



The McCrery-Pomeroy SSDI Solutions Conference

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Tuesday, August 4, 2015

**District Architecture Center
421 7th Street, NW
Washington, DC 20004**

A Project of the



**COMMITTEE FOR A
RESPONSIBLE FEDERAL BUDGET**



**McCrery-Pomeroy SSDI Solutions Conference
Tuesday, August 4, 2015**

8:00 am Continental Breakfast and Registration

8:45 am Location: District Architecture Center
421 7th Street NW
Washington, DC 20004
Tel: 202-347-9403

8:45 am Welcome and opening remarks by Congressmen McCrery and Pomeroy

9:00 am

9:00 am Remarks by Senator Orrin Hatch (R-UT)

9:15 am

9:15 am Panel One: Early Intervention and Work Support

10:30 am Discussant: Lisa Ekman, Ekman Advocates for Progress, LLC

Papers presented:

David Stapleton: "The Employment/Eligibility Service System: A New Gateway for Employment Supports and Social Security Disability Benefits"

Jennifer Christian: "A Community-Focused Health & Work Service"

Julie Kerkstick: "Using Transitional Jobs to Increase Employment of SSDI Applicants and Beneficiaries"

10:30 am Break

10:45 am

10:45 am Panel Two: Structural Reforms

12:00 pm Discussant: Art Spencer, Former Associate Commissioner for Disability Programs, Social Security Administration

Papers presented:

Kim Hildred: "Transitional Benefits for a Subset of the Social Security Disability Insurance Population":

Jason Fichtner: "Beyond All or Nothing: Reforming Social Security Disability Insurance to Encourage Work and Wealth"

Neil Jacobson: "Exploring Alternative Definitions of Disability"

12:00 pm **Lunch and Remarks by Bob Greenstein, President, Center on Budget and Policy**
1:00 pm **Priorities**

1:00 pm **Panel Three: Determination and Adjudication Reform**
2:15 pm **Discussant:** Margaret Malone, Former Staff Director, Social Security Advisory Board

Papers presented:

Jon Dubin: "Eliminating Reconsideration in SSDI's Adjudication Process after 15 Years of Testing, and Enhancing Initial Case Development"

Dale Glendening: "Social Security: Restructuring Disability Adjudication"

Alex Constantin: "Data-Driven Solutions for Improving the Continuing Disability Review Process"

2:15 pm **Break**
2:30 pm

2:30 pm **Panel Four: Interaction with other programs**
3:45 pm **Discussant:** David Wittenburg, Director of Health Research, Mathematica Policy Research

Papers presented:

Mark Meyer: "Expanding Private Disability Insurance Coverage to Help the SSDI Program"

Mark Perriello: "Ensuring Access to Long-Term Services and Supports for People with Disabilities and Chronic Conditions"

John Burton: "Improving the Interaction Between the SSDI and Workers' Compensation Programs"

3:45 pm **Break**
4:00 pm

4:00 pm **Closing panel discussion**
5:00 pm **Moderator:** Paul Krawzak, CQ Roll Call

Participants:

Congressman Jim McCrery

Congressman Earl Pomeroy

Alan Cohen, Member, Social Security Advisory Board

Mark Warshawsky, Former Member, Social Security Advisory Board

5:00 pm **Closing reception**
6:30 pm Location: District Architecture Center



McCrery-Pomeroy SSDI Solutions Conference

Tuesday, August 4, 2015

8:45 am – 5:00 pm

District Architecture Center

421 7th St NW, Washington, DC 20004

Next year the Social Security Disability Insurance (SSDI) trust fund will deplete its reserves, prompting a discussion in Washington about the future of the program. The McCrery-Pomeroy SSDI Solutions Initiative seeks to provide policymakers with a menu of innovative ideas to improve the SSDI program and other services for people with disabilities.

The SSDI Solutions Conference will feature presentations of numerous policy proposals selected by the McCrery-Pomeroy SSDI Solutions Initiative and will bring together experts, advocates, policymakers and interested stakeholders for an engaged dialogue about how SSDI and other programs can better serve those with disabilities, taxpayers and society as a whole.

Follow the Conference on Twitter using the hashtag #SSDISolutions

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Venue Wifi Password: Architects_2014

About the SSDI Solutions Initiative

The McCrery-Pomeroy SSDI Solutions Initiative is a project dedicated to identifying practical policy changes to improve the Social Security Disability Insurance (SSDI) program and other services for people with disabilities. The SSDI Solutions Initiative issued a call for papers to solicit ideas in a number of areas related to the program, culminating in this conference where authors will present their papers to discussants and attendees. The SSDI Solutions Conference will be followed by a publication that compiles the proposals and synthesizes the findings. With the SSDI trust fund only one year from depleting its reserves, these solutions can help spur a debate on how to ensure the SSDI program best serves those with disabilities, those who pay into the program, and the economy as a whole.

What is SSDI?

SSDI – or Social Security Disability Insurance – is a component of the government-run Social Security program. It provides monthly cash benefits to workers who have one or several medical conditions, which are expected to keep them from earning above a certain threshold for at least a year. The SSDI program has provided important support to millions of workers with disabilities and their families, helping many individuals who are unable to work stay out of poverty.

What is the Purpose of the SSDI Solutions Initiative?

Once the Trust Fund Reserves are depleted, the SSDI program will have insufficient revenues to fully fund these benefits beyond 2016. In addition, there are areas where SSDI and other programs could be improved to better serve workers with disabilities and others who are insured by the program. A number of experts, reviewers, and political leaders have found that improvements should be made to the determination process, program integrity, interactions between SSDI and other federal and state programs, return to work incentives, and early interventions with workers with disabilities, to name just a few areas.

Why Do We Need to Make Improvements to SSDI Now?

In just over a year, the Social Security Disability trust fund is scheduled to run out of reserves, at which point current law calls for benefits to be cut across-the-board by roughly 20 percent. At least in the short-term, avoiding this cut is likely to require either new revenue or some amount of temporary borrowing or reallocation from the Social Security Old-Age and Survivors' Insurance (OASI) trust fund to the Disability Insurance trust fund. However, simply reallocating existing payroll taxes from OASI without doing anything to improve the SSDI program or strengthen the overall state of Social Security would actually weaken the financial state of the OASI program – and for that reason is likely to be controversial.

Instead of viewing the avoidance of trust fund exhaustion as a political liability, we believe policymakers should regard it as a policy opportunity. If provided with thoughtful and practical ideas to improve the SSDI program, policymakers could complement any measures to prevent

the depletion of Trust Fund reserves with policies that begin to reform the SSDI program for the better. This means identifying proposals well in advance of the deadline, rather than waiting for Congress to cobble together a last-minute, poorly conceived solution.

Ideally, the projected 2016 date for the trust fund depletion would be used as an opportunity for Congress to enact comprehensive Social Security reform that addresses the shortfalls in both the SSDI and OASI program in order to consider all of the tradeoffs and interactions within the Social Security program. But whether the depletion of the disability insurance trust fund reserves is addressed as part of comprehensive reform or on its own, there will be a need for constructive ideas to improve the program.

How Has the SSDI Solutions Initiative Identified Possible Solutions?

Rather than a top-down approach where we propose our own ideas, the SSDI Solutions Initiative solicited ideas from experts who have been studying this program for years, and even decades. Specifically, the SSDI Solutions Initiative issued a public “call for papers,” allowing potential authors from different disciplines and ideological backgrounds to submit proposals. The project then selected the most promising ideas to be written into full papers; focusing on proposals encompassing a wide variety of areas within the program and placing a special premium on proposals that include "intermediate steps" that could be enacted within the next few years. The papers have gone through a peer-review process, will be presented at a conference, and ultimately will be published and made available to the public.

Who is Leading the SSDI Solutions Initiative?

The SSDI Solutions Initiative is co-chaired by former Congressmen and Ways and Means Social Security Subcommittee Chairmen Earl Pomeroy (D-ND) and Jim McCrery (R-LA). They have been assisted by a staff of analysts and an Advisory Council of experts, advocates, and practitioners from across the ideological spectrum. The SSDI Solutions Initiative is a project of the nonpartisan Committee for a Responsible Federal Budget.

