

Fiscal Year 2024 Annual Report

Social Security Advisory Board
February 2025

Bob Joondeph, Chair
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Acronyms and Abbreviations

Acronyms Abbreviations	Term
Act	Social Security Act
ALJ	Administrative Law Judge
Board or SSAB	Social Security Advisory Board
CIO	Chief Information Officer
DDS	Disability Determination Services
DI	(Social Security) Disability Insurance
FRA	Full Retirement Age
FY	Fiscal Year
GAO	Government Accountability Office
IT	Information Technology
NADE	National Association of Disability Examiners
NCDDD	National Council of Disability Determination Directors
NCSSMA	National Council of Social Security Management Associations
OASDI	Old Age, Survivors, and Disability Insurance
PC	Processing Center
RET	Retirement Earnings Test
SSA	Social Security Administration
SSI	Supplemental Security Income

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Message from the Chair

In Fiscal Year 2024, the Social Security Advisory Board (SSAB or “Board”) continued to pursue its mission to educate and inform policymakers, Social Security, and the public about Social Security programs and the potential challenges the agency faces in administering these complex programs. In the first quarter of the year, the Board released a study of the Social Security Administration’s (SSA) Retirement Earnings Test, which discussed its ease of use for potential retirees and considered its effectiveness given the many non-traditional and varied paths to retirement now used by older workers. On December 20, 2023, Martin O’Malley was sworn in as the Commissioner of Social Security, and the Board met with the new Commissioner in February to discuss his priorities for the agency and ways in which the Board could help to advance improvements at SSA. That month, the Board also released a study on the Effectuation of Disability Benefits, which examined a growing backlog of disability awardees who were waiting to receive their benefits after they had been approved.

On March 1, 2024, the Board lost its quorum. According to its authorizing statute, “four members of the Board (not more than three of whom may be of the same political party) shall constitute a quorum for purposes of conducting business.” Because only four of the Board’s seven seats were filled during the past year, and one of those member’s reappointment was delayed until June 21, 2024, the Board was left without a quorum for 113 days. While SSAB has not had a full seven-member Board since 2016, this is only the second time in the Board’s history that it lost a quorum for an extended period, and it caused Board research, business, and published reports to be delayed, pushing many over into FY 25. Background work continued, however, because the Board sets an annual research agenda at the beginning of each fiscal year and has dedicated professional staff to research and advance the Board’s priorities even in the absence of a quorum. This allowed us, in the final quarter of FY 24, to hold our regular July Board meeting, host a public event on Supplemental Security Income (SSI) and Incarceration, release our FY 23 Annual report, and set an ambitious research agenda for FY 25.

This work would not have been possible without the skill and perseverance of Board staff. Board members also acknowledge and thank the many dedicated SSA employees, advocates, and experts who share their knowledge, expertise, and valuable time to inform our work.

Bob Joondeph

Bob Joondeph, Board Chair

About the Board

The Board was established when Social Security became an independent agency in 1994. Its mission is to analyze the nation's retirement and disability programs and advise the President, Congress, and the Commissioner of Social Security on matters of policy and administration of the Old-Age Survivors and Disability Insurance (OASDI) and SSI programs.

Board members are appointed by the President and Congress based on their integrity, impartiality, and good judgment, as well as their education, experience, and achievements.¹

Each year, the Board identifies topics for examination and associated deliverables, including Board publications, commissioned work, public events, summaries, comments, and letters posted on the Board's website.

The Board's authorizing statute outlines the following nine functions:

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;
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

¹ 42 USC 903 (c) (2)

9. making recommendations with respect to such other matters as the Board determines to be appropriate.

Summary of the Board's FY 24 Work

The Board examines Social Security policy and program administration as part of its mission. The following summarizes the Board's substantive publications, Board meeting topics, and public events. The complete reports and public meeting agendas are on the Board's [website](#).

Retirement Portfolio

Retirement Trajectories and Social Security's Retirement Earnings Test

Social Security is designed as an insurance program to partially replace insured workers' wages that are lost due to old age, disability, or death (for surviving dependents). Social Security's Retirement Earnings Test (RET), which has been part of the law since Social Security's creation in 1935, was intended to determine whether a worker had left the workforce. However, "leaving the workforce" has changed over time, with people taking diverse paths out of the labor force and varied routes to retirement, many of which involve reentering the workforce after retiring. Workers need reliable information on Social Security retirement benefits and policies such as the RET to make informed choices, yet as the Board began examining the issue, it found that the RET is poorly understood by the public.

