Social Insurance contributes to economic security and a vibrant economy.
<table>
<thead>
<tr>
<th>Page(s)</th>
<th>Section I. Introduction</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Letter from the Board Chair: <em>Kenneth S. Apfel</em></td>
</tr>
<tr>
<td>2</td>
<td>Letter from the President: <em>Janice M. Gregory</em></td>
</tr>
<tr>
<td>3</td>
<td>About the National Academy of Social Insurance</td>
</tr>
<tr>
<td>4</td>
<td>Strategic Goals: 2009-2011</td>
</tr>
<tr>
<td>5-6</td>
<td>NASI in a Nutshell: FY 2009 Overview</td>
</tr>
<tr>
<td>6</td>
<td>On the Horizon: FY 2010 Preview</td>
</tr>
</tbody>
</table>

**Section II. Policy Research, Education & Communications**

<table>
<thead>
<tr>
<th>Page(s)</th>
<th>Section III. Leadership Development</th>
</tr>
</thead>
<tbody>
<tr>
<td>24</td>
<td>Overview</td>
</tr>
<tr>
<td>25</td>
<td>Internship Programs</td>
</tr>
<tr>
<td>26-27</td>
<td>Washington Internship on Social Insurance</td>
</tr>
<tr>
<td>28-29</td>
<td>Somers Aging and Long-Term Care Research Internship</td>
</tr>
<tr>
<td>30</td>
<td>Nathan J. Stark Internship for Nonprofit Development</td>
</tr>
<tr>
<td>30</td>
<td>Eileen Sweeney Graduate Internship in Disability Policy</td>
</tr>
<tr>
<td>31</td>
<td>Intern Academy</td>
</tr>
<tr>
<td>32</td>
<td>John Heinz Dissertation Award</td>
</tr>
</tbody>
</table>

**Section IV. The NASI Network**

<table>
<thead>
<tr>
<th>Page(s)</th>
<th>Section V. Administration and Financials</th>
</tr>
</thead>
<tbody>
<tr>
<td>33</td>
<td>Letter from the Executive Vice President: <em>Pamela J. Larson</em></td>
</tr>
<tr>
<td>34-35</td>
<td>New Members of the Academy</td>
</tr>
<tr>
<td>36-37</td>
<td>Social Insurance Research Network (SIRN)</td>
</tr>
<tr>
<td>38-41</td>
<td>2009 Robert M. Ball Award</td>
</tr>
<tr>
<td>42-43</td>
<td>Individual Donors</td>
</tr>
<tr>
<td>44</td>
<td>Institutional Supporters &amp; Partners</td>
</tr>
<tr>
<td>45</td>
<td>Ways to Support NASI</td>
</tr>
<tr>
<td>46</td>
<td>Revenue Sources</td>
</tr>
<tr>
<td>47</td>
<td>Expenditures</td>
</tr>
<tr>
<td>48-49</td>
<td>NASI Staff</td>
</tr>
</tbody>
</table>
Dear Academy Members, Associates, Sponsors, Partners and Friends,

In 2011, the National Academy of Social Insurance will celebrate its 25th anniversary. Our country's social insurance system has evolved even since NASI was founded in 1986, and it will continue to evolve over the next generation to meet changing demographic, human and economic needs. Across this evolving landscape, NASI will continue to convene experts, policymakers, researchers, advocates, and young leaders to ensure the viability of our social insurance programs.

NASI's work helps policymakers and leaders adapt our existing income and retirement security systems so that workers, retirees and senior citizens, and their families do not suffer from poverty and economic insecurity. During FY 2009, NASI worked on several in-depth reports on benefit adequacy for vulnerable populations, which includes widowed spouses, low-paid workers, people who have spent time out of the workforce because of childcare or eldercare responsibilities, beneficiaries who live to advanced ages, and older workers with occupational disabilities. The analysis and insights from these reports have been shared with Congress, the new Administration, and other leaders across the country.

NASI's unique and focused research and policy analyses helps prepare our policymakers to tackle existing and emerging challenges.

I would like to thank Margaret Simms for the strong leadership she provided as President of NASI from 2007 to 2009. During Margaret's tenure as President, NASI dealt with financial challenges resulting from an increasingly competitive nonprofit sector, as well as from the effects of the global recession. Under Margaret's leadership, NASI made a structured effort to examine its mission and programs in strategic terms. Our new strategic plan helps to ensure that our resources are efficiently utilized to fulfill the goals of the organization. Over the past year, NASI has focused on building its capacity to achieve our mission: To promote understanding of how social insurance contributes to economic security and a vibrant economy.

As you will read in this report, during FY 2009, NASI continued to shape the public policy dialogue on a range of social insurance issues, including retirement and income security, long-term care, workers' compensation, and how to administer health care reform. The organization covered these issues with a range of tools – from various publications to unique events. NASI issued over two dozen important policy briefs, reports, and working papers in FY 2009 that were widely disseminated and used by reporters and media personnel to contextualize policy coverage. During FY 2009, we held eight events that convened top policymakers (including members of the new Administration and key Congressional staff), researchers, and other experts and practitioners, and we captured and disseminated the knowledge generated through these exchanges through new publications.

As Chair of the Board of Directors of NASI, it is my privilege to represent the organization and its members. I am always happy to discuss NASI's work and our latest research. I can be reached by calling the NASI office at (202) 452-8097.

Sincerely,

Kenneth S. Apfel
Chair

Kenneth S. Apfel is the Director of the Management, Finance and Leadership Program at the University of Maryland. Prior to this, he held the Sid Richardson Chair of the Lyndon B. Johnson School of Public Affairs at the University of Texas. Previously, he served as Commissioner of Social Security. He was also the Associate Director for Human Resources at the Office of Management and Budget (OMB) in the Executive Office of the President. In March 1993, Professor Apfel was appointed by the President to serve as Assistant Secretary for Management and Budget at the U.S. Department of Health and Human Services. Previously, he served as legislative director for Senator Bill Bradley, as well as staff member for the U.S. Senate Budget Committee. A member of the National Academy of Social Insurance since 1998 and co-chair of the NASI study panel, “Uncharted Waters: Paying Benefits From Individual Accounts in Federal Retirement Policy,” he currently serves as Chair of the NASI Board. Professor Apfel received his Masters in public affairs from the LBJ School of Public Affairs at the University of Texas.
Letter from the President: Janice M. Gregory

Dear Academy Members, Associates, Sponsors, Partners, and Friends,

I became the tenth President of the National Academy of Social Insurance on July 1, 2009, which marked the start of Fiscal Year 2010. I am very proud to be back in the leadership of NASI, after having served two terms on the Board of Directors in the 1990s, and also as Chair of the Membership Committee.

For almost twenty-five years, NASI has conducted top flight research on our social insurance programs; successfully educated many people in policy and media positions regarding how these programs work and the challenges and opportunities they face; and brought together individuals with divergent views on these programs for civil discourse and innovative thinking.