Section 508 Compliance

The SSDI Solutions Initiative is committed to complying with Section 508 standards. Section 508 of the Rehabilitation Act (29 U.S.C. 794d), as amended in 1998, is a federal law that requires agencies to provide individuals with disabilities equal access to electronic information and data comparable to those who do not have disabilities, unless an undue burden would be imposed on the agency. The Section 508 standards are the technical requirements and criteria that are used to measure conformance within this law. More information on Section 508 and the technical standards can be found at www.section508.gov.

Co-Chair Jim McCrery



Former Congressman Jim McCrery served as a member of the U.S. House of Representatives for nearly 21 years representing Louisiana. He was a member of the Ways and Means Committee from 1993 through 2008, serving as a ranking member from 2007-2008. Previously, he was Chairman of the Social Security and the Select Revenue Measures Subcommittees.

As ranking member of the Ways and Means Committee, Congressman McCrery worked closely with Chairman Rangel and other Democratic members to craft bipartisan approaches on health care and trade matters. As a member of the Health Subcommittee for 14

years, Mr. McCrery helped draft and pass a number of major health care bills, including the Balanced Budget Act of 1997 and the Medicare Prescription Drug, Improvement, and Modernization Act of 2003.

While Congressman McCrery is widely acknowledged as being well-versed on policy issues, he also understands the political side of Washington, having served for ten years on the executive committee of the National Republican Congressional Committee (NRCC).

Former Congressman Jim McCrery is currently a partner with Capitol Counsel LLC, where he counsels clients on tax, trade, and health care issues.

Co-Chair Earl Pomeroy

Former Congressman Earl Pomeroy represented his home state of North Dakota for 18 years as the state's lone member of the U.S. House of Representatives and eight years as Insurance Commissioner.

As a Congressman, Mr. Pomeroy served on the Ways and Means and Agriculture Committees, including as Chairman of the Social Security Subcommittee. In keeping with his insurance regulatory experience, he was a leader in health, pension and group insurance issues. In Congress, Mr. Pomeroy had a reputation for centrist practical approaches to public policy issues and a willingness to work in a bipartisan fashion.



As Insurance Commissioner, Mr. Pomeroy served as President of the National Association of Insurance Commissioners, where he advanced a program of minimum standards for financial regulation by state insurance departments, which is still operative today. As Commissioner, he chaired a number of health insurance committees, including small group market reform and standardization of Medicare supplement policies.

Mr. Pomeroy is currently an attorney at Alston & Bird law firm, where he is a member of the health policy group.

Panel One: Early Intervention and Work Support

9:15 AM – 10:30 AM

Discussant: Lisa Ekman; President, Ekman Advocates for Progress, LLC

Presenting Authors:

David Stapleton; Senior Fellow, Mathematica Policy Research

“The Employment/Eligibility Service System: A New Gateway for Employment Support and Social Security Disability Benefits”

Additional Authors: Yonatan Ben-Shalom and David Mann

Summary: The authors propose to pilot and gradually implement a revised disability determination system that combines timely employment supports for workers and a redesigned SSDI eligibility determination process. The goal of the program is to reduce exit from the labor force and entry into SSDI, improve the disability determination process, and improve economic outcomes for workers. Such a system would be based on existing models from private disability insurance providers, worker's compensation, and international examples.

Jennifer Christian; President, Webility Corporation

“A Community-Focused Health and Work-Service”

Additional Authors: Thomas Wickizer and Kim Burton

Summary: The authors propose a new program called the Health and Work-Service (HWS). The HWS will provide near-immediate assistance to those needing extra help with the simultaneous challenge of new or worsened impairment due to a health problem (whether temporary or long-lasting), a job in peril, and today's complex healthcare and benefits systems. Time is of the essence. The longer someone is away from work, the less likely they will ever return – and jobs are lost very fast. At present, most working people have little or no access to expert help when they are facing these predicaments.

The HWS will bring resources and expertise to the health-and-work interface on a just-in-time basis. HWS will take referrals from physicians, individuals, employers, insurers, or public agencies. HWS will deliver a finite set of simple, low cost, and time-limited services, working directly with affected individuals and actively coordinating with other stakeholders to identify and quickly address remediable obstacles to recovery and work in any life domain. HWS will refer complex conditions and issues to other community resources. HWS will focus on driving situations forward towards functional restoration and prompt, sustainable return to work. HWS will be delivered mostly by telephone and on-line to make it available to anyone anywhere.

The paper describes the conceptual underpinnings, overall design, and essential features of HWS, and lays out a series of steps to get from here to there. It also reviews major lessons learned and results produced so far by two trailblazer initiatives that contributed features to this proposal: the COHE program in Washington State and the Fit for Work Service now being rolled out across the United Kingdom.

In sum, HWS is designed to (a) help individuals heal, adapt to change, and keep their jobs; (b) help employers retain valued employees and control benefit costs; and (c) reduce withdrawal from the workforce and entry onto taxpayer-funded programs.

Julie Kerksick; Policy Analyst, Community Advocates Public Policy Institute

“Using Transitional Jobs to Increase Employment of SSDI Applicants and Beneficiaries”

Additional Authors: David Riemer and Conor Williams

Summary: The authors propose providing access to subsidized jobs, and an expanded earnings supplement, to individuals whose ability to work has been affected by a medical condition. They describe how the subsidized jobs, called Transitional Jobs, would be designed and administered, and propose a pre-pilot to test the viability of implementing this approach. The pre-pilot, if successful, would be followed by a demonstration project in which a statistically valid number of SSDI beneficiaries, applicants, and potential applicants would be randomly assigned to a control group and an experimental group to determine the effect on SSDI enrollment and costs, employment and earnings, income and poverty, and other measurable impacts.

The authors also include access to Work Incentive Counselors, to help individuals currently receiving SSDI obtain accurate information about how part-time and full-time work affect their benefits and current medical coverage. This is to ensure that all the current earnings offsets and other incentives that are in place are used in helping individuals receiving SSDI to manage a transition back into the workforce.

Panel Two: Structural Reforms

10:45 AM – 12:00 PM

Discussant: Art Spencer, Former Associate Commissioner for Disability Programs, Social Security Administration

Presenting Authors:

Kim Hildred; President, Hildred Consulting, LLC

“Transitional Benefits for a Subset of the Social Security Disability Insurance Population”

Additional Authors: Jennifer Christian, Harold Krent, and Pam Mazerski

Summary: The authors propose to investigate creating a transitional disability benefit for a small subset of SSDI beneficiaries who (1) have medical conditions that are likely to improve; or (2) whose functional impairments could be significantly reduced, either over time or with medical or rehabilitative treatment. The authors would explore evidence-based practices for both categories of beneficiaries such as health and self-management techniques aimed at improving function and employment supports to help these individuals improve their health and well-being, increase their level of participation in life, and reattach to the labor market when possible.

Jason Fichtner; Senior Research Fellow, Mercatus Center

“Beyond All or Nothing: Reforming Social Security Disability Insurance to Encourage Work and Wealth”

Additional Author: Jason Seligman

Summary: The authors propose to create a time-limited and partial disability benefit option in order to better reflect the nature of disability as a continuum rather than an all-or-nothing state. A disability insurance system that offers both partial and time-limited benefits would better motivate productive employment of remaining ability and, when possible, rehabilitation of lost ability following any partial or temporary disability determination. Their proposal will also explore an increased role for private employers in providing disability insurance. They expect this reform option to increase opportunities for rehabilitation and work, and they propose demonstration projects to test this assumption. They propose to provide grants to fund demonstration/pilot projects to provide empirical evidence needed for full implementation.

The opinions and views expressed are those of the authors and do not represent any view, position, policy or finding of the U.S. Government or the Department of Treasury.

Neil Jacobson; CEO, Abilicorp

“Exploring Alternative Definitions of Disability”

Additional Authors: Anita Shafer Aaron, Aya Aghabi, and Barbara Butz

Summary: The authors propose to redefine disability for purposes of the SSDI and SSI programs, potentially leading to a change in the fundamental principles of the program and, in turn, a new focus on early intervention. The authors argue that this would result in a significant increase in employment and self-sufficiency for people with disabilities. The new definition will contain no reference to “inability to work” and is expected to change SSDI from an income replacement program to a program that protects people from the high cost of disability and helps people work, stay at work, or return to work. The revised program will rely on inter-agency coordination and funding will flow from multiple departments.