On December 14, 2023, the Board released [Retirement Trajectories and Social Security's Retirement Earnings Test](#), a paper that examines the RET in the context of today's changing work and retirement patterns. The report begins by describing the mechanics of the RET, which reduces or withholds the benefits of people who choose to collect Social Security before attaining Full Retirement Age (FRA) and who work and earn above a certain dollar threshold while receiving benefits. Monthly benefits are later increased when a person reaches FRA to account for the months when benefits were withheld or reduced so that over an average lifetime, a person will recoup all of the benefits withheld due to the RET. While many know that benefits are reduced due to earnings before FRA, most people do not understand that the reduction is temporary.

As part of its research, the Board analyzed baby boomers' retirement patterns using microdata from a nationally representative survey conducted every two years of Americans ages 50 or older and their spouses. The Board constructed a descriptive overview of the many retirement trajectories in the cohort and found that over half of the early baby boomer cohort followed a nontraditional retirement path involving either partial retirement or a return to work before permanently leaving the labor force. Half of that group collected Social Security retirement benefits before returning to work and may have been subject to the RET.

Understanding the RET should allow workers and retirees to make fully informed decisions about when to claim their Social Security retirement benefits, whether to return to work before FRA if already collecting retirement benefits, and when to stop working permanently. SSA provides several resources to educate the public about the RET. However, the paper demonstrates that not all these resources clearly explain the key features of the RET, and not all the information is conveyed consistently across resources. SSA could improve these materials to communicate the implications of work and retirement more clearly to workers and their families. Reminding workers how the RET operates at various points during their careers could help improve awareness of its potential applicability for those who follow non-traditional retirement paths.

Recommendations

The Board concludes the report by offering the following recommendations:

- While SSA's materials on the RET provide information for workers and their families seeking to understand how earnings affect retirement benefits, not all these public resources clearly explain key features of the RET, and not all the information is conveyed consistently across resources. With additional research, SSA could improve these materials to communicate the implications of work and retirement more clearly to claimants and beneficiaries.
- In addition, some helpful tools, such as the RET calculator and program explainer visualization, are not consistently included in SSA's RET materials or provided to workers and beneficiaries. SSA could review how these tools and web pages interact to ensure that these materials are consistent and easily accessible.
- SSA could test simpler language to ensure the RET is accurately explained. It could then consistently use this easily understandable language across all its public-

facing RET materials. It could also urge the public to think about the impact of the timing of initial benefit collection on the benefit amount for the remainder of their lifetimes.

- The RET calculator may be confusing. For instance, it is unclear whether users should enter their monthly or annual earnings in “Your estimated earnings” in the RET calculator.
- SSA should ensure that field office staff are aware of these materials and tools and provide them to beneficiaries when relevant. Although field office technicians are supposed to explain the RET when it applies, this does not always happen consistently across field offices. SSA could also examine whether training for field office staff regarding how to talk to beneficiaries about the RET is adequate. Furthermore, SSA may wish to consult with field office staff as they revise these resources and training to ensure that they fit the needs of staff and beneficiaries.
- SSA should also ensure that people applying online have access to information on the RET while completing the online application.
- SSA provides a retirement calculator through my Social Security, which allows users to input their retirement age, average annual salary, and spousal benefit information and view their retirement benefit amount at any age. This calculator does not account for work while receiving retirement benefits that could lead to a RET adjustment. Providing more prominent information about the RET on my Social Security could be helpful.
- SSA could also urge the public to think about the impact of the timing of initial benefit collection on the benefit amount for the remainder of their lifetimes. SSA may want to keep the varied retirement paths in mind as it proceeds with new initiatives targeted at people nearing retirement.
- Increased exposure at various points in workers’ careers, especially as they approach retirement, could help improve awareness of RET’s potential applicability.

Disability Portfolio

Social Security's Effectuation of Disability Benefits

SSA's disability programs administer benefits that provide economic security to millions of people. Social Security Disability Insurance (DI) provides cash benefits to insured workers and their families in the event of disability. SSI provides disability payments to people who meet the program's income and resource limits and meet the statutory definition of disability or blindness. The process of adjudicating an application for disability benefits is not complete once a favorable decision has been made. Many additional steps must occur between a favorable decision and the actual benefit payment, a process SSA calls "effectuation."