In terms of organizational operations, NASI is now in the second year of our current three-year strategic plan, which covers fiscal years 2009-2011. NASI’s goals and priorities for this current and the next fiscal year are as follows:

• Convene key audiences, produce policy analyses and synthesis products and promote the open exchange of ideas to develop solutions to policy problems.
• Communicate NASI’s outputs effectively to key audiences.
• Develop future leaders of social insurance in the United States.
• Use, recognize and sustain the expertise of members in NASI’s work.
• Increase funding to support the mission and vision of NASI.

Overall, NASI will continue its public education efforts to broaden the discussion around social insurance program challenges and solutions. NASI will also continue to focus on measuring the outcome and impact of our work.

NASI’s efforts have encouraged policymakers to focus on ensuring the adequacy of our retirement system. The economic crisis has underscored the policy points that NASI has consistently made over the past decade. But instead of focusing on why we cannot afford Social Security, NASI was ahead of the curve in identifying ways to ensure its solvency. NASI will continue to open up the debate and take the kind of fresh look that will help us reshape our retirement income framework to do a better job overall.

It is an indication of NASI’s centrality in the field of social insurance and public policy that four out of the six experts who testified before the U.S. Senate Special Committee on Aging for a hearing on “Social Security: Keeping the Promise in the 21st Century” (held June 17, 2009) were Academy members. NASI’s membership is comprised of over 800 of the nation’s leading experts on social insurance. Each year, we add new individuals who have made significant contributions to the field. NASI is also developing new leaders in the field of social insurance through programs and outreach targeted at students and professionals early in their career. By collaborating across disciplines and practice areas, NASI will continue to promote informed decision-making to strengthen our social safety nets.

I hope you will join me in continuing to support NASI’s efforts – from maintaining your active member status with membership dues, to attending the annual policy conference, to participating in study panels and leadership development programs, to sponsoring new initiatives that encourage systematic innovation of our social insurance system. NASI cannot accomplish its mission and strategic goals without the vital support of our Members, Associates, partners, and other supporters.

I’m always happy to discuss how NASI can partner with your group to promote shared interests. I can be reached at janice_gregory@nasi.org or by calling the NASI office at (202) 452-8097.

Thank you,

Janice M. Gregory
President

Janice M. Gregory is retired after serving as Senior Vice President for the ERISA Industry Committee (ERIC). She directed ERIC’s legislative affairs from 1984 through 2006. From 1979 through 1983, she coordinated activities of the Subcommittee on Social Security for its Chairman, the Honorable J.J. Pickle of Texas. She was awarded the Social Security Administration Commissioner’s Citation in 1984. Ms. Gregory served as a co-chair for the Academy’s 12th Annual Conference, “Ensuring Health and Income Security for an Aging Workforce,” in January 2000, and completed two terms as NASI’s Vice President in May 2005. She is a contributing author to Prospects for Social Security Reform and Checks and Balances in Social Security, and is principal author of “The Vital Connection: An Analysis of the Impact of Social Security Reform on Employer-Sponsored Retirement Plans” and “Getting the Job Done: A White Paper on Emerging Pension Issues.” In 2003, she was named one of the one hundred most influential people in finance by Treasury and Risk Management magazine. A founding member of the National Academy of Social Insurance, Ms. Gregory holds a master of science in Organization Development from American University.
About the National Academy of Social Insurance

The National Academy of Social Insurance (NASI) is a nonprofit, nonpartisan organization made up of the nation's leading experts on social insurance.

Our mission is to promote understanding of how social insurance contributes to economic security and a vibrant economy. Through NASI's work, social insurance will continue to play a critical role in achieving a civil and fair society by furthering economic justice for workers and families in America.

Social insurance encompasses broad-based systems for insuring workers and their families against economic insecurity caused by loss of income from work and the cost of health care.

Despite the importance of social insurance in the United States, few people know the programs well. The Academy was established as an independent, nonpartisan and nongovernment organization to promote informed discussion and debate on social insurance issues, and to stimulate fresh thinking.

The Academy convenes steering committees and study panels that are charged with conducting research, issuing findings, and, in some cases, reaching recommendations based on their analysis. Members of these groups are selected for their recognized expertise and with due consideration for the balance of disciplines and perspectives appropriate to the project.

NASI’s Key Interest Areas Include:

- Social Security
- Medicare/Medicaid/Health Coverage
- Workers’ Compensation
- Disability
- Long-Term Care
- Unemployment Insurance
- Workforce Issues and Employee Benefits
- Poverty & Income Assistance

Board of Directors (FY 2009)

Kenneth S. Apfel, Chair
Margaret Simms, President
Janice M. Gregory, President-Elect
Jacob Hacker, Vice President
Jennie Chin Hansen, Secretary
Richard A. Hobbie, Treasurer

Nancy J. Altman
Christine Baker
Kathleen A. Buto
Susan Daniels*
Judy Feder*
Michael Graetz*
Jerry Mashaw**
Lisa Mensah
Marilyn Moon**
Patricia M. Owens**
Jill Quadagno
Joseph Quinn
Gerald Shea
William E. Spriggs
Lawrence H. Thompson

*Term began 5/1/09
**Term ended 5/1/09
Strategic Goals: 2009-2011

**Strategic Goal 1**
Convene key audiences, produce policy analyses and synthesis products and promote the open exchange of ideas to develop solutions to policy problems.

**Strategic Goal 2**
Communicate NASI’s outputs effectively to key audiences.

**Strategic Goal 3**
Develop future leaders of social insurance in the United States.

**Strategic Goal 4**
Use, recognize and sustain the expertise of members in NASI’s work.

**Strategic Goal 5**
Increase funding to support the mission and vision of NASI.

Rose Rubin and Shelley White-Means at NASI’s 21st Annual Policy Conference (held January 29-30, 2009)
NASI in a Nutshell: FY 2009 Overview

A glance at NASI’s major activities in FY 2009:

Summer: July 2008 - September 2008


POLICY BRIEF: Social Security and Private Savings: Complementary Roles (Social Security Brief No. 29)

BOOK: Older and Out of Work: Jobs and Social Insurance for a Changing Economy
(Available from the W.E. Upjohn Institute for Employment Research)

MEMBERSHIP: New Member Nominations

EVENT (July 17, 2008): “Embracing Your Future: Interns Discuss Social Security and Medicare”
- 4th Annual Intern Academy

Fall: October 2008 - December 2008

EVENT (October 6, 2008): “Regulating Markets: The Private Abuse of the Public Interest”


MEMBERSHIP: 42 Members accepted into the Academy

Winter: January 2009 - March 2009

REPORT: Strengthening Social Security for Vulnerable Groups

POLICY BRIEF: Long-Term Services and Supports as Part of Health Care Reform: Relief for the Invisible Uninsured?
(Health and Income Security Brief No. 12)