Panel Three: Determination and Adjudication Reform

1:00 PM – 2:15 PM

Discussant: Margaret Malone; Former Staff Director, Social Security Advisory Board

Presenting Authors:

Jon Dubin; Associate Dean for Clinical Education and Professor of Law; Rutgers School of Law Newark

“Eliminating Reconsideration in SSDI’s Adjudication Process after 15 Years of Testing, and Enhancing Initial Case Development”

Summary: The author proposes several measures to improve the disability determination process. This includes eliminating the first level of appeal (reconsideration), enhancing case development at the initial claim level, and developing a “ticket to learn” work incentive education and skills enhancement program to promote longer-term job readiness and work attachment in a wider array of less medically demanding work.

Dale Glendening; Administrative Law Judge, Social Security Administration

“Social Security: Restructuring Disability Adjudication”

Additional Authors: David Engel and Jeffrey Wolfe

Summary: Recognizing persistent ongoing backlogs and rising costs in the Social Security disability hearings and appeals process, the authors propose comprehensive procedural and jurisprudential reforms. As more than 80% of all disability claimants are now represented, fundamental reforms include adoption of an adversarial jurisprudence / process with inclusion of government counsel (able to resolve disability appeals by agreement early in the appeals process), accompanied by adoption of a body of comprehensive procedural rules. The authors further propose reduction of the scope of Appeals Council review, streamlining the adjudicatory process; and fundamentally restructuring payments to representatives, including elimination of representative travel reimbursement; and reorganization of representative fees, so that fees are no longer calculated on “past due benefits,” foreclosing fee-based incentives for delay.

The opinions and views expressed are those of the authors and do not represent any view, position, policy or finding of the U.S. Government or the Social Security Administration or any of its components.

Alex Constantin; Statistician, Data Scientist, and Researcher, National Institutes of Health

“Data-Driven Solutions for Improving the Continuing Disability Review Process”

Additional Authors: John Collins, Julia Porcino, and Chunxiao Zhou

Summary: The authors propose to analyze the processes SSA uses to designate medical improvement diaries and to prioritize medical Continuing Disability Reviews (CDRs). The authors will use the analyses to develop ways to improve those processes, aiming to alleviate case backlogs and better select cases for full medical reviews. The authors will develop methods for extracting medical information from beneficiaries’ electronic folders, to develop an automated method for designating the likelihood of future medical improvement, and to improve the current CDR predictive model. These actions would help SSA more accurately designate medical improvement, improve the diary set for review, better target CDRs toward those most likely to have recovered, and thus make the best use of limited CDR dollars.

Panel Four: Interaction with Other Programs

2:30 PM – 3:45 PM

Discussant: David Wittenburg; Director of Health Research, Mathematica Policy Research

Presenting Authors:

Mark Meyer; Vice President and Co-Leader of Insurance Economics Practice, Charles River Associates

“Expanding Private Disability Insurance Coverage to Help the SSDI Program”

Additional Author: David Babbel

Summary: The authors propose to reduce the number of people needing SSDI benefits through better interaction with existing private disability insurance programs and offer three recommendations. First, they propose to expand private disability insurance coverage to more employees by encouraging employer use of “automatic enrollment arrangements” for group disability insurance plans. By expanding private disability insurance coverage, the authors believe that more workers will benefit from the early disability management and return to work supports provided by private plans, and will be less likely to apply for SSDI, thus reducing program costs. Second, the authors recommend undertaking a Federal education and outreach program to encourage workers and employers to face key disability income security issues and workforce productivity issues. Third, they suggest exploring private sector techniques and strategies to improve SSDI work outcomes.

Mark Perriello; Independent Consultant

“Ensuring Access to Long-Term Services and Supports for People with Disabilities and Chronic Conditions”

Summary: The author proposes policy changes to create a comprehensive system in the United States to ensure workers with disabilities have affordable access to adequate health insurance coverage and long-term services and supports (LTSS). First, the author proposes establishment of a new program to wrap around coverage to commercial health insurance to provide LTSS to working people with disabilities. The program would supplement the worker's health insurance; fill gaps in current health insurance coverage (e.g., adequate durable medical equipment coverage) and provide LTSS (such as personal attendant care) not covered by health insurance; and prevent individuals from having to apply for Medicaid, which is the only program that now provides them with such services and supports. Secondly, the author proposes to expand the Medicaid Buy-In program (currently active in 45 states) by making the program national, standardizing the earnings and asset limits, and making other changes to improve the level and consistency of the

covered services and supports. This would prevent working individuals from having to meet the current strict income/asset standards to qualify for Medicaid and thus obtain the covered services and supports. Finally, the author proposes to improve current tax provisions available to workers with disabilities to assist in covering the costs of needed supports and services not covered, or not fully covered, by the above two programs that are financed out of pocket.

John Burton; Professor Emeritus, Rutgers University and Cornell University

“Improving the Interaction Between the SSDI and Workers’ Compensation Programs”

Additional Author: Steve Guo

Summary: The authors propose to address a number of the interactions between SSDI and Workers' Compensation (WC) and investigate several policy options that could reduce SSDI expenditures in the process. Particularly, the authors will consider changes to Federal standards requiring States to compensate work-related injuries/disease; the enactment of new federal rules requiring WC settlements to set aside funds to cover future WC cash benefits; the implementation of experience-rating employers so those with more employees filing for SSDI pay higher FICA taxes, thus providing incentives for employers to reduce injuries and diseases and to rehabilitate disabled workers; and changes to the law that currently allow some states to reduce WC payments once an individual begins to receive SSDI payments (a “reverse-offset”), as opposed to the other way around.

Biographies

Speaker and Panelist Biographies

Senator Orrin G. Hatch (R-UT)

Chairman, Senate Finance Committee

Twitter: @SenOrrinHatch | @GOPSenFinance

Now in his seventh term as Utah's senator, Orrin Hatch is the most senior Republican in the Senate. Among his many initiatives are the Balanced Budget Amendment to the Constitution, the Strengthening Our Commitment to Legal Immigration and America's Security Act, the Religious Freedom Restoration Act, the Americans with Disabilities Act, the Antiterrorism and Effective Death Penalty Act, and the Utah School Trust Lands Exchange Act.

Senator Hatch is the Chairman of the Senate Committee on Finance. He is also a member (and former Chairman) of the Judiciary Committee; a member (and former Chairman) of the Senate Health, Education, Labor, and Pensions Committee; and a member of the Joint Committee on Taxation. He also has the honor of serving on the Board of Directors for the Holocaust Memorial Museum in Washington, D.C.

Bob Greenstein

President, Center on Budget and Policy Priorities

Twitter: @GreensteinCBPP | @CenteronBudget

Greenstein is the founder and President of the Center on Budget and Policy Priorities. He is considered an expert on the federal budget and a range of domestic policy issues, from anti-poverty programs and various aspects of tax policy to health reform and Social Security. He has written numerous reports, analyses, book chapters, op-ed pieces, and magazine articles on these issues.

Prior to founding the Center, Greenstein was Administrator of the Food and Nutrition Service at the U.S. Department of Agriculture under President Carter, where he directed the agency that operates the federal food assistance programs, such as the food stamp and school lunch programs, and helped design the landmark Food Stamp Act of 1977, generally regarded as the Carter Administration's principal anti-poverty achievement. He was appointed by President Clinton in 1994 to serve on the Bipartisan Commission on Entitlement and Tax Reform and headed the federal budget policy component of the transition team for President Obama. He is a graduate of Harvard College and has received honorary doctorates from Tufts University and Occidental College.

Alan Cohen

Senior Fellow, Center for American Progress | Member, Social Security Advisory Board

Alan Cohen is a Senior Fellow at the Center for American Progress, working primarily on Social Security issues. Cohen was recently confirmed by the Senate to be a member of the Social Security Advisory Board. Cohen served as the chief counselor for Social Security and the senior budget advisor for the U.S. Senate Committee on Finance from 2001 to 2012. He served as senior advisor for budget and economics to the secretary of the treasury from 1993 to 2001. He received the Treasury Medal in January of 2001. For six months in 1999 and 2000, he was detailed from the U.S. Treasury Department to the Domestic Policy Office in the Office of the Vice President to serve as the budget advisor. He served as the budget economist for the U.S. Senate Committee on Finance from 1992 to 1993. From 1983 to 1992, Cohen was first a senior economist and then the assistant staff director for budget priorities for the U.S. Senate Budget Committee. During this period, he worked extensively on the Social Security program. Cohen worked as a policy analyst and economist at the Office of the Assistant Secretary for Planning and Evaluation at the U.S. Department of Health and Human Services from 1979 to 1983. During this time, he helped start the Low Income Home Energy Assistance Program, or LIHEAP. Cohen received a B.A. in physics from Grinnell College in 1972, a master's of public policy from the University of Michigan in 1975, and a Ph.D. in economics from the University of Wisconsin in 1979. Cohen is the co-author—with Kevin Hollenbeck—of “Energy Assistance Schemes: Review, Evaluation, and Recommendations” in *High Energy Costs: Assessing the Burden*, published by Resources for the Future in 1982.