Effectuation is a rarely studied and poorly documented process, however, it matters greatly to awardees since the disability determination process is not over from an awardee's perspective until benefits are received. Effectuation also matters to SSA; it is a large, important, varied, and often complicated workload involving multiple SSA components, employees, and computer systems. SSA issued approximately 900,000 favorable disability decisions in each of the last three fiscal years, all of which needed to be effectuated, and effectuation errors can cause overpayments or underpayments that are time-consuming for the agency to resolve and cause financial damage to the recipients.

On February 29, 2024, the Board released [Effectuation of Disability Benefits](#), a report that provides a detailed overview of SSA's effectuation process. The report highlights effectuation's complications and explains how the process can differ depending on the type of benefits claimed or the stage of appeal when the claim was awarded. SSA's effectuation process has three phases:

- (1) Claims are sent from the part of the agency that made the favorable disability determination (the adjudicator) to the part that will effectuate it (the effectuator). The pathway depends on whether the claim is for SSI and/or DI and whether it was awarded at the initial level or after one of the various opportunities for appeal.
- (2) The effectuator gathers and inputs information to determine what retroactive and ongoing benefits should be paid. In most cases, this occurs quickly through an automated process. However, some claims are more complex, requiring manual calculations, the use of numerous computer systems, and communications with the awardee and others within and outside SSA.
- (3) SSA works with the Treasury Department to deposit the benefits.

For every favorable decision, the effectuator must consider:

- Who should be paid?
 - Besides the awardee, certain family members may be eligible for ongoing benefits as “auxiliaries”
 - When a claimant or awardee dies before effectuation is complete, past-due benefits may still be payable to relatives or estates
 - Others to whom SSA might pay a portion of benefits include the claimant’s representative and state and local welfare agencies
- What amount should be paid?

The benefit amount for which a person qualifies depends on many factors and may change monthly, along with the awardees’ financial and other circumstances. There are also annual cost-of-living adjustments.
- Who will manage the benefit money?

SSA may first need to assign a representative payee if awardees are found unable to manage their funds
- When do benefits start?

Awardees may be eligible for benefits for months before a favorable decision is issued, called retroactive or past-due benefits.
- Where should benefits be deposited?

In nearly all cases, SSA and the Treasury Department work together to send benefits electronically, either to a bank account or onto a prepaid debit card.

The Board used a data set of awarded cases from a firm of claimant representatives to analyze changes in effectuation times. Most DI awards in the data set were effectuated within a week of the decision, while the median time for SSI awards grew from 20 days in 2014 to 77 days in early 2023. Some cases took far longer to effectuate for both types of benefits, and data shows that average effectuation times have increased over the past decade.

The following are recommendations generated from this study for changes SSA could make to its systems, policies, and operations to improve the speed and accuracy of effectuation. Although this report focuses on the effectuation of favorable decisions in DI and SSI claims (including concurrent claims for both), its recommendations apply more

broadly since much of the effectuation process is the same for all benefits SSA administers.

- Shift workloads and promulgate best practices across Processing Centers and Regional Trust Review Teams.
- Add Representative Call Centers to more Processing Centers.
- Automate more effectuation workloads.
- Use employee feedback when continuing to upgrade computer systems.
- Simplify how changes to claimants' and awardees' contact information are reported and recorded.
- Improve how documents are submitted, input, stored, and retrieved.
- Provide more effectuation-related features in my Social Security and Appointed Representative Services.
- Create an electronic form that allows awardees and their representatives to submit information needed to effectuate SSI claims.
- Identify and study effectuation-process pain points focusing on especially challenging claims.
- Set more comprehensive performance goals for effectuation.
- Consider best practices from other agencies' effectuation processes.
- Ensure appointed representatives can assist their clients and receive notices throughout the effectuation process.
- Improve Notices of Award by generating more notices automatically, alerting effectuators when notices have not been sent, sending fewer notices after benefits are paid, and providing information about effectuation.

- Provide more information to representatives about typical timeframes for different parts of the effectuation process and how they could help resolve delays.
- The Board also recommends that Congress require SSA to pay interest on past-due benefits when there are delays in effectuation.

SSI Portfolio

2024 Roundtable on SSI and Incarceration

Public Law 104-193, The Personal Responsibility and Work Opportunity Act of 1996, permits members of the Board, individually or collectively, to include their views in SSA's Annual Report of the SSI Program to the President and Congress. Since 1998, the Board or one of its members has submitted a statement each year. Due to the lack of quorum, the Board was unable to meet SSA's publication deadline for FY 24. Instead, the Board held a public event on the topic of SSI and Incarceration and will publish the report in FY 25.