- 21st Annual Policy Conference

WORKING PAPERS: NASI-NAPA Study Panel on Expanding Access to Health Care release ten working papers on key management and administrative issues that are likely to arise as part of current efforts to expand health coverage

(Continued on next page)
NASI in a Nutshell: FY 2009 Overview

A glance at NASI’s major activities in FY 2009 (continued):

**Spring: April 2009 - June 2009**

POLICY BRIEF: *Sharing Risks in a New Era of Responsibility* (Health and Income Security Brief No. 13)

POLICY BRIEF: *Curbing High Health Costs: The Linchpin for Successful Health Reform* (Health and Income Security Brief No. 14)

POLICY BRIEF: *Social Security Finances: Findings of the 2009 Trustees Report* (Social Security Brief No. 30)


EVENT (June 3, 2009): “Strengthening Social Security for Vulnerable Groups”

EVENT (June 17, 2009): “The Quest for Adequate Retirement Income”

EVENT (June 17, 2009): “2009 Robert M. Ball Award Reception”

2009 Winner of the Robert M. Ball Award: Alicia H. Munnell, Center for Retirement Research, Boston College

On the Horizon: FY 2010 Preview

New and upcoming publications and events from NASI:

**Summer: July 2009 - September 2009**

REPORT: *Administrative Solutions in Health Reform*

REPORT: *Workers’ Compensation: Benefits, Coverage, and Costs, 2007*

OPINION POLL & REPORT: “Economic Crisis Fuels Support for Social Security: Americans’ Views on Social Security”


**Fall: October 2009 - December 2009**

REPORT & EVENT (October 30, 2009): *Fixing Social Security: Adequate Benefits, Adequate Finances*

POLICY BRIEF: *When to Claim Social Security Benefits: Questions to Consider*


**Winter: January 2010 - March 2010**

Policy Research & Education

Our economic and public policy landscape is constantly changing. To help prepare our policymakers for the challenges they face today and those that lie ahead (and to help better inform Americans about their economic security), NASI conducts ongoing research and policy analyses within the various inter-related fields of social insurance.

Key Policy Areas in FY 2009

- Social Security
- Medicare/Medicaid/Health
- Workers’ Compensation
- Disability
- Long-Term Care
- Unemployment Insurance

Access to NASI Publications & Resources

Most NASI publications, conference proceedings, and other resources including the Social Insurance Sourcebook, are available for free download at NASI’s website: [www.nasi.org](http://www.nasi.org)
Policy Scholars and Their Proposals


“Restoring Old Age Income Security for Low Wage Workers,” by Patricia Dilley, Levin College of Law

“A New Minimum Benefit for Low Lifetime Earners,” by Melissa Favreault, The Urban Institute

“Innovative Policies to Strengthen Social Security for Low-Wage Workers,” by Tatjana Meschede with Thomas Shapiro and Laura Sullivan, Institute on Assets and Social Policy, Brandeis University

“Crediting Care in Social Security: A Proposal for an Income Tested Care Credit,” by Pamela Herd, La Follette School of Public Affairs, University of Wisconsin, Madison

“Retirement Security for Family Elder Caregivers with Labor Force Employment,” by Shelley White-Means, University of Tennessee, and Rose Rubin, University of Memphis

“Proposal to Strengthen Social Security Benefits for Widows,” by Joan Entmacher and Chad Newcomb, National Women’s Law Center


“Strengthening Social Security for Workers in Physically Demanding Occupations,” by Eric Klieber, Buck Consultants

“Evaluating the Legal and Policy Implications of Judicial, Legislative, and Administrative Protections for Exempt Social Security Benefits and Related Funds Held in Bank Accounts,” by John Infranca

“Strengthening Social Security for Farm Workers: The Fragile Retirement Prospects for Hispanic Farm Worker Families,” by Barbara Robles, School of Social Work, Arizona State University

Policy Research, Education & Communications: Social Security

Strengthening Social Security for Vulnerable Groups (Continued)

Synthesis Report

A synthesis report of this project - titled Strengthening Social Security for Vulnerable Groups - was released at a roundtable session at NASI’s 21st Annual Policy Conference in January 2009. The roundtable session, “Strengthening Social Security: What is at Stake? What Will it Take?”, was led by Virginia Reno (NASI), Mark Schmitt (The American Prospect), and Margot Brandenburg (The Rockefeller Foundation). Over 80 conference attendees participated in this roundtable and were able to meet the authors and discuss next steps. By exposing the vulnerability of rank and file Americans to the risks of a market economy, the financial crisis points to the need to address the adequacy of Social Security to help retirees and families offset losses elsewhere.

In April 2009, Virginia Reno, NASI’s Vice President for Income Security, briefed OMB staff on issues in Social Security benefit adequacy and findings of the project. Reno was also invited to speak at a day-long meeting of President Obama’s Economic Recovery Advisory Board’s (PERAB) Retirement Security Task Force on May 20, 2009. Task Force members in attendance included Richard Trumka (Secretary-Treasurer of the AFL-CIO), Anna Burger (Chair of Change To Win), Martin Feldstein (economic adviser to President Reagan), Roger Ferguson (Task Force Chair and CEO, TIAA-CREF). Also in attendance was Robert Rebelein (Senior Economist for Public Finance, Council of Economic Advisors). Reno presented ideas from the synthesis report, Strengthening Social Security for Vulnerable Groups, about ways to improve Social Security benefits, especially in light of the economic crisis and dwindling retirement savings.

Dissemination Activities

The final synthesis report of this project was shared with Congress, the new Administration, researchers, analysts, and students through the following activities:

Meeting of Vice President Biden’s Middle Class Task Force (January 2009)

“Economic Crisis Underscores Need to Improve Social Security Benefits” -- Article by Virginia Reno appeared in The Hill’s Congress Blog (February 3, 2009)

“Thinking Big, Thinking Forward” Conference (February 11, 2009)

Capitol Hill briefing organized by the The National Committee To Preserve Social Security and Medicare (February 18, 2009)

“Aging in America” Conference (March 2009)

New America Foundation’s “Poverty Forum” (April 2009)

Meeting of the Leadership Council of Aging Organizations (April 25, 2009)

Meeting with Office of Management and Budget (OMB), Income Maintenance Branch (April 2009)


Meeting of President Obama’s Economic Recovery Advisory Board (May 20, 2009)

The Long-Term Care Discussion Group (May 20, 2009)

Meeting with the Leadership Council of Aging Organizations (May 27, 2009)

“America’s Future Now” Conference (June 3, 2009)

U.S. Senate Special Committee on Aging hearing on “Social Security: Keeping the Promise in the 21st Century” (June 17, 2009)

NASI policy seminar on “The Quest for Adequate Retirement Income” (June 17, 2009)

NASI’s “Social Security Academy for Interns: Don’t Leave Washington Clueless about Social Security!” (July 30, 2009)
Election Toolkit

Sponsored by The Ford Foundation

In September 2008, NASI issued an “Election Toolkit on Social Security and Medicare”, which is designed to assist those who are involved in election debates and issue forums, as well as for educators looking for accessible, nonpartisan material for students about social insurance issues. The toolkit was also included in New America Media’s October newsletter.