Mark Warshawsky

Visiting Scholar, Mercatus Center | Former Member, Social Security Advisory Board

Mark J. Warshawsky is a visiting scholar at the Mercatus Center of George Mason University. His research interests include employer-sponsored retirement programs, Social Security, financial planning, health and long-term care financing, corporate and public finance, and macroeconomics. He has testified before Congress, and he writes a monthly economic analysis column for Tax Notes. Warshawsky is president of ReLIAS LLC, a design firm for customized retirement income strategies. He is a co-author of the *Fundamentals of Private Pensions, Ninth Edition* (Oxford University Press, 2010) and author of *Retirement Income: Risks and Strategies* (MIT Press, 2012). From 2006 to 2013 he was director of retirement research at Towers Watson, a global human capital consulting firm. He was a member of the Social Security Advisory Board from 2006 through 2012 and was vice chairman of the federal Commission on Long-Term Care in 2013. From 2004 to 2006, Warshawsky served as assistant secretary for economic policy at the US Department of the Treasury, playing a key role in the development of the Pension Protection Act of 2006. He is the inventor of the life care annuity, a product integrating the immediate life annuity and long-term care insurance benefits. He has held senior-level positions at the Federal Reserve Board, the IRS, and TIAA-CREF. Warshawsky received a PhD in economics from Harvard University and a BA with highest distinction from Northwestern University.

Discussant Biographies

Lisa Ekman

President, Ekman Advocates for Progress, LLC

Lisa Ekman is President of Ekman Advocates for Progress, LLC, a disability policy consulting firm. Lisa has more than 14 years of experience working to improve economic security for people with disabilities, focusing on SSDI and Supplemental Security Income (SSI), Medicare and Medicaid, employment programs, and long-term services and supports. Lisa has an extensive background in SSDI/SSI program policy, with a focus on assisting beneficiaries to return to work, working for the Social Security Administration on implementation of the Ticket to Work and Work Incentives Improvement Act, as a staff member to the Ticket to Work and Work Incentives Advisory Panel, and as disability policy advisor to Senators Edward M. Kennedy, Tom Harkin, and James Jeffords. Lisa also has significant experience regarding the intersection of health and economic security for people with disabilities. She currently serves as a consultant on Social Security policy to the Consortium for Citizens with Disabilities Social Security Task Force and as a consultant on government affairs to the National Organization of Social Security Claimants' Representatives (NOSSCR). Previous clients include the American Association of People with Disabilities (AAPD), the National Academy of Social Insurance, and Axiom Resource Management as a specialist on the Ticket to Work Program. Ms. Ekman is also currently Director of Federal Policy for Health & Disability Advocates. In that capacity, she represents the organization to congress, the administration, and advocacy coalitions in matters of importance to people with disabilities pertaining to health care, long-term services and supports, employment, and Social Security. Ms. Ekman started her disability policy career as a Presidential Management Intern at the Social Security Administration, where she worked on the development and implementation of the Ticket to Work Program. After her time on the Hill, she served as a Senior Policy Analyst in Legislative Affairs for the Association of University Centers on Disabilities before returning to school to earn her law degree. Ms. Ekman received her J.D., cum laude, from Georgetown University, her Masters in Social Work from the University of Denver, and a Bachelors in Communications from Northwestern University.

Margaret Malone

Former Staff Director, Social Security Advisory Board

Margaret Malone began her years of service as a specialist in Social Security Act programs at the Congressional Research Service, serving subsequently as a specialist at the U. S. Senate Committee on Finance, as Staff Director of the Social Security Advisory Board, and as a Special Assistant on Disability to the Commissioner of Social Security. She is currently an independent consultant on disability issues.

Art Spencer

Former Associate Commissioner for Disability Programs, Social Security Administration

In 1973, Art began his career with the Virginia Disability Determination Services (DDS), the State Agency adjudicating Social Security disability claims for Virginia. He received a series of promotions, including line and QA supervisor; led all statewide training; and for seven years was the Regional Director in Roanoke, Virginia, leading DDS operations for the southwest quadrant of the State. In 1993 he was selected to be the Director of the Delaware DDS; in 1994 was a Disability Program Administrator in the Philadelphia Region and in 1995 became the Director of the New Jersey DDS, where he served for seven years. In 2002 Art moved to SSA in the Office of Disability Programs, focusing on the development and interpretation of disability policy, primarily non-medical and evaluation policies and procedures. He led the development of the Request for Program Consultation (RPC) process, a new way to resolve questions and disagreements on complex disability issues nationwide. In July 2008, Art was selected for SSA's Senior Executive Service (SES) development program. His first assignment was within the Office of Disability Systems, coordinating the development tasks for the Disability Claims Processing system, and his second assignment took him to the San Francisco region where he led operations for six Teleservice Centers. Between June 2010 and January, 2014, Art was the Associate Commissioner for the Office of Disability Policy responsible for the nation's Social Security disability policy. Art has a BS degree from Virginia Commonwealth University and an MPA from Virginia Tech and is a member of the National Academy of Social Insurance. Now retired, Art makes stained glass windows, plays with grandchildren (and dogs), plays the guitar and continues to be involved in Disability program issues.

David Wittenburg

Director of Health Research, Mathematica Policy Research

David Wittenburg is an expert in interventions to promote employment for people with disabilities. He has over 18 years of experience in working on evaluation design and program evaluations for several federal agencies, including the Social Security Administration, Department of Labor, and Department of Education. He recently worked in senior leadership roles on three SSA demonstration projects, in which he has helped design and implement experimental and non-experimental approaches to assess the efficacy of return to work interventions for people with disabilities. He has presented his findings to diverse research and policy audiences, including in a Congressional testimony, conference presentations, reports, and several journal publications. He has also recently edited two special journal volumes on employment topics related to people with disabilities for the IZA Journal of Labor Policy and the Journal of Disability Policy Studies. He is a member of the National Academy of Social Insurance and was formerly a senior associate at the Urban Institute and the Lewin Group. He has a Ph.D. in economics from Syracuse University.

Author Biographies

Anita Aaron

Anita Aaron is the Executive Director of the World Institute on Disability. Prior to joining WID in 2010, Anita served for twenty years as CEO of the Lighthouse for the Blind and Visually Impaired headquartered in San Francisco focusing on local, regional and national policy and program concerns impacting individuals who are blind, visually impaired, or deaf-blind. Anita began her leadership in disability rights in 1981 as Deputy Director of the Berkeley Center for Independent Living. Her work in the blindness field resulted in numerous local and national acknowledgments for her individual efforts; however, she believes her most significant contribution to the disability movement overall is a commitment to building bridges between disability organizations, disability groups, and among individuals with disabilities.

Aya Aghabi

Aya Aghabi graduated from UC Berkeley in 2013 with a BA in Development Studies. Aya is interested in work relating to social and community development. During her time at Berkeley, Aya interned with several different organizations. In 2012, Aya interned with the World Bank's Middle East and North Africa office in their Sustainable Development department, researching and reporting urban development issues in Libya after the Arab Spring. In 2013, she interned with Save the Children in Amman, Jordan, assisting in enrolling Syrian refugees in the "Education For All" program. In addition, she interned with Happold Consulting providing research and analysis regarding poverty in Riyadh, Saudi Arabia, to aid in their design and implementation of the "Future Riyadh" project. In January 2014, Aya worked with the International Rescue Committee in their refugees' Job Development department.

David Babbel

Dr. David F. Babbel is senior advisor to Charles River Associates ("CRA"). He is also Professor Emeritus at The Wharton School of the University of Pennsylvania, having previously served on the finance, insurance, and international finance faculty at the Haas School of the University of California at Berkeley. With more than 100 articles and publications to his credit, along with a number of books and monographs, Dr. Babbel is an expert in the fields of finance, investments, risk management, insurance, pensions, and international business. During his more than 25-year career as an educator, Dr. Babbel has taught courses in finance, investments, fixed income, insurance, and risk management at the undergraduate, graduate, doctoral, and executive level. Prior to joining CRA, he was a senior financial economist in the Financial Sector Development Department of the World Bank and a vice president in the Pension and Insurance Department and senior advisor to Goldman Sachs. He holds a PhD in Finance and an MBA in Finance and International Finance from the University of Florida, and received a BA in Economics from Brigham Young University and George Mason University.