[SSAB Hosts a Roundtable on Supplemental Security Income and Incarceration](#)

The Board's virtual "SSI and Incarceration" roundtable was held on September 9, 2024. The roundtable informed the Board's research on SSI and incarceration by presenting experienced professionals who work in correctional facilities, legal service programs, and other settings where they help people navigate SSI applications and requests for replacement Social Security cards. Panelists shared their experience in providing direct services to people who are or have been incarcerated or discussed their involvement in providing training, supervision, and technical assistance to those who assist incarcerated people returning to society.

Following opening remarks by the Chair, Stacy Cloyd, Senior Research Attorney for the Board, provided a brief overview of the relevant law and policy when SSI recipients are incarcerated. She then moderated a discussion on the state process and complications around applying for, receiving, or resuming suspended SSI benefits for individuals re-entering society after incarceration. The discussion also included replacement Social Security cards for those exiting incarceration, which are deemed critical for successful reintegration. A video of the full event and bios of each panelist are available on the Board's [website](#).

FY 24 Board Meeting Briefing Topics and Participants

The Board's authorizing statute requires it to meet at least four times per year. The Board met for four full days in FY 24 and held a public event. In addition to these meetings, the Board met to discuss projects and met with the Commissioner as needed. From March 1 to June 21, 2024, the Board was unable to meet due to the lack of quorum, which forced the cancelation of the March and May Board meetings.

These meetings are critical in supporting the Board's current and future research projects, and they inform the Board's perspective on SSA's operations and success in communicating and implementing its priorities with different groups. Below is a brief synopsis highlighting some topics explored in those meetings. Among others, the Board received briefings from SSA executives, Administrative Law Judges (ALJs), SSA's management associations, outside advocates, and stakeholders. The Board also met multiple times with Martin O'Malley, the Commissioner of Social Security, to discuss his priorities for the Agency. See Appendix A for a complete list of Board meetings and presenters.

January Board Meeting

SSI Children: Two advocates with expertise on children's disabilities briefed the Board on the children's SSI program, including declines in application rates (particularly since the pandemic), racial disparities, SSA outreach efforts, and the lack of an online SSI application for children.

Hearing Offices: The Board met with the ALJ union (the International Federation of Professional and Technical Engineers, AFL-CIO), which represents over 1,000 non-supervisory SSA ALJs, to discuss case backlogs and assignments and other significant issues related to the hearings level that they believe the new Commissioner should prioritize.

Electronic Signatures: SSA's Office of Transformation briefed the Board on the eSignature/eSubmit initiatives, which aim to assess and expand the use of electronic signatures in agency processes.

July Board Meeting

IT Systems: The Board met with the new SSA Deputy Commissioner and Chief Information Officer (CIO) and her staff to hear about agency priorities related to Information Technology (IT) and systems modernization.

GAO: The Board met with the Director of Information Technology and Cybersecurity at the Government Accountability Office (GAO), which oversees audits on critical infrastructure protection, to learn about GAO’s oversight of SSA IT and systems modernization efforts.

DDS Concerns:

National Association of Disability Examiners - DDS Concerns: The Board met with the leadership of the National Association of Disability Examiners (NADE) to learn about the top priorities and concerns of DDS examiners, specifically related to IT, SSA modernization plans, and its use of Artificial Intelligence in the disability determination process.

National Council of Disability Determination Directors (NCDDD) - DDS Concerns: The Board met with the leadership team of NCDDD to learn about current issues and concerns at the DDS. NCDDD demonstrated processing a disability claim to show the internal steps and multiple systems involved in the disability determination process. NCDDD provided its perspective on SSA’s commitment to including the DDSs in its IT planning and modernization efforts.

National Council of Social Security Management Associations (NCSSMA): Field Office Managers: The Board met with NCSSMA Field Office Managers to learn about current issues and concerns in SSA field offices and teleservice centers and ask questions related to early retirement and disability claims.

September Board Meeting

Public Event: virtual “SSI and Incarceration” roundtable

Board Appointments, Nominations, and Current Members

House Re-Appointment: Nancy Altman

Nancy Altman, of Bethesda, Maryland, was [reappointed](#) by the House of Representatives to the Social Security Advisory Board.