The Election Toolkit includes the following resources:

Updated Social Security Primer (Presentation in PowerPoint format)

Updated Social Insurance Sourcebook (Web-based fact sheets)

14 NASI Policy Briefs and Reports:


Children's Stake in Social Security (Social Security Brief No. 27 - February 2008)

Children's Stake in Social Security: Key Facts (February 2008)

Social Security: An Essential Asset and Insurance Protection for All (Social Security Brief No. 26 - February 2008)

Social Security and Private Savings

In partnership with the Aspen Institute Initiative on Financial Security (IFS)

In September 2008, in partnership with the Aspen Institute Initiative on Financial Security (IFS), NASI issued the brief, Social Security and Private Savings: Complementary Roles.

The brief concludes: “As insurance, Social Security is about community; everyone shares the risks (of old-age, disability, death of a family worker) and the benefits go to those who experience the insured losses. Savings, in contrast, are liquid assets that can generally be spent for any purpose at any time.”

The brief was shared with the NASI community and with 1,600 activists in the asset building community by IFS. NASI and IFS released the brief at a roundtable on September 11, 2008, at meetings of the Corporation for Enterprise Development in Arlington, Virginia.
Strengthening Economic Security for Elders and Families: The Role of Social Security

Funded by The Atlantic Philanthropies

In December 2008, Virginia Reno produced a 10-page paper, Strengthening Economic Security for Elders and Families: The Role of Social Security. The purpose was to aid the foundation in its strategic planning. The paper provided background on Social Security, assessed the current political and policy debates, and offered near-term and long-term strategies to use Social Security to improve economic security.

2008 Social Security Trustees Report

Supported by The Ford Foundation


The release of this policy brief was followed by a briefing on Capitol Hill on May 15, 2009: “What’s the News in the 2009 Social Security Trustees Report? Policy Responses to the New Projections.” Margaret Simms (NASI) chaired the event, which featured commentary by NASI members, Stephen C. Goss (Social Security Administration), Chuck Blahous (Hudson Institute), Henry Aaron (Brookings Institution), and Virginia Reno (NASI).

When to Claim Social Security: Questions to Consider

In partnership with the Actuarial Foundation

This project assesses the issues that older persons need to consider in deciding when to claim Social Security benefits. The question seems to be straight-forward, but a great deal of confusion surrounds the issues among the public and the experts who advise them. A policy education brief will be released in FY 2010 and disseminated widely. The brief will also be available on the websites of NASI and the Actuarial Foundation.

Advisory Committee

Anna Rappaport, Anna Rappaport Consulting

Alice Wade, Social Security Administration

Joseph Applebaum, U.S. Government Accountability Office
Social Security Benefit Adequacy and Financial Solvency

Sponsored by The Ford Foundation

NASI held a policy seminar on June 17, 2009, called “The Quest for Adequate Retirement Income.” This policy seminar covered the following topics and featured the following presenters:

Opening remarks: Janice Gregory, President of NASI

Commentary: Jason Furman, National Economic Policy Council, Office of the President

Developments in Retirement Income Adequacy (Alicia Munnell, Center for Retirement Research): How are 21st century seniors faring in retirement? What are reasonable goals for wage-replacement? To what extent are retirees achieving those goals? What is the trajectory for Social Security and retirement income adequacy in coming years? What are the implications of recent developments in pensions, savings, 401(k)s, home values, and jobs for the retirement security of boomers and those who follow them?

What Does It Take to Make Ends Meet? (Joan Kuriansky and Shawn McMahon, Wider Opportunities for Women):
What insights can be drawn from new research on measuring economic security for seniors? How does current research help policy makers set retirement income goals? What insights can we draw from new work on an Elder Economic Security Standard in the United States, efforts to update the official poverty thresholds, and international measures of income adequacy (or inadequacy) for families and seniors?

Adequacy for Low-Income Groups as Part of Social Security Solvency (Kilolo Kijakazi, The Ford Foundation):
Which groups are most at risk of having inadequate incomes in old age? Which groups are most reliant on Social Security? Why is it important to address the adequacy of Social Security benefits for low-income workers, families, and elders as part of achieving long-term solvency in Social Security?
Administrative Solutions for Expanding Access to Health Care

Funded by the Robert Wood Johnson Foundation

In partnership with the National Academy of Public Administration (NAPA)

In 2007, NASI and the National Academy of Public Administration (NAPA) convened an expert study panel to conduct a management analysis of issues in expanding access to health care. Over the next two years, the study panel commissioned a series of background papers and developed a final report.

The project team gave a preview of the report at a roundtable session during NASI’s 21st Annual Policy Conference and working papers were released in March 2009. The final report was released at a seminar at the Urban Institute on July 20, 2009. The report has been disseminated widely among various stakeholders and participants in the 2009 healthcare reform efforts. Additional background papers were published separately by NAPA.

Working Papers Commissioned by the Study Panel

“Paying a Fair Share for Health Coverage and Care” by Jill Bernstein, Consultant


“Restructuring Health Insurance Markets” by Elliot K. Wicks, Health Management Associates

“Simplifying Administration of Health Insurance” by Mark Merlis, Consultant

“The Regulation of Private Health Insurance” by Timothy Stoltzfus Jost, Washington and Lee Law School

“Cost Containment and Coverage Expansion” by Mark Merlis, Consultant

“Designing a Mixed Public and Private System for the Health Insurance Market” by Bryan Dowd, University of Minnesota

“Re-figuring Federalism: Nation and State in Health Reform’s Next Round” by Lawrence D. Brown, Columbia University

“Designing Administrative Organizations for Health Reform” by Paul N. Van de Water, National Academy of Social Insurance

“Recent Changes in Dutch Health Insurance” by Kieke Okma, New York University

Study Panel on Administrative Issues in Expanding Access to Health Care

Robert A. Berenson, Co-Chair, Urban Institute

William A. Morrill, Co-Chair, Caliber Associates

Kenneth S. Apfel, University of Maryland

Beth C. Fuchs, Health Policy Alternatives, Inc.