Yonatan Ben-Shalom

Yonatan Ben-Shalom is a senior researcher at Mathematica's Center for Studying Disability Policy, with expertise in policies and programs related to the employment and income of people with disabilities—especially those who acquire disability in adulthood such as workers and veterans. He directs the Stay-at-Work/Return-to-Work Policy Collaborative, a project funded by the Office of Disability Employment Policy at the U.S. Department of Labor. The Collaborative focuses on advancing policies and programs that promote positive SAW/RTW outcomes for workers who experience a chronic illness, disability, or medical condition that increases their risk for labor force exit. Dr. Ben-Shalom has served as principal investigator for numerous studies funded by the Social Security Administration and the National Institute on Disability, Independent Living, and Rehabilitation Research. He has a Ph.D. in Economics from the Johns Hopkins University.

John Burton

John F. Burton, Jr. is Professor Emeritus in the School of Management and Labor Relations (SMLR) at Rutgers University and Professor Emeritus in the School of Industrial and Labor Relations at Cornell University. He is a Member of the Study Panel on National Data on Workers' Compensation of the National Academy of Social Insurance (NASI). Burton previously served as Dean of SMLR and as a faculty member at Cornell University and the University of Chicago. He has a law degree and a Ph.D. in Economics from the University of Michigan. John Burton has conducted research, served as a consultant, and assisted with the formulation of public policy for many years. He was the Chairman of the National Commission on State Workmen's Compensation Laws, which submitted its report to the President and Congress in 1972. He has served as a consultant to a number of jurisdictions, including Florida, Michigan, Washington, Oregon, New York, Massachusetts, and Ontario. His book with Monroe Berkowitz, *Permanent Disability Benefits in Workers' Compensation*, received the Kulp Award from the American Risk and Insurance Association. Burton was President of the Industrial Relations Research Association (now the Labor and Employment Relations Association) in 2002. He also was the editor of *John Burton's Workers' Compensation Monitor* from 1988 to 1997 and the *Workers' Compensation Policy Review* from 2001 to 2008.

Kim Burton

Kim is a freelance occupational health researcher and ergonomics consultant. He is an Honorary Fellow of the Faculty of Occupational Medicine, with a professorial appointment at the University of Huddersfield, UK. In 2011 he was appointed Officer of the Order of the British Empire (OBE) for services to occupational healthcare. Kim's clinical qualification was in osteopathy, which eventually led to a sideways shift to a career in research after studying for a PhD in biomechanics, ergonomics, and epidemiology related to back pain at Huddersfield Polytechnic, which he earned in 1987. Kim's research interests include the biomechanics, ergonomics, and psychosocial aspects

of occupational musculoskeletal problems, as well as their clinical management. His current work focuses on exploring the nature of obstacles to recovery and obstacles to return to work for people with common health problems. This has led to a series of research projects, funded by UK Government and industry, which work towards shifting the culture around work and health through novel educational and rehabilitation interventions.

Barbara Butz

Barbara Butz is the President and CEO of PolicyWorks and also serves as a Managing Partner of ForwardWorks Consulting, LLC. She has over 40 years of experience in employment training and workforce development on the federal, state and local levels. For four years served as Senior Consultant to MAXIMUS, the Social Security Administration's Operations Support Manager for the Ticket to Work Program, where she served as the National Workforce Team Lead. In this role she had responsibility for training and supporting workforce systems across the country to meet their responsibilities as Employment Networks (job placement agencies) serving people with disabilities receiving SSDI and/or SSI. Barbara also served as the Assistant Secretary for Labor and Employment Security in Florida for four years; Executive Director of a non-profit employment and training organization; Director of Employment Programs for an urban Community Action Program; and Program Supervisor for Vocational Technical and Adult Education programs for a public school district.

Jennifer Christian

Jennifer Christian, MD, MPH, FACOEM is board-certified in occupational medicine and earned both her medical and public health degrees from the University of Washington in Seattle. She is President of Webility Corporation, a management consulting and training company whose clients are employers, healthcare delivery organizations, insurers, intermediaries, and government agencies. Dr. Christian chairs the Work Fitness & Disability Section of the American College of Occupational & Environmental Medicine. She received ACOEM's Health Achievement Award for bringing the concept of preventing needless work disability to the fore, and is a Fellow of the College. She led the development of several ACOEM reports, including the "Personal Physician's Role in Helping Patients with Medical Conditions to Stay at Work and Return to Work", and "Preventing Needless Work Disability by Helping People Stay Employed." Starting in 2006 she won several awards for founding and then leading the non-profit 60 Summits Project in an effort to propagate the work disability prevention model across the 60 jurisdictions of North America. That initiative featured ACOEM's Preventing Needless Work Disability by Helping People Stay Employed document as the centerpiece of dialogue. She created groups of professional volunteers in 14 jurisdictions who in turn planned and produced 20 multi-stakeholder conferences. The project has since been mothballed due to lack of funds.

John Collins

Dr. Collins, an Assistant Research Professor, teaches Research Design and Statistics in the Department of Rehabilitation Medicine. His research interests include theory of measurement; application of statistical models to the estimation of properties of instruments used in Rehabilitation and to diagnostic tests more broadly; nonparametric modeling and development; and dissemination of statistical best practices in applications.

Alex Constantin

Dr. Constantin is a statistician and computer scientist in Epidemiology and Biostatistics at the NIH Clinical Center. Her research focuses on applying and developing multivariate pattern recognition methods for the analysis of complex biomedical data. She received a PhD in Computer Science with a major in statistical learning and a designated emphasis in communication, computation, and statistics from UC Berkeley. Her dissertation work was performed in the Surbeck Laboratory for Advanced Imaging at UCSF, where she developed statistical models to assist in the clinical management and understanding of brain tumors. She also holds a Masters degree in computer science from UC Berkeley and a Bachelors degree in computer science and mathematics/statistics from Williams College.

Jon Dubin

Professor Dubin received his A.B. from Dartmouth College and his J.D. from N.Y.U. He has served as law clerk to U.S. District Judge John L. Kane Jr.; assistant counsel for the NAACP Legal Defense and Educational Fund, Inc.; director of litigation for the Harlem Neighborhood Office of the Legal Aid Society, Civil Division; and the Marvin M. Karpatkin Fellow on the American Civil Liberties Union's national staff. Immediately prior to joining the Rutgers–Newark law faculty in 1999, he was a professor of law and director of clinical programs at St. Mary's Law School, where he received the faculty award for teaching excellence. Professor Dubin received the 2003 Haywood Burns/Shanara Gilbert Award from the Northeast Regional People of Color Legal Scholarship Conference for scholarship that advances the position of people of color; the 2007 Stanley Van Ness Leadership Award in Public Interest Law from the New Jersey Public Interest Center/New Jersey Appleseed for career contributions in public interest law; the 2010 Oliver Randolph Award from the Garden State Bar Association for contributions to civil rights; the 2014 Eileen P. Sweeney Award from the National Organization of Social Security Claimant's Representatives for outstanding service to improve the quality and availability of advocacy for social security claimants and to improve the social security adjudicative process; and the 2014 Clinical Legal Education Association's Award for outstanding contributions on behalf of clinical law teachers. He has been chair of the AALS Poverty Law Section and a board member of the Clinical Law Review, Clinical Legal Education Association, National Center on Law and Economic Justice, and the New Jersey Institute for Social Justice.

David Engel

David W. Engel is the Hearing Office Chief Administrative Law Judge with the Social Security Administration, Office of Disability Adjudication and Review in Tulsa, Oklahoma.

