Judges in the Baltimore Hearing Office.

6. Madison, Wisconsin, September 30-October 1, 1997

Board staff met with the Director and other officials of the Wisconsin Disability Determination Bureau, the Wisconsin Division of Vocational Rehabilitation, the Wisconsin Office of Strategic Finance, the Wisconsin Employment Services, SSA's Area Director for Wisconsin, and Administrative Law Judges of the Milwaukee Hearing Office.

7. Raleigh, North Carolina, August 20, 1997

Board staff met with the Administrator and other officials of the North Carolina Disability Determination Services and the North Carolina Division of Vocational Rehabilitation Services.

8. Harrisburg, Pennsylvania, August 14, 1997

Board staff met with the Administrator and other officials of the Pennsylvania Bureau of Disability Determination and the Pennsylvania Office of Vocational Rehabilitation, and Administrative Law Judges in the Harrisburg Hearing Office.

9. Atlanta, Georgia, July 23, 1997

Board staff met with the Director and other officials of the Georgia Disability Adjudication Section, and Administrative Law Judges in the Chamblee Hearing Office.

10. New York, New York, July 17, 1997

Board staff met with officials of the Regional Office of the New York Division of Disability Determination Services, and Administrative Law Judges in the Manhattan Hearing Office.

11. Washington, D.C., April 11, 1997

The Board met with the Chief and other officials of the Washington, D.C. Disability Determination Division.

12. Boston, Massachusetts, August 15-16, 1996.

The Board met with officials of the Regional Office, managers and employees of two field offices, the regional Chief Administrative Law Judge and other Hearing Office personnel, Commissioner of the Massachusetts Rehabilitation Commission and other

officials, and the Deputy Commissioner and other officials of the Massachusetts Disability Determination Services.

VI. Reports and Publications of the Board

1. *How SSA's Disability Programs Can Be Improved*, August 1998.
2. *Social Security: Why Action Should Be Taken Soon*, July 1998.
3. "Statement on the Supplemental Security Income Program," Additional Statement by the Social Security Advisory Board in the *Annual Report of the Supplemental Security Income Program*, Social Security Administration, May 1998.
4. *Strengthening Social Security Research: The Responsibilities of the Social Security Administration*, January 1998.
5. *Increasing Public Understanding of Social Security*, September 1997.
6. *Forum on a Long-Range Research and Program Evaluation Plan for the Social Security Administration: Proceedings and Additional Comments*, June 24, 1997.
7. *Developing Social Security Policy: How the Social Security Administration Can Provide Greater Policy Leadership*, March 1997.

Reports of the Board are available on its website at www.ssab.gov

VII. Members of the Board

Stanford G. Ross, Chair

Stanford Ross is a partner in the law firm of Arnold & Porter, Washington, D.C. He has dealt extensively with public policy issues while serving in the Treasury Department, on the White House domestic policy staff, as Commissioner of Social Security, and as Public Trustee of the Social Security and Medicare Trust Funds. He is a Founding Member and a former Director and President of the National Academy of Social Insurance. Mr. Ross has provided technical assistance on Social Security and tax issues under the auspices of the International Monetary Fund, World Bank, and U.S. Treasury Department to various foreign countries. He has taught at the law schools of Georgetown University, Harvard University, New York University, and the University of Virginia, and has been a Visiting Fellow at the Hoover Institution, Stanford University. He is the author of many papers on Federal taxation and income security subjects. Term of office: October 1997 to September 2002.

Jo Anne Barnhart

Ms. Barnhart is a political and public policy consultant to State and local governments on welfare and social services program design, policy, implementation, evaluation, and legislation. From 1990 to 1993 she served as Assistant Secretary for Children and Families, Department of Health and Human Services, overseeing more than 65 programs, including Aid to Families with Dependent Children, the Job Opportunities and Basic Skills Training program, Child Support Enforcement, and various child care programs. Previously, she was Minority Staff Director for the U.S. Senate Committee on Governmental Affairs, and legislative assistant for domestic policy issues for Senator William V. Roth. Most recently, Ms. Barnhart served as Political Director for the National Republican Senatorial Committee. Terms of office: March 1997 to September 1998 and October 1998 to September 2004.

Lori L. Hansen

Ms. Hansen is a Policy Analyst at the National Academy of Social Insurance. She was a Technical Assistant to former Social Security Commissioner Robert Ball in his capacity as a member of the National Commission on Social Security Reform. She was also a Special Assistant to the President and Director of Government Affairs at the Legal Services Corporation. In addition, Ms. Hansen was a senior professional staff member on the U.S. Senate Committee on Labor and Human Resources, Subcommittee on Employment, Poverty, and Migratory Labor, and was legislative assistant to Senator Gaylord Nelson, then Chairman of the Subcommittee on Social Security of the Senate Committee on Finance. She also served on the professional staff of the Senate Select Committee on Nutrition and Human Needs. Term of office: October 1994 to September 2000.

Martha Keys

Martha Keys served as a U.S. Representative in the 94th and 95th Congresses. She was a member of the House Ways and Means Committee and its Subcommittees on Health and Public Assistance and Unemployment Compensation. Ms. Keys also served on the Select Committee on Welfare Reform. She served in the executive branch as Special Advisor to the Secretary of Health, Education, and Welfare and as Assistant Secretary of Education. She was a member of the 1983 National Commission (Greenspan) on Social Security Reform. Martha Keys is currently consulting on public policy issues. She has held executive positions in the non-profit

sector, lectured widely on public policy in universities, and served on the National Council on Aging and other Boards. Ms. Keys is the author of *Planning for Retirement: Everywoman's Legal Guide*. Term of office: November 1994 to September 1999.

Sylvester J. Schieber

Mr. Schieber is Director of the Research and Information Center at Watson Wyatt Worldwide, where he specializes in analysis of public and private retirement policy issues and the development of special surveys and data files. From 1981 to 1983 Mr. Schieber was the Director of Research at the Employee Benefit Research Institute. Earlier, he worked for the Social Security Administration as an economic analyst and as Deputy Director at the Office of Policy Analysis. Mr. Schieber is the author of numerous journal articles, policy analysis papers, and three books including: *Retirement Income Opportunities in An Aging America: Coverage and Benefit Entitlement*, and *Social Security: Perspectives on Preserving the System*. He served on the 1994-1996 Advisory Council on Social Security. He received his Ph.D. from the University of Notre Dame. Term of office: January 1998 to September 2003.

Members of the Staff

Margaret S. Malone, Staff Director

Peggy S. Fisher
Joyce Manchester
Beverly Rollins
Wayne Sulfridge
Jean Von Ancken

Social Security Advisory Board
400 Virginia Avenue, SW
Suite 625
Washington, D.C. 20024
Tel: (202) 475-7700
Fax: (202) 475-7715

Website: www.ssab.gov