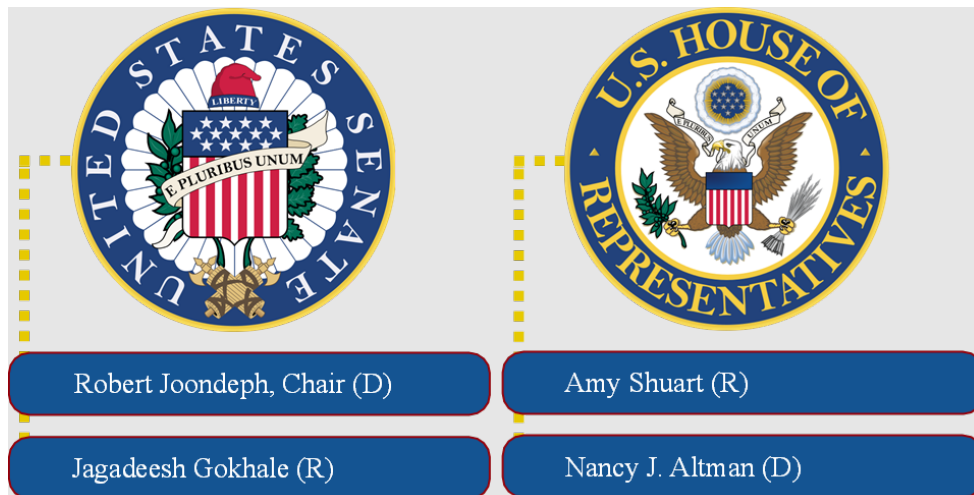
White House Nominations

In FY 23, President Biden renominated Andrew Biggs and Sharon Lewis, both of Oregon and Kathryn Lang of Maryland, to serve on the Board. The Senate Finance Committee held a hearing on January 31, 2024, to consider the three nominees. The nominees were not voted out of committee, and the nominations were returned to the President at the end of the 118th Congress. For a full history of Board member appointments, see the [Board Members page](#) on the website.

FY 24 Board Members and Open Seats

The Board may have as many as seven members. Two Board members are chosen by the House of Representatives, one from each party, and similarly, two Board members are chosen by the Senate. The remaining three Board members are Presidential appointments. Throughout most of FY 24, there were four members: two appointed by the Senate and two appointed by the House. Nancy Altman’s term expired on March 1, 2024, and she was not reappointed until June 21, 2024. During those 113 days, the Board had only three serving members, and no quorum was present.

The graphic below shows the Board members in FY 24.



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



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 2 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 6 years, except when 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.

Current Board Members



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.



Nancy J. Altman, JD, has a fifty-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 a member of Harvard University’s Kennedy School of Government faculty 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* and 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.



Jagadeesh Gokhale, PhD, is the Director of Special Projects at Wharton Budget Model. Prior to joining Wharton, he 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 has also been published in numerous professional journals and newspapers, such as *The Wall Street Journal*, *The Financial Times*, *The Washington Post*, and *Forbes*.



Amy Shuart has over 15 years of experience in Social Security, identity, and technology policy. Shuart is currently the Vice President, Technology & Innovation at Business Roundtable. She previously was the Head of North America Government Affairs for Onfido, a global digital identity company, where she launched their Washington office. For over a decade, Shuart worked for the Committee on Ways and Means, most recently as the

Social Security Subcommittee Staff Director. Shuart started her career as a Presidential Management Fellow at the Social Security Administration 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. Shuart 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.

Appendices

Appendix A - FY 24 Board Meetings and Public Sessions

In FY 24, the Board met with SSA leadership, including the new Commissioner, SSA staff, management associations, ALJs, and experts from both the private and public sectors. 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.

January 25 – 26, 2024

On **January 25**, the Board met in Executive session.

- Jonathan Stein, Of Counsel, Community Legal Services
- Darcy Milburn, Director of Social Security and Healthcare Policy, The Arc
- Som Ramrup, AALJ President, New York (Varick), NY Hearing Office
- William Ramsey, AALJ Executive Vice President, Boston, MA Hearing Office
- Kimberly Schiro, AALJ Secretary, Bronx, NY Hearing Office
- Stephen Goss, Chief Actuary, Office of the Chief Actuary, SSA
- Karen Glenn, Deputy Chief Actuary, Office of the Chief Actuary, SSA
- David Stepp, Executive Lead for the eSignature/eSubmit initiative
Office of Transformation, SSA

On **January 26**, the Board met in an all-day internal session.

July 18 – 19, 2024

On **July 18**, the Board met in Executive session.