Jason Fichtner

Jason J. Fichtner is a senior research fellow at the Mercatus Center at George Mason University. His research focuses on Social Security, federal tax policy, federal budget policy, retirement security, and policy proposals to increase saving and investment. Previously, he served in several positions at the Social Security Administration, including as deputy commissioner of social security (acting), chief economist, and associate commissioner for retirement policy. He also served as senior economist with the Joint Economic Committee of the US Congress. His work has been featured in the Washington Post, the Wall Street Journal, the New York Times, Investor's Business Daily, the Los Angeles Times, the Atlantic, and USA Today, as well as on broadcasts by PBS, NBC, and NPR. He also serves as an adjunct professor at the Georgetown McCourt School of Public Policy, the Johns Hopkins School of Advanced International Studies, and the Virginia Tech Center for Public Administration and Policy, where he teaches courses in economics, public finance, public policy process, public management, and public budgeting processes. Fichtner earned his BA from the University of Michigan, Ann Arbor; his MPP from Georgetown University; and his PhD in public administration and policy from Virginia Tech.

Dale Glendening

Dale D. Glendening is an administrative law judge with the Social Security Administration, Office of Disability Adjudication and Review in Atlanta, Georgia and a member of the Florida and North Carolina Bar Associations.

Xuguang (Steve) Guo

Steve Guo is an Assistant Professor of Management at Cal Poly Pomona. Steve Guo received his doctorate from the School of Management and Labor Relations at Rutgers University. Before joining Cal Poly Pomona he worked as an assistant professor at the University of Wisconsin-Whitewater and taught human resource management, compensation, and benefits for undergraduate and MBA students. His research focuses on compensation, employee benefits, and entrepreneurship. He has been published in Cornell University's Industrial and Labor Relations Review and other journals.

Kim Hildred

Kim Hildred currently serves as President of Hildred Consulting, LLC, which she founded after spending the last 17 years of her career as Staff Director of the U.S. House of Representatives, Committee on Ways and Means, Subcommittee on Social Security. There she led efforts to assist

Representatives in the development and passage of legislation to strengthen Social Security retirement, survivors, and disability programs as well as in the oversight of these programs. Prior to her work in the House, Kim held various Social Security disability program management positions in the Social Security Administration, where her responsibilities included deciding disability claims for the States of Kansas and Wisconsin, serving as a federal hearing officer, providing comprehensive staff support managing and overseeing regional state disability operations, and serving as the federal official responsible for ensuring that assigned state disability operations met compliance and performance expectations. Kim received her Bachelor's degree from Waynesburg College and her Master's degree from Duquesne University.

Neil Jacobson

Neil Jacobson is the founder and CEO of Abilicorp, a business innovation consulting company. Neil retired from Wells Fargo Bank as a Senior Vice President. Over the past 40 years Neil has been an advocate and change agent for the economic development of people with disabilities. Most of this advocacy has been as a Board member and past Chair of the World Institute on Disability (WID). He now chairs WID's Center for Economic Growth (CEG). Neil received a BS in Mathematics from Hofstra University and a MBA at Golden Gate University.

Julie Kerksick

Julie Kerksick currently works with the Public Policy Institute on their Pathways Out of Poverty project. She advocates for policies that are proven ways to reduce poverty, particularly for those who are unemployed or working, but still poor. From 2011 to early 2014, Julie Kerksick served as Director of the Office of Economic Security in the Colorado Department of Human Services. The Office includes programs that support low income Coloradans in a variety of ways, including Food Assistance, Colorado Works, energy assistance, refugee programs, child support, food distribution, and vocational rehabilitation. Previously, Ms. Kerksick was the Administrator of the Division of Family and Economic Security (DFES) in the Wisconsin Department of Children and Families. She served in the position from July 2008, when the Department was formed, until January 2011. In that position, she was responsible for the oversight and administration of the W-2, Transitional Jobs, Child Support, Refugee Assistance and Community Service Block Grant programs. For twenty years previous to her appointment as DFES Administrator, Ms. Kerksick worked for The New Hope Project in Milwaukee, Wisconsin, an organization that helped individuals find, get and keep jobs. Their work also focused on the securing post-employment supports, such as tax credits and access to health insurance, to help low income workers move out of poverty. Ms. Kerksick has spent her entire professional career working with and on behalf of unemployed and low-income workers. She has helped design public policy, but has also shared in the responsibility of translating those policies into operating programs and procedures. Ms. Kerksick also serves on the Steering Committee of the National Transitional Jobs Network.

Harold Krent

Dean Harold Krent graduated from Princeton University and received his law degree from New York University School of Law, where he served as notes editor of the Law Review and garnered several awards for excellence in writing. Dean Krent clerked for the Honorable William H. Timbers of the U.S. Court of Appeals for the Second Circuit and then worked in the Department of Justice for the Appellate Staff of the Civil Division, writing briefs and arguing cases in various courts of appeals across the nation. He has been teaching full-time since 1987 and has focused his scholarship on legal aspects of individuals' interaction with the government. His recent book, *Presidential Powers*, is a comprehensive examination of the president's role as defined by the U.S. Constitution and judicial and historical precedents. He also has served as an Associate Reporter for the Restatement of the Administrative Procedure Act. In addition, Dean Krent has served as a consultant to the Administrative Conference of the United States, studying fee shifting in agency litigation and, most recently, assessing SSDI adjudication at the ALJ level. He has also litigated numerous cases with students on behalf of indigent prisoners. Dean Krent joined the IIT Chicago-Kent faculty in 1994. He was appointed associate dean in 1997 and interim dean in 2002 before assuming the deanship on January 1, 2003.

David Mann

David Mann is a senior researcher at Mathematica's Center for Studying Disability Policy, with expertise in the labor force participation, human capital accumulation, and benefit receipt of youth and adults with disabilities. Dr. Mann has participated in several projects for the Social Security Administration (SSA); National Institute on Disability, Independent Living, and Rehabilitation Research (NIDILRR); and Department of Labor, where he examined employment and benefit receipt outcomes of people with disabilities. His research studies have examined the employment and other outcomes of vocational rehabilitation customers, Supplement Security Income and Social Security Disability Insurance beneficiaries, and young adults with childhood onset disabilities. He has a Ph.D. in Economics from the University of Pennsylvania.

Pamela Mazerski

Pamela Mazerski is currently an independent consultant focusing on projects related to improving social insurance programs. Most recently she has been working on improving employment opportunities for various populations, developing disability and supplemental security income policy options, health insurance issues, social insurance research and data analytics projects. She served in numerous senior executive positions at the Social Security Administration (SSA) where she directed SSA's \$80 million disability and income security research budget, and led the development and implementation of numerous research demonstration projects aimed at creating employment opportunities for adults with disabilities as well as youth in adult transition. Pam also has extensive experience developing policy options in the areas of disability, means-tested, and health insurance programs. She also served as a professional staffer

on the House Ways and Means Social Security Subcommittee, where she worked on disability and employment related legislation. Pam holds a BA in Jurisprudence and a Master's in Public Administration from American University.

Mark Meyer

Dr. Mark F. Meyer has over twenty years of experience applying economic theory and quantitative methods to a range of complex business litigation and regulatory matters. Dr. Meyer's experience includes assessing liability and damages for litigations involving firms engaged in financial markets, especially insurance; investigations of insurer insolvencies; antitrust analysis of monopolization, mergers, and price discrimination in a wide range of industries; work in the economics of product distribution and marketing; analysis of regulatory initiatives involving insurance and other industries; and statistical and econometric applications to liability determination, market definition, class certification, and economic damages. Prior to joining CRA, Dr. Meyer was a senior economist at the Princeton Economics Group, Inc., senior managing economist and a director in the New York office of the Law & Economics Consulting Group, Inc., and an economist at the law firm of Skadden, Arps, Slate, Meagher & Flom in New York. He holds a PhD in Economics from the University of Michigan and BSFS in International Economics from Georgetown University.

Mark Perriello

Mark Perriello is an independent consultant with a strong background in issue advocacy and disability policy development. His current clients include disability and mental health organizations, where he is actively supporting their efforts to raise the awareness of disability issues with the 2016 Presidential candidates. As the former President of the American Association of People with Disabilities (AAPD), the nation's largest disability rights organization, Perriello brings strong knowledge, expertise, and insight into the various policy discussions impacting people with disabilities. During his time at AAPD, the organization enjoyed record breaking fundraising, increased grassroots engagement, and an amplified role in policy development at the federal, state, and local level. Prior to his time at AAPD, Perriello worked as a Presidential appointee within the Obama Administration, where he was instrumental in creating one of the most diverse Administrations in U.S. history. Perriello's early career focused on LGBT advocacy having worked at the Human Rights Campaign as the Director of the Political Action Committee, and as Director of Strategy at the Gay & Lesbian Victory Fund. Perriello has served on multiple boards including AT&T's Consumer Advisory Panel, Anthem's National Advisory Board on Improving Services for Seniors and People with Disabilities, Verizon's Consumer Advisory Board, and the Executive Committee of the Leadership Conference on Civil and Human Rights. Perriello is a graduate of Rhodes College in Memphis, TN.