Thomas R. Hefty, Blue Cross Blue Shield United of Wisconsin (retired)

Feather O. Houstoun, William Penn Foundation

Robert E. Hurley, Virginia Commonwealth University (emeritus)

Jack Lewin, American College of Cardiology

Catherine G. McLaughlin, University of Michigan

Sallyanne Payton, University of Michigan School of Law

Michael C. Rogers, MedStar Health

Raymond C. Scheppach, National Governors Association

Mark D. Smith, California HealthCare Foundation
Policy Research, Education & Communications: Workers’ Compensation

Workers’ Compensation Data Project

Supported by the Social Security Administration, the Centers for Medicare & Medicaid Services, and the U.S. Department of Labor

Workers’ Compensation: Benefits, Coverage, and Costs, 2006 is the 11th in a series begun by NASI to provide the only comprehensive national data on this largely state-run program. The study provides estimates of workers’ compensation payments—cash and medical—for all 50 states, the District of Columbia, and federal program providing workers’ compensation.

Workers’ Compensation Data Panel

John F. Burton, Jr., Chair, School of Management & Labor Relations, Rutgers University

Marjorie Baldwin, School of Health Management and Policy, Arizona State University

Peter S. Barth, University of Connecticut

Christine Baker, California Commission on Health and Safety and Workers’ Compensation

Keith Bateman, Property Casualty Insurers Association of America

Leslie Boden, Boston University

Aaron Catlin, Office of the Actuary, Centers for Medicare and Medicaid Services

James N. Ellenberger, Virginia Employment Commission

Shelby Hallmark, Office of Workers’ Compensation Programs, U.S. Department of Labor

Jay S. Himmelman, University of Massachusetts Medical School

Douglas J. Holmes, UWC - Strategic Services on Unemployment and Workers’ Compensation

H. Allan Hunt, W.E. Upjohn Institute

Kate Kimpan, Dade Moeller & Associates

Gregory Krohm, International Association of Industrial Accident Boards and Commissions

Barry Llewellyn, National Council on Compensation Insurance, Inc.

Eric Nordman, National Association of Insurance Commissioners

Mike Manley, Oregon Department of Consumer and Business Services

Frank Neuhauser, University of California, Berkeley

Activities in FY 2010


Robert Reville, RAND


Emily A. Spieler, Northeastern University School of Law

Robert Steggert, Marriott International, Inc.

Alex Swedlow, California Workers’ Compensation Institute

Richard A. Victor, Workers’ Compensation Research Institute

Alex Wasarhelyi, Social Security Administration

Benjamin Washington, Office of the Actuary, Centers for Medicare and Medicaid Services

Policy Research, Education & Communications: Workers’ Compensation

Workers’ Compensation in California and in the Nation: Benefit and Employer Costs Trends, 1989 – 2005

Funded by the California Health Care Foundation

A policy research brief, *Workers’ Compensation in California and in the Nation: Benefit and Employer Costs Trends, 1989 – 2005*, provides details on the California reforms and their impact on long-term benefit and cost trends. Co-authored by Ishita Sengupta and Virginia Reno of NASI and Christine Baker and Lachlan Taylor of the California Commission on Health and Safety and Workers’ Compensation, the brief was featured at the International Forum on Disability Management in Berlin in the fall of 2008. The California analysis was also reprinted in the Fall 2008 issue of *IAIABC Journal*.

Activities in FY 2010

Implications of Developments in Workers’ Compensation for Social Security Disability Insurance

Sponsored by the Social Security Administration


The seminar will draw on NASI experts in workers’ compensation research, practice, and policy. Speakers include scholars and practitioners in workers’ compensation and experts in Social Security disability policy and administration.

Topics to be covered during the seminar include:

Pathways from workers’ compensation to Social Security disability insurance: How do workers’ compensation claimants learn about and decide to file for Social Security? We will explore policies of state agencies and the workers’ compensation claimant’s bar in selected states.

Effect of workers’ compensation retrenchment: What are the implications of workers’ compensation retrenchment on Social Security disability insurance claims and allowances? The seminar will present and discuss the latest research.

Return-to-work strategies: What insights can be gained from return to work initiatives in workers’ compensation? Are they transferable to Social Security disability insurance policies and practices? If so, how? If not, why not?

New insights from SSA Data: What can we learn from fresh analyses of SSA’s administrative data on disabled worker beneficiaries with a connection to workers’ compensation (WC) or other public disability benefits (OPDB)? Does California yield new insights? It is a big state and enacted major reforms in 2003-2004 to curb the growth in WC spending. California also has a state temporary disability program and significant numbers of public employees who might receive OPD benefits.

SSDI and the offset: What are prospects for simplifying administration of the Social Security benefit offset for workers’ compensation? What can be done to ease the administrative burden and equitably serve disabled workers? Are conforming changes needed in the interaction of workers’ compensation and Medicare?
**Pathways to Economic Security for People with Disabilities**

*In partnership with the National Institute for Disability and Rehabilitation Research (NIDRR)*

On October 16, 2008, NASI convened a half-day policy education workshop called “Pathways to Economic Security for People with Disabilities: Social Insurance, Asset Development, and Supported Employment.” This workshop showcased disability and employ-related research findings and initiatives.

**Workshop Speakers and Presenters**

- **Margaret Simms**, NASI
- **Jennifer Sheehy**, NIDRR
- **Margaret Campbell**, NIDRR
- **Johnette Hartnett**, Asset Accumulation and Economic Self Sufficiency, National Disability Institute and University of Iowa College of Law
- **John Kregel**, Workplace Supports and Job Retention, Virginia Commonwealth University
- **Jon Sanford**, Workplace Accommodations, Georgia Institute of Technology
- **Richard Balkus**, Disability Demonstration Projects, Social Security Administration
- **Laurel Beedon**, NASI
- **Sue Suter**, Social Security Administration
- **David Wittenburg**, Mathematica Policy Research
- **Christopher Button**, U.S. Department of Labor
- **Marty Ford**, The Arc and UCP Public Policy Collaboration
- **Susan Daniels**, Daniels and Associates
- **Michael Morris**, National Disability Institute

**Medicare Coverage for Disability Beneficiaries: How Long Must They Wait?**

*Sponsored by the Commonwealth Fund*

At the NASI Annual Policy Conference held on January 30, 2009, a NASI held a special roundtable on “Medicare Coverage for Disability Beneficiaries: How Long Must They Wait?” When Medicare expanded in 1972 to include individuals with significant disabilities, Congress stipulated that people with disabilities must first receive Social Security Disability Insurance (SSDI) for 24 months before gaining Medicare eligibility. This legislation was created to keep costs down and to avoid replacing coverage for a disabled worker still receiving benefits under a private group health plan. An estimated 1.8 million people with disabilities are caught up in this waiting period for Medicare at this time. Many experts believe that it is time to eliminate this wait to provide a healthier foundation for an already sick population.

This roundtable discussion among national experts encouraged attendees to discuss the problem and possible solutions resulting in more thoroughly vetted policy options.
Strengthening Long-Term Care Policy

Sponsored by The SCAN Foundation

On October 14 and October 23, 2008, NASI brought together key stakeholders in the long-term care field to help The SCAN Foundation develop specific objectives and strategies to guide their future grant-making priorities. This series of convenings among long-term care experts, practitioners, and policymakers were held in Burbank, California, and in Washington, DC.