- Marcela Escobar-Alava, CIO, Office of the Chief Information Office, SSA
- Brian Peltier, Deputy CIO, Office of the Chief Information Office, SSA
- Michelle Minton, Associate Commissioner, Office of the Chief Information Office,
Office of Disability Information Systems, SSA
- Ayanna Conley, Quality Assurance Manager, DDS Georgia, President, NADE
- Jennifer Nottingham, Operations Manager, Nevada Bureau of Disability
Adjudication, Past President, NADE

- Jacki Russell, President NCDDD, North Carolina DDS Director
- Brian Garber, President-elect NCDDD, Florida DDS Director
- Leon Scales, Past President NCDDD, Virginia DDS Director
- Elizabeth Slease, Roanoke DDS Director

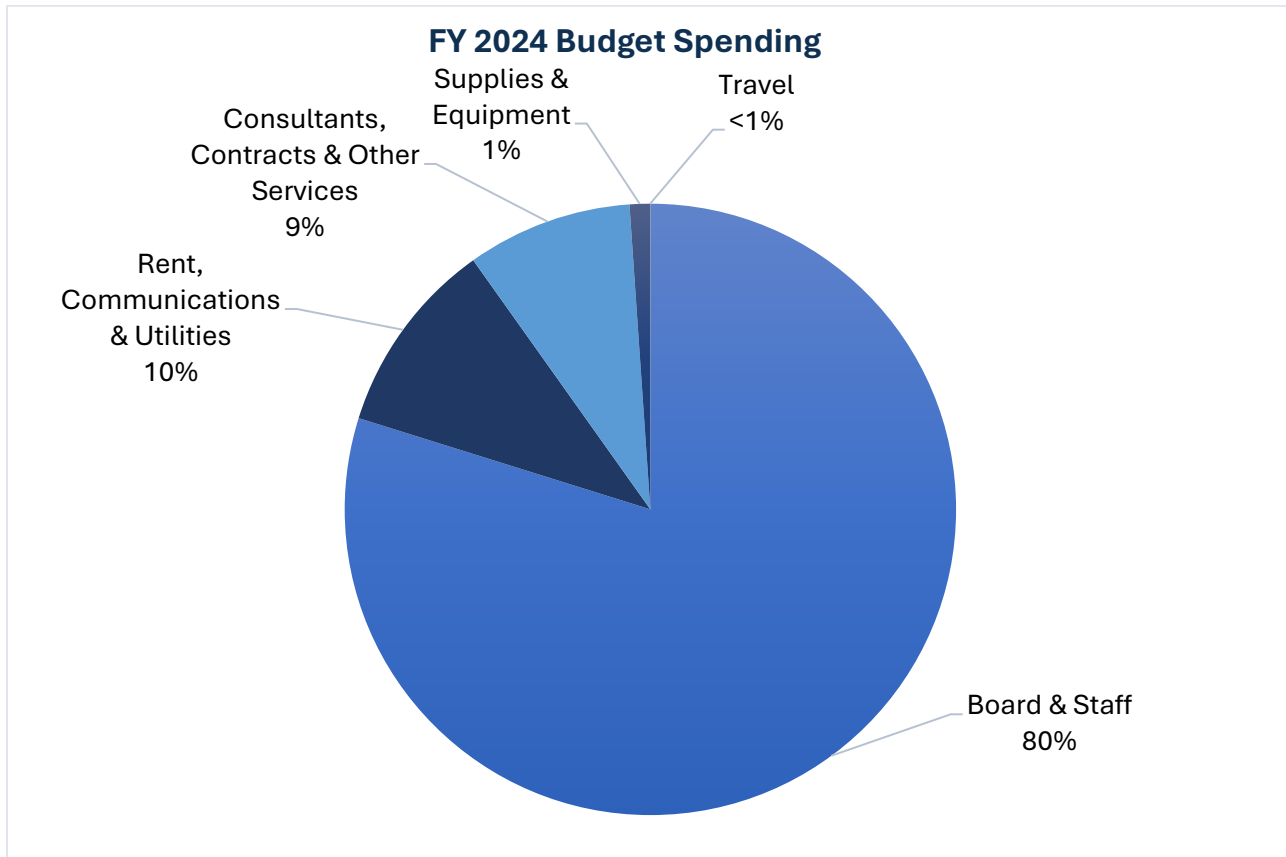
On **July 19**, the Board met in Executive session.