Julia Porcino

Julia Porcino is a mathematician and computer programmer in Epidemiology and Biostatistics at the NIH Clinical Center. Julia received her MS from the University of Oregon and her bachelor's degree from Reed College in Portland, Oregon. She also spent time in 2009 studying math in Budapest, Hungary. Julia's past research focus has been in representation and network theory. She is currently working on the RMD inter-agency agreement with SSA in examining SSA's disability determination process.

David Riemer

David has been active for many years in reshaping Wisconsin and U.S. policies on welfare, poverty, health care, and education. He was chosen in 2010 to serve as a member of the Wisconsin Legislative Council Special Committee on Health Care Reform Implementation, as well as the National Academy of Social Insurance (NASI) Study Panel on Health Insurance Exchanges. David is the author of "The Prisoners of Welfare" and numerous articles on poverty, health care reform, and public administration. He is one of the co-founders of The New Hope Project. David served from 2004-07 as Director of the Wisconsin Health Project, which sought to lower the number of Wisconsin's uninsured and control health care costs. The project was responsible for developing bipartisan legislation to provide all of the state's residents with affordable health insurance and lower the growth of health care costs. David worked as an Atlantic Fellow in Public Policy in London and Oxford, England, in 2002; his research focused on supplementing low-income workers' earnings through the tax system. During 2003, David served as Budget Director for Wisconsin Governor Jim Doyle. In 2004, David campaigned for Milwaukee County Executive. From 1988-2001, David held several high-level jobs for the City of Milwaukee, including Budget Director, Administration Director and Chief of Staff for Mayor John O. Norquist. For most of this period, he was responsible for overseeing the central fiscal, purchasing, IT, and intergovernmental functions of the city government. From 1975-88, David held several positions in government and the private sector. He was legal advisor to Wisconsin Governor Patrick Lucey, served as legal counsel to Senator Edward Kennedy's Subcommittee on Health and Scientific Research, worked as a health policy analyst for the Wisconsin Legislative Fiscal Bureau, prepared a report on Wisconsin's uninsured for the state Department of Health and Social Services, and worked on health care cost containment issues for Time Insurance Company. David received an AB degree from Harvard College in History and Literature (1970) and a law degree from Harvard Law School (1975).

Jason Seligman

Jason Seligman is a Macro Economist in the Office of Economic Policy at the U.S. Department of Treasury. Prior to that, he was an Assistant Professor at the John Glenn School of Public Affairs at The Ohio State University. Dr. Seligman has served in various capacities in both academia and the federal government over the past 15 years. He holds a BA with Honors in Economics from the

University of California at Santa Cruz and received his PhD in Economics from the University of California at Berkeley in 2002.

David Stapleton

David Stapleton is director of Mathematica's Center for Studying Disability Policy. He also directs Mathematica's cooperative agreement with the Social Security Administration (SSA) for the agency's Disability Research Consortium. Since 1991, Dr. Stapleton's research has focused on the impacts of public policy on the employment and well-being of people with disabilities. He currently co-directs the evaluation of SSA's Benefit Offset National Demonstration (BOND) and is a senior advisor to SSA's National Beneficiary Survey and Disability Analysis File. He also serves as senior advisor to several Rehabilitation Research and Training Centers for the National Institute of Disability and Independent Living Research. He has a Ph.D. in economics from the University of Wisconsin-Madison.

Thomas Wickizer

Dr. Thomas Wickizer is the Stephen F. Loeb Distinguished Professor of Health Services Management and Policy and the Chair of the Division of Health Services Management and Policy at The Ohio State University College of Public Health. He previously served on the faculty at the University of Washington School of Public Health from 1989 to 2009, where he was appointed as the Rohm and Haas Distinguished Professor of Public Health Sciences. His research interests include managed care costs and outcomes; occupational health; quality improvement; expenditure growth; and economic outcomes of substance abuse treatment. Much of Dr. Wickizer's research has involved studies of workers' compensation interventions sponsored by the Washington State Department of Labor and Industries. These studies have included evaluations of a managed care pilot, analysis of the effect of drug-free workplace programs, assessment of opioid dosing guidelines, and, more recently, evaluation of a large-scale quality improvement initiative. Findings of Dr. Wickizer's research have been disseminated in numerous scientific journals and through national and international conferences. In addition, Dr. Wickizer has served as principal investigator for projects funded by a variety of organizations including NIH, NIOSH, Medicaid, Abbott Laboratories, the Ohio Departments of Mental Health and Aging, and the Robert Wood Johnson Foundation.

Conor Williams

Conor Williams is the Economic Policy Analyst for the Working Our Way Out of Poverty Project. He also operates a family-owned stone fabrication business which he helped to found. Conor holds an honors BA in Economics from University College Dublin in Dublin, Ireland. Conor started work doing econometric modeling at the Department of Transport in Sydney, Australia followed by a number of years as an economic analyst for an aircraft leasing company in Shannon, Ireland.

Subsequently he worked as an economic policy analyst for the Department of Commerce and Industry, Gaborone, Botswana, facilitated through the Irish aid agency APSO.

Jeffrey Wolfe

Jeffrey S. Wolfe is as an administrative law judge with the Social Security Administration, Office of Disability Adjudication and Review in Tulsa, Oklahoma. He served as a U.S. Magistrate Judge for the Northern District of Oklahoma from 1987 to 1995.

Advisory Council

Advisory Council members have in-depth expertise and experience with the SSDI program and/or those served by the program. Their role is to provide advice, guidance, and feedback to the project's staff and co-chairs, but they will not be asked or expected to support or endorse any recommendation or set of recommendations.

Lawrence Atkins: Lawrence Atkins is currently Executive Director of the Long-Term Quality Alliance and President of the National Academy of Social Insurance. In 2013 he served as Staff Director of the federal Commission on Long-Term Care. Previously, Atkins had served as Executive Director of U.S. Public Policy for Merck & Co. and had held a similar position at Schering-Plough Corporation. Previously, Atkins was President of the consulting firm Health Policy Analysts. During the 1980s, Atkins served as Republican Staff Director and professional staff member of the U.S. Senate Special Committee on Aging. He was also staff to Senator Heinz as Chairman and Ranking Member of the Senate Finance Committee's Subcommittee on Private Retirement Plans. In 1982, he was Senator Heinz's Technical Advisor on the National Commission on Social Security Reform. Atkins was a member of the 1991 Advisory Council on Social Security, the Technical Advisory Panel on retirement savings for the 1995 Advisory Council on Social Security, and NASI's 2010 study panel on Health Insurance Exchanges. A founding NASI member, he received his Ph.D. in social welfare policy from Brandeis University.

Andrew G. Biggs: Andrew Biggs is a resident scholar at the American Enterprise Institute. Prior to joining AEI, he was the principal deputy commissioner of the Social Security Administration (SSA), where he oversaw SSA's policy research efforts and led the agency's participation in the Social Security Trustees working group. In 2005 he worked on Social Security reform at the National Economic Council and in 2001 was on the staff of the President's Commission to Strengthen Social Security. Biggs' work at AEI focuses on Social Security reform, state and local government pensions, and comparisons of public and private sector compensation. He holds a Ph.D. from the London School of Economics and Political Science and Master's degrees from Cambridge University and the University of London.

Barbara Butz: Barbara Butz is the President and CEO of PolicyWorks and also serves as a Managing Partner of The Capstone Consulting, Inc. She has over 40 years of experience in employment, training, and workforce development on the federal, state and local levels. For four years she served as Senior Consultant to MAXIMUS, the Social Security Administration's Operations Support Manager for the Ticket to Work Program, where for two years she served as the National Workforce Team Lead. In this role she had responsibility for training and supporting workforce systems across the country to meet their responsibilities as Employment Networks (job placement agencies) serving people with disabilities receiving SSDI and/or SSI. Barbara also served as the Assistant Secretary for Labor and Employment Security in Florida for four years; State Infrastructure Specialist for Virginia Commonwealth University's National Training Center on Work Incentives, Executive Director of a non-profit employment and training organization;

Director of Employment Programs for an urban Community Action Program; and Program Supervisor for Vocational Technical and Adult Education programs for a public school district.