NASI built on these initial expert convenings by putting together a special roundtable on “Preparing the Path to Long-Term Care Reform: Sharing Views and Strategies” at the 21st Annual Policy Conference (held January 30, 2009). The panel included Ed Howard, Alliance for Health Reform, and Anne Montgomery, Senate Special Committee on Aging, as well as experts from AARP and the Service Employees International Union (SEIU).

NASI continued to promote and facilitate discussions regarding long-term care policies at the 2009 Aging in America Conference in March 2009. At this conference, NASI hosted a press briefing on long-term care, a workshop on “Strengthening Social Security for Vulnerable Populations” and a workshop on “Opportunities for Meaningful Change in Long-Term Care.”

In May 2009, Bob Rosenblatt, Senior Fellow at NASI, and Pamela Larson, NASI’s Executive Vice President, spoke to the Long-Term Care Discussion Group of America’s Health Insurance Programs (AHIP) about “Strengthening Social Security’s Role in Long-Term Care.”
Activities in FY 2010

Designing an Initiative on Unemployment Insurance

NASI is developing a year-long project to convene multidisciplinary experts on unemployment insurance and employment assistance to assess what is needed to adapt these programs to the economy and workforce of the 21st century. The project will commission papers and report its early findings at an October 2010 event to commemorate the 75th anniversary of the UI program and will complete its work by the end of 2010.

Issues to be addressed are likely to include:

- Who should be eligible for benefits?
- Are the conditions for receipt of benefits appropriate?
- What can be done about the secular rise in the regular UI exhaustion rate?
- Should the Extended Benefit program be replaced?
- What can be done to improve the financial status of the UI system?

Policy Research, Education & Communications: Economic Policy & Related Topics

Regulating Markets

Funded by
Hubert Humphrey Institute of the University of Minnesota

On October 6, 2008, NASI convened an educational seminar: “Regulating Markets: The Private Abuse of the Public Interest.” At the seminar, NASI members Lawrence Brown and Lawrence Jacobs spoke about their new book, The Private Abuse of the Public Interest: Market Myths and Policy Muddles, with Henry Aaron and Thomas Mann, both of the Brookings Institution, commenting. Joni Lavery moderated the seminar.

Economic Status of the Aged

With funding to support work on income adequacy, Virginia Reno is producing a paper on the “Economic Status of the Aged,” which will be a chapter in the Handbook on Aging and the Social Sciences (edited by NASI member Bob Binstock) and become one or more briefs in the NASI series.

Social Protection

A Ford Foundation Initiative

On May 9-11, 2009, Pamela Larson participated in a Ford Foundation seminar on Social Protection in Lewes, United Kingdom. The conference compared poverty and risk reduction policies in the poorest regions of the world. It was the capstone to a year-long study by the Ford Foundation staff following a plan authored by NASI in February 2008.
Stagnant wages, frozen or terminated pension plans, rising health care costs, and shrinking employer-sponsored health insurance point to a greater need for social insurance. The financial crisis and economic downturn pose new challenges for families and create new pressures on the federal budget. How can social insurance protections be strengthened while taming projected long-term deficits and promoting economic growth? What can be done to control the growth in health spending and improve the quality of care? How should we shape public policies towards retirement income security and health coverage? If additional revenues are needed, how should they be raised? How can policymakers balance the tradeoffs among deficit control, economic stimulus, and the economic wellbeing of American families? Top scholars addressed these issues and more at NASI’s 21st Annual Conference held on January 29-30, 2009.

Conference Co-Chairs

Howard Fluhr, The Segal Company

Robert Greenstein, Center on Budget and Policy Priorities

Renée Landers, Suffolk University Law School
Conference Agenda - Day One: Thursday, January 29, 2009

Welcome and Opening Speaker

Welcome:
Margaret Simms, President, NASI

Opening speaker:
“Sharing Risk In a New Era of Responsibility” by
Jacob Hacker, University of California, Berkeley

Session I: Social Insurance: Two Visions for the Future

How should America cope with risks to economic security that affect virtually everyone, such as illness, loss of earning capacity, and retirement? By 2035, when boomers are retired, what would be ideal policies to have in place? What actions should we take now to realize that vision?

Moderator:
William Rodgers III, John J. Heldrich Center for Workforce Development, Rutgers University

Presenters:

“Mutual Obligation and the American Social Contract” by Stuart Butler, The Heritage Foundation

Luncheon Speaker:

(Agenda continued on next page)

Strategic Goal 1

Convene key audiences, produce policy analyses and synthesis products and promote the open exchange of ideas to develop solutions to policy problems.
Conference Agenda - Day One: Thursday, January 29, 2009
(Continued)

Session II: How Can We Improve Quality and Control Growth in Health Spending?
What tools exist (or need to be developed) to improve the quality of health care and control the growth in spending? What do we know, and how can we apply that knowledge? What do we need to learn?

Moderator:
Judy Feder, Georgetown Public Policy Institute, Georgetown University

Presenters:
“Refining and Applying Existing Tools” by William Scanlon, Health Policy R&D

“The Role of Delivery System Reform” Jay Crosson, The Permanente Federation

“Realigning Incentives to Promote Affordable Quality Care” Joseph Antos, American Enterprise Institute

“Path to High Performance - A 2020 Vision and How to Get There” by Cathy Schoen, The Commonwealth Fund

Do we need to rethink the “three-legged stool” of retirement income? As employers move away from defined benefit pension plans, are we left with just social insurance and personal saving? What vision of an American retirement income system of the future should guide policy?

Moderator:
Ken Apfel, University of Maryland

Presenters:
“The Social Security Leg” by Joseph Quinn, Boston College

“Reforming Social Security to Restrain Costs and Increase Effectiveness” by Andrew Biggs, American Enterprise Institute

“DB Plans - The Real Deal” by Beth Almeida, National Institute on Retirement Security

“Complimentary Roles of Social Security and Private Savings” by Lisa Mensah, The Aspen Institute
Conference Agenda - Day Two: Friday, January 30, 2009

Annual NASI Membership Meeting and Breakfast
(NASI Members only)

Roundtable Discussions

“Preparing the Path to Long-Term Care Reform: Sharing Views and Strategies”
Participants:
Rhonda Richards, AARP
Elizabeth Royal, Service Employees International Union
Ed Howard, Alliance for Health Reform
Anne Montgomery, Senate Special Committee on Aging

“Administrative Solutions for Expanding Access to Health Care”
Participants:
Paul N. Van de Water, NASI/Center on Budget and Policy Priorities
Robert A. Berenson, The Urban Institute
William A. Morrill, ICF Consulting
Terry F. Buss, National Academy of Public Administration