- David Hinchman, Director, Information Technology and Cybersecurity, US Government Accountability Office (GAO)

On **September 9**, the Board hosted a Public Roundtable. The panelists were:

- Ronna Cole, Deputy Assistant Secretary for Health Services, Washington State Department of Corrections
- Karen Duranceau, Project Manager, Washington State Department of Corrections
- Erica Hartwig, Staff Attorney, Community Legal Services of Philadelphia
- Terre Marshall, Director of Complex Reentry Transitions, South Carolina Department of Corrections
- Michele Murff, Director of Housing and Homeless Programs, South Carolina Department of Mental Health
- Trinh Phan, Director of State Income Security, Justice in Aging
- Reverend Ben Roberts, Associate Pastor & Executive Director of Program and Justice Ministries, Foundry United Methodist Church
- Gloria Robinson, Program Analyst, South Carolina Department of Disability Services
- Tammy Seltzer, Director of the Jail and Prison Advocacy Project, University Legal Services, Disability Rights DC
- Dazara Ware, Assistant Director, Substance Abuse and Mental Health Services Administration, SSI/SSDI Outreach, Access, and Recovery Technical Assistance Center

Appendix B - SSAB Budget



FY 2024 Budget Expenditures

Object Class	Amount
Board & Staff	\$ 2,131,614
Rent, Communications & Utilities	\$ 276,040
Consultants, Contracts & Other Services	\$ 233,544
Supplies & Equipment	\$ 28,682
Travel	\$ 487
TOTAL	\$ 2,670,366

The Board's appropriation for FY 24 was \$2.7 million. Expenses reflect the status of funds at the end of the FY.

- The Board and Staff category combines both salaries and benefits and includes interns.
- Expenses in the rent and communications category include rent, government cell phones, UPS, and courier services.

- The Consultants, Contracts & Other Services category consists of contracts, interagency/inter-personnel services, experts, temporary help services, training, conferences, facility, and security services.
- Supplies and equipment include office supplies and subscriptions as well as IT equipment.
- Travel covers transportation expenses associated with local travel and transit benefits.

Appendix C - Staff Bios

Claire Green, Staff Director

Claire joined SSAB in October 2012 as the Deputy Staff Director and became the permanent Staff Director in September 2013. She oversees all aspects of Board work and agency operations. Prior to joining SSAB, Claire worked as a Congressional Fellow for the Senate Finance Committee. Her portfolio included Social Security program and policy issues, administrative budget, and trust fund solvency concerns. Before that, she worked as an attorney in Social Security hearings components, both in hearing offices and later in headquarters. Claire holds a JD from Western State University College of Law and graduated with honors from Assumption College in English and Sociology. She is also a member of the National Academy of Social Insurance.

Sunny Bick, Management Analyst

Sunny Bick joined the Board staff in January 2020 as a Management Analyst.

Sunny has varied responsibilities on both the Operations and Research Teams, including administrative functions, outreach, drafting the agency's Annual Report, and assisting with research projects. Before joining SSAB, Sunny had a research background in molecular biology. Most recently, she worked as a senior researcher in the transgenics lab at the Mayo Clinic's Institute of Neurodegenerative Diseases in Jacksonville, Florida, studying the pathology of Alzheimer's Disease. Her previous work at Stanford University's Hopkins Marine Lab involved marine species' genetic diversity and adaptation to environmental stress. Sunny graduated with honors from the University of Maryland, receiving a BS in microbiology and biochemistry.

Diane Brandt, Research Director

Diane joined SSAB in September 2017 as a Senior Advisor. She assists with planning and conducting research activities in support of the Board's mission. Diane's career with the federal government began in 2008 as a protocol manager for the National Institutes of Health (NIH) Clinical Center, Rehabilitation Medicine Department, Epidemiology and Biostatistics Section. Diane worked principally on an interagency agreement with SSA to support the agency's disability programs. In addition to a diverse clinical background in physical therapy, her research interests include public policy/health policy and implications for vulnerable populations and the geospatial implications of policy outcomes. Diane holds a BS in physical therapy from the University of Missouri – Columbia, an MS specializing in gerontology and neurorehabilitation from Washington University in St. Louis, and an MA and PhD from the University of Missouri – St. Louis in political science, specializing in public and health policy.

Cheri Cannon, General Counsel

Cheri Cannon joined the Board in April 2021. She provides legal advice on personnel policy and processes, fiscal matters, and the interpretation of Board documents and statutes. She also represents the Board with other administrative bodies, serves as the FOIA and Privacy officials, and trains the staff on government-wide requirements. Before joining SSAB, Cheri was a Partner at Tully Rinckey PLLC and head of the Federal Labor and Employment practice. She was the Managing Partner of the DC office for three years. Previously, she served in the Senior Executive Service at the Air Force as Deputy General Counsel for Fiscal, Ethics, and Administrative Law. Cheri was also the Chief Counsel to the Chairman of the Merit Systems Protection Board. Other government service includes 17 years at Small Business Administration, where she served in various senior executive roles. Before joining the government, she was in private practice. She earned a BA in political science (with Honors) from UC Santa Barbara and a JD from Georgetown University Law Center.