Mary C. Daly: Mary Daly is Senior Vice President and Associate Director of Research at the Federal Reserve Bank of San Francisco. In addition, she is active in policy work and has published extensively on how Social Security Disability Insurance and Supplemental Security Income affect the behavior and economic well-being of working-age people with disabilities. She is the author of several books, including *Disability Policy in the U.S.: What Went Wrong and a Strategy for Change*, with Richard Burkhauser (2011). Daly served as a Visiting Scholar at the Congressional Budget office in 2011-2012 and as a Social Security Administration Technical Advisory Panel Member in 2006-2007. A member of the National Academy of Social Insurance since 2003, Daly received her Ph.D. in economics from Syracuse University.

Marty Ford: Marty Ford is Senior Executive Officer for Public Policy at The Arc, a national community-based organization advocating for and serving people with intellectual and developmental disabilities and their families. Ms. Ford is a recognized leader in federal public policy affecting people with disabilities, particularly long term services and supports, Medicaid, and Social Security disability issues, and has testified numerous times before Congress. Ms. Ford served three years as Chairperson of the Consortium for Citizens with Disabilities (CCD); served on its Board of Directors for 12 years; and served many years as Co-Chair of various CCD Task Forces. Ms. Ford is Vice-Chair of the Board of Directors of Advance CLASS and has served in numerous long term services and supports policy leadership roles. Ms. Ford is a member of the National Academy of Social Insurance (NASI) and serves on NASI's Board of Directors and its Finance Committee. She was recognized as the distinguished honoree for disability policy at NASI's 25th anniversary celebration in 2011. A member of the American Bar Association, she has served on its Commissions on Disability Rights and Law and Aging. She received her J.D. from the George Washington University National Law Center; M.S. from Pratt Institute; and B.A. from the University of Virginia.

Steve Goss: Mr. Goss is Chief Actuary at the Social Security Administration. He has been with SSA for over 30 years, working in areas related to health insurance and long-term-care insurance as well as pension, disability, and survivor protection. Goss has been a staff participant representing the Office of the Chief Actuary at the President's Commission on Pension Policy, the 1979, 1991, and 1995 Advisory Councils, and the National Commission on Social Security Reform. He worked closely with Congressional staff on the 1983 Social Security Amendments, testified at Committee hearings, and was instrumental in the development of the provision for increasing the normal retirement age.

Ron Haskins: Mr. Haskins is a senior fellow in the Economic Studies program and co-director of the Center on Children and Families at the Brookings Institution. From February to December of 2002 he was the senior advisor to the President for welfare policy at the White House. Prior to joining Brookings, he spent 14 years on the staff of the House Ways and Means Human Resources Subcommittee, first as welfare counsel to the Republican staff, then as the subcommittee's staff

director. He has appeared frequently on radio and television and has written articles and editorials for several newspapers including the Washington Post and New York Times. His areas of expertise include welfare reform, child care, and budget and deficit issues. In 1997, Haskins was selected by the National Journal as one of the 100 most influential people in the federal government.

Andrew Houtenville: Dr. Andrew Houtenville is an Associate Professor of Economics and Research Director of the Institute on Disability at the University of New Hampshire. He is extensively involved in disability statistics and employment policy research. He has published widely in the areas of disability statistics and the economic status of people with disabilities. Dr. Houtenville received his Ph.D. in Economics from the University of New Hampshire in 1997 and was a National Institute on Aging Post-Doctoral Fellow at Syracuse University in 1998/1999. He was also a Senior Research Associate at Cornell University and New Editions Consulting in McLean, Virginia.

Andrew Imparato: Mr. Imparato is the Executive Director of the Association of University Centers on Disabilities (AUCD). Prior to the AUCD, he worked for Chairman Harkin on the U.S. Senate Committee on Health, Education, Labor, and Pensions as a Senior Counsel as well as the Disability Policy Director. He also served as the President and CEO of the American Association of People with Disabilities (AAPD), and he has worked at both the National Council on Disability and the Disability Law Center in Boston. He is widely recognized for his tireless leadership and advocacy for people with disabilities and has been honored numerous times for his work.

Neil Jacobson: Neil Jacobson is the founder and CEO of Abilicorp, a business innovation consulting company that seeks to increase employment for people with disabilities. Neil retired in 2008 from Wells Fargo Bank after 29 years, most recently serving as Senior Vice President in charge of their System Automation Management and Wireless Technology Divisions. Over the past 35 years Neil has been an advocate and change agent for the economic development of people with disabilities. In 1975 he co-founded the CIL Computer Training Program, a nationally recognized training program, enabling people with significant disabilities to become computer programmers. Neil has continued his work on economic development for people with disabilities as a Board member and past Chair of the World Institute on Disability (WID).

Stanford Ross: Mr. Ross received a Harvard Law degree in 1956, and served in the White House on the domestic policy staff of President Johnson from 1967 to 1969; he is currently a retired partner at Arnold & Porter LLP in Washington, D.C. He was Commissioner of Social Security during the Carter Administration, from 1978-1979. Mr. Ross is a Director, former President, and founding member of the National Academy of Social Insurance, and served as Chair of its International Understanding Committee. In addition, he served as a public trustee of the Social Security and Medicare trust funds during the Bush and Clinton Administrations. He became a Public Trustee of Social Security in 1990 and served through 1995. He also served as Chair of the Social Security Advisory Board from 1997-2002.

Robert D. Reischauer: Robert Reischauer is president emeritus of the Urban Institute and one of the two public trustees of the Social Security and Medicare trust funds. He led the Urban Institute for twelve years before he stepped down in February 2012. Between 1989 and 1995, he was the director of the Congressional Budget Office (CBO), after serving as CBO's assistant director for human resources and deputy director. Reischauer was previously a senior fellow in the Economic Studies Program of the Brookings Institution and senior vice president of the Urban Institute. A nationally recognized economist, Reischauer has written and lectured on a wide range of topics including federal budget policy, health reform, social welfare issues, and the Medicare and Medicaid programs. He was a member of the Medicare Payment Advisory Commission from 2000-09 and was its vice chair from 2001-08. He also chaired the National Academy of Social Insurance's project, "Restructuring Medicare for the Long Term." He holds an A.B. from Harvard and a master's and Ph.D. from Columbia.

C. Eugene Steuerle: Eugene Steuerle is the Richard B. Fisher Chair at the Urban Institute and author of a column and blog, the Government We Deserve. Among past positions, he has served as Deputy Assistant Secretary of the Treasury for Tax Analysis, President of the National Tax Association, Chair of the Technical Panel advising Social Security on methods and assumptions, Vice-President of the Peter G. Peterson Foundation, and economic coordinator of the Treasury Department's efforts leading to the Tax Reform Act of 1986. He co-founded the Urban-Brookings Tax Policy Center, the Urban Institute Center on Nonprofits and Philanthropy, and Act for Alexandria, a community foundation that he now also chairs. His research and writings span sixteen books, including *Dead Men Ruling*, *Retooling Social Security for the 21st Century* and *Social Security and the Family*, and over one thousand articles and columns. He received his Ph.D. with distinction in public finance from the University of Wisconsin-Madison.

William Taylor: William C. Taylor spent his entire career with the Social Security Administration's Office of Disability Adjudication and Review (formerly called the Office of Hearings and Appeals), which is responsible for the administrative law judge hearing and Appeals Council review processes. He served for 11 years as the Executive Director of the Office of Appellate Operations and Deputy Chair of the Appeals Council, and for 8 years as Deputy Associate Commissioner of the Office of Hearings and Appeals. On two occasions he received a Presidential Rank Award as a Meritorious Executive in the Senior Executive Service. After his retirement in 2008, he returned to SSA on a limited basis to work on special projects as well as mentoring and training. Mr. Taylor is a graduate of the University of Maryland and the Georgetown University Law Center. He is a member of the Virginia Bar.

Rebecca Vallas: Rebecca Vallas is the Director of Policy for the Poverty to Prosperity Program at the Center for American Progress. Before joining American Progress, Vallas served as the deputy director of government affairs at the National Organization of Social Security Claimants' Representatives, or NOSSCR, where she developed and managed legislative and communications strategies to preserve and strengthen Social Security Disability Insurance and Supplemental Security Income for workers with disabilities. She also served as a co-chair of the Consortium for

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