“Strengthening Social Security: What is at Stake? What Will it Take?”
Participants:
Virginia Reno, National Academy of Social Insurance
Mark Schmitt, The American Prospect
Margot Brandenburg, The Rockefeller Foundation

“Medicare Coverage for Disability Beneficiaries: How Long Must They Wait?”
Participants:
Stuart Guterman, The Commonwealth Fund
Jim Verdier, Mathematica Policy Research
Gina Livermore, Mathematica Policy Research
Rachel Shiffrin, Medicare Rights Center

Session IV: What Roles Will Medicare, Medicaid, and SCHIP Fill? (Continued)

Presenters:
“Are Medicare, Medicaid and SCHIP Bridges to Expanding Coverage” by Renée Landers, Suffolk University Law School

“Value-Based Purchasing in Medicare - Going Beyond Pay-for-Performance” by Robert Berenson, The Urban Institute

“Medicaid's Role in Health Reform Efforts” by Diane Rowland, Kaiser Family Foundation

“SCHIP - Now and Then” by Cindy Mann, The Center for Children and Families

“Medicare - Solution or Problem?” by James Capretta, Ethics and Public Policy

Luncheon Speaker
“Curbing High Health Costs: The Linchpin for Successful Health Reform” by John Sweeney, AFL-CIO

Session V: How Will We Pay for the Public Programs We Want?
What sources of revenue are available to pay for rising health care costs and the aging of the population? What kind of tax structure would promote fiscal responsibility and economic growth? Does the U.S. need a value-added tax?

Moderator:
Robert Greenstein, Center on Budget and Policy Priorities

Presenters:
“No Free Lunch - The Case for a Value Added Tax” by Michael Graetz, Yale Law School


“A Promise to Keep - Towards Intergenerational Equity” by Alexander Hertel-Fernandez, Economic Policy Institute

“Budgeting for Future Entitlements” by Alice Rivlin, The Brookings Institution
NASI on the Web

NASI began a major website redesign project in FY 2009. The new site, scheduled for launch in mid-FY 2010, includes enhanced search tools, which will enable site visitors to more easily locate the many resources and publications available for free on NASI’s website. The new site will also feature an enhanced Member Services section. The new searchable Member Directory will enable NASI members to identify colleagues with similar interests or working in issues of mutual concern. These new features are designed to foster formal and informal collaboration among members.

Website re-design made possible thanks to a grant from The Ford Foundation.


In December 2008, NASI launched a new blog called Policies to Promote Economic Security for Families. The NASI blog gathered ideas and recommendations (in the form of blog posts) from NASI members regarding what policies the new Administration and Congress should focus on to promote economic security for American families. At the end of FY 2009, there were over 30 postings to the blog from NASI members. The NASI blog will be integrated into the re-designed website as a new “Discuss” section, which will foster greater dialogue between interested members of the general public and among the NASI community.

NASI in the News

NASI’s policy research products and publications receives coverage in a variety of newspapers, congressional wire services, academic journals, and public policy websites and blogs. Some of the print and web-based publications and organizations that cited NASI’s work in FY 2009 include:

- Docuticker
- Newsday
- Science Blog
- New America Media
- AFSCME
- EHS Today
- Baltimore Sun

Accessing NASI Publications

Most NASI publications are available for free download. Please visit the NASI website: www.nasi.org

Social Insurance Sourcebook

The Social Insurance Sourcebook is a unique resource for journalists and researchers new to the field of social insurance. Please visit the NASI website: www.nasi.org

Strategic Goal 2

Communicate NASI’s outputs effectively to key audiences.
Leadership Development: Overview

Leadership Development and NASI Associates

Students, young professionals, and researchers early in their career who successfully complete one of NASI's leadership development programs are invited to become Associates of the Academy. NASI Associates are promising young leaders in the field of social insurance, public policy, nonprofit management, and/or a closely related field. NASI Associates have:

- Demonstrated a sincere interest in social insurance through course work, dissertations, internships and/or relevant work experience in social insurance and/or related fields;
- Demonstrated a clear understanding of social insurance administration and/or policy through research and policy papers, dissertation, or other relevant scholarly work;
- Distinguished themselves inside and outside of the classroom with a high GPA, outstanding research, writing and/or analytical skills, and strong leadership ability; and are
- Supportive of and willing to contribute to NASI’s goals of furthering public education, developing new leaders, promoting research and providing forums for discussion among experts, stakeholders, policy makers, and administrators in the field of social insurance.

Strategic Goal 3

Develop future leaders of social insurance in the United States.

Strategic Goal 4

Use, recognize and sustain the expertise of members in NASI’s work.

Leadership Development Programs

Internships:

- Washington Internship on Social Insurance
- Somers Aging and Long-Term Care Research Internship
- Nathan J. Stark Internship for Non-profit Development
- Eileen Sweeney Graduate Internship in Disability Policy

Intern Academy

John Heinz Dissertation Award

A Unique Opportunity for NASI Members and Partners

Each year, NASI’s Intern Selection Committees select top students from universities across the United States. These young leaders make a significant contribution to the work of the organizations at which they are placed. If you or your organization is interested in hosting a summer intern or participating in our leadership development programs, please contact Pamela Larson, Executive Vice President of NASI, at plarson@nasi.org or at (202) 452-8097. This is a unique opportunity to help foster future policy leaders and advocates in social insurance.
Internship Programs

Funded by AARP, The Retirement Research Foundation, the Somers, Stark and Sweeney families, individual donors, and by cost sharing from many of the organizations benefiting from the interns’ service.

Each summer, NASI hosts four 12-week internship programs:

(1) Washington Internship on Social Insurance
(2) Somers Aging and Long-Term Care Research Internship
(3) Nathan J. Stark Internship for Nonprofit Development
(4) Eileen Sweeney Graduate Internship in Disability Policy

Each year, outstanding graduate and upper division undergraduate students are selected by each program’s designated Intern Selection Committee. Interns are then matched with various organizations in Washington, DC, based on their qualifications and the organization’s needs. Each intern receives an honorarium of $3,000. Interns are typically hosted by an organization at the request (or thanks to the sponsorship of) a NASI Member.

Throughout the summer, interns from all four programs have the opportunity to interact with NASI Members through a weekly seminar series and through the Intern Academy. The weekly seminar series includes site visits to learn more about social insurance research, practice, and policymaking.

For the 2009 summer program, 18 interns from across the country worked on a variety of policy research and analysis projects, ranging from writing a report on the effects of caregiving on women’s retirement, to helping organize a “Health Care Rally” for 10,000 union members, to analyzing health information technology (HIT) and HIT legislation. This year, the weekly seminars covered a variety of salient policy topics (see schedule in right-hand column). Interns also interacted with their mentors at the annual Robert M. Ball Award Event, which took place on June 17, 2009.
Leadership Development: Washington Internship on Social Insurance

Washington Internship on Social Insurance

Washington Interns have the opportunity to:

Work with leading experts and officials who are recognized authorities on social insurance policy, Social Security, Medicare, Unemployment Insurance, Medicaid, the Children's Health Insurance Program, disability long-term care, health care financing, and related public and private programs; gain valuable work experience; make professional contacts and network in their areas of interest; and discuss current policy issues and attend Congressional hearings.