Stacy Cloyd, Senior Research Attorney

Stacy Cloyd is a Senior Research Attorney. Stacy joined the Board in July 2022. Her interests include Social Security Disability Insurance, Supplemental Security Income, and how SSA interacts with the public, other federal agencies, and state and local governments. Stacy previously spent seven years at the National Organization of Social Security Claimants' Representatives, departing as the Director of Government Affairs. She has also served as Senior Domestic Policy Analyst at Bread for the World Institute, staff attorney and disability practice supervisor at Bread for the City's legal clinic, and volunteer attorney and mentor at the DC Bar Pro Bono Center. Stacy received an AB magna cum laude in government from Smith College. Her JD (cum laude) and Master of Urban and Regional Planning degrees are from the University of Michigan. She was elected to the National Academy of Social Insurance in 2017.

Bethel Dejene, Management Officer

Bethel Dejene joined the Board staff in June 2014 as a Research Analyst intern and continued as a Research Analyst on a part-time basis. Then she moved to a full-time position as a Management Analyst and is currently the Management Officer. Bethel supports in managing agency operations. Before joining the Board, Bethel was a participant in Capital Area REACH's job-readiness and community service program and completed an internship at the Ethiopian Community Development Council in Arlington, Virginia. Bethel earned a BS in Psychology (cum laude) from George Mason University.

Paul Frazier, IT Systems Engineer

Paul Frazier joined the Board in January 2022 as the Systems Engineer, and is responsible for all aspects of SSAB IT infrastructure, cybersecurity compliance, and SharePoint organization. Before coming to the Board, Paul worked on federal contracts for clients such as the Department of Justice, Centers for Medicare and Medicaid Services, the Federal Judiciary, the US Navy, and the Social Security Administration.

Conway Reinders, Lead Policy Analyst & Communications Officer

Conway Reinders joined SSAB in 2017. His research focuses on issues related to the quality and accessibility of the Social Security Administration's services. Conway also serves as the agency's Communications Officer, coordinating the Board's messaging, external outreach, and public events. Previously, Conway was a research assistant at the Oxford Poverty & Human Development Initiative and a Special Assistant at the Hamilton Project at the Brookings Institution. He holds a BA from the George Washington University, graduating magna cum laude in economics (special honors) and international affairs. In 2021, Conway was elected to the National Academy of Social Insurance.

Conway left SSAB in the summer of 2024 to join the master's program at Princeton University's School of Public and International Affairs.

Jenn Rigger, Senior Advisor

Jenn Rigger joined the Board in March 2015 as a detailee from Social Security. She was later hired as a Senior Advisor. Her areas of focus include the disability determination process, the partnership of SSA and the state Disability Determination Services agencies, and enumeration/death data reporting. With over 30 years in and around the federal government, Jenn worked on the state/federal vocational rehabilitation program while at the Department of Education's Rehabilitation Services Administration and on SSA's support of disability beneficiaries' return-to-work efforts. Jenn's federal career began on Capitol Hill. She holds a BS in political science and history from James Madison University.

Emily Roessel, Senior Researcher

Emily joined the Board in July 2022. Her areas of focus include retirement and financial security. Emily previously worked at the Social Security Administration as a Presidential Management Fellow and then as a Social Science Research Analyst in the Office of Research, Demonstration, and Employment Support. At SSA, Emily conducted research on the return-to-work efforts of Social Security disability beneficiaries. She has also worked at Abt Associates and the Brookings Institution. Emily received a BA in applied math-

economics from Brown University and an MPP from the University of Michigan. She was elected to the National Academy of Social Insurance in 2023.

Omar Shalabi, Data and Program Analyst

Omar Shalabi first came to the Board in September 2019 as a Research Intern and joined as a permanent employee in April 2020. Omar graduated with a BA in Economics from the University of Maryland, completing a research practicum with the strategic advisory and mergers & acquisitions firm Kaulkin Ginsberg. At Kaulkin Ginsberg, Omar studied the student loan market, particularly regulatory changes and loan issuance and collection trends.

About the Board

The Social Security Advisory Board is a bipartisan 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 up to seven members, appointed by the President, Senate, and House of Representatives.



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