How 2009 Washington Interns describe their experience

My expectations were exceeded. I was very involved in researching related legislation and creating issue briefs, coming up with topics to write blog posts, and many other in depth projects.

-- Kristen Arnold

I got to do interesting work that was integral to the AFL's work on health care reform and met a number of interesting people that were all quite willing to give me advice and talk to me about their work.

-- Adrienne Alexander

I appreciate opportunity to see and participate in the community organizing and analytical efforts as I think it will be beneficial in my future career.

-- Yuliya Chorna

I enjoyed feeling that I was a valued team member. I also enjoyed being able to work on a national publication [the annual Workers’ Compensation Report]. NASI is a wonderful mentoring environment.

-- Kimberly Soaper

2009 Washington Intern Selection Committee

Laurel Beedon, National Academy of Social Insurance
Nancy Coleman, Consultant
Karen Matsuoka, Office of Management and Budget
Mark Nadel, Georgetown Public Policy Institute
Patrick Purcell, Congressional Research Service

2009 Washington Interns

Oke Agahro
Graduate Student, Washington University - St. Louis
Placement: AARP Advocacy
Supervisor: Martin Burns
Project: Ms. Agahro provided quantitative analysis on weekly field reports, conducted media tracking and press coverage research to inform state and national advocacy strategies. She also assisted Strategic Advocacy Information department of AARP Advocacy by developing, managing and communicating about AARP priority issue campaigns as well as worked to assist staff coordinate “Divided We Fail” messages. In addition, Ms. Agahro managed and helped develop departmental SharePoint site, gathered research and compiled information/recommendations regarding priority advocacy issues and drafted articles for GRA newsletter.

Kristen Arnold
Undergraduate Student, Michigan State University
Placement: Wider Opportunities for Women (WOW)
Supervisor: Stacey Sanders
Projects: Ms. Arnold split her time between the Elder Economic Security Initiative and the Family Economic Self-Sufficiency Project during her time at Wider Opportunities for Women. She wrote issue briefs on bills, researched housing issues related to elder economic security, social insurance issues such as unemployment insurance, paid sick/safe days, and the workforce investment act to developed fact sheet brochures. Ms. Arnold also researched transportation equity to create a paper with transportation policy recommendations. In addition to performing some evaluative work with data to track WOW’s state partners’ outreach efforts and maintain both departments’ blogs on the WOW website.

Adrienne Alexander
Graduate Student, University of Minnesota
Placement: AFL-CIO
Supervisor: Gerry Shea / JoAnne Volk
Projects: Under the direction of the National Field Coordinator for the AFL-CIO, Ms. Alexander preformed research to demonstrate the effects of taxation of benefits across the country, developed talking points for the state affiliates of the AFL-CIO on the major aspects of the health care reform legislation and for testimony before congressional committees, and attended meetings with the AFL-CIO’s coalition of partners, congressional staff and state affiliates. Her duties also included tracking congressional members and outreach, lobbying efforts, helping coordinate/track rapid response efforts, and administrative duties.
### 2009 Washington Interns (Continued)

<table>
<thead>
<tr>
<th>Intern Name</th>
<th>Position, University</th>
<th>Placement</th>
<th>Supervisor</th>
<th>Projects</th>
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<tbody>
<tr>
<td><strong>Yuliya Chorna</strong></td>
<td>Graduate Student, Syracuse University</td>
<td>AFL-CIO</td>
<td>Gerry Shea / Kate Gjertson</td>
<td>Calculated health benefit tax effect on population with different income level and family status, assisted in preparing policy analysis (summaries) and reflect changes to healthcare bills as they went through various congressional committees. She also prepared “health care stories” summary reflecting people's challenges in the current state of health care for posting at the AFL-CIO blog, prepared summaries on health care financing options, kept press monitoring, monitored the Labor targeted actions on the Senate and House members and their reaction, assisted in the organization of the Health Care Rally which brought around 10,000 union members in support of healthcare reform, and attend meetings/briefings/conference calls and prepared brief notes.</td>
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<tr>
<td><strong>Alice Cosgrove</strong></td>
<td>Undergraduate Student, Fordham University</td>
<td>NIRS</td>
<td>Beth Almeida</td>
<td>Produced a “one pager” titled Pension 101, performed research to increase the media contact database for the organization. She also performed Medicare Advantage benefit analysis; supported the policy analysis of legislation affecting Medicare Advantage and health care reform in addition to patient-centered medical home collaborative.</td>
</tr>
<tr>
<td><strong>Rachel Dolan</strong></td>
<td>Graduate Student, Georgetown University</td>
<td>IHPS</td>
<td>Rick Curtis</td>
<td>Researched existing health-co-ops, created a reference guide for exchange provisions in legislation, and assisted with the revision and editing of policy proposals. She also worked with State policy staff on a project to identify and track changes on Medicaid support for nursing home care, home and community-based services as a result of financial downturn, and federal government initiatives including financial support for State Medicaid programs.</td>
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<td><strong>Maura Foley</strong></td>
<td>Undergraduate Student, University of Wisconsin - Madison</td>
<td>CMA</td>
<td>Alfred Chiplin</td>
<td>Reviewed the effectiveness of printed health materials in Pennsylvania hospitals as part of their coordinated care initiative, attended and reported on various briefings/hearings related to Medicare. In addition, she researched relative value systems and physician payments, gathered research and background papers on why “entitlements” matter, worked to determine how to write about this topic for lay audiences.</td>
</tr>
<tr>
<td><strong>Pin-Yi Ko</strong></td>
<td>Undergraduate Student, Stanford University</td>
<td>SHIRE</td>
<td>Ruth Perot</td>
<td>Generated materials for letters of support, presentations, and the SHIRE website in addition to attending briefings and meeting on health and general administrative duties. She also performed National Health Information Technology (NHIT) work, which included, analysis of health information technology and Tri-Comm legislation as well as summarizing health information technology articles.</td>
</tr>
<tr>
<td><strong>Serina Reckling</strong></td>
<td>Graduate Student, University of California - Los Angeles</td>
<td>Grantmakers In Health</td>
<td>Faith Mitchell</td>
<td>Authored an issue paper on the cost of chronic disease, composed summary articles of audio conferences, and researched background papers on issues the program staff were interesting in researching.</td>
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<tr>
<td><strong>Kimberly Soaper</strong></td>
<td>Undergraduate Student, University of North Carolina - Chapel Hill</td>
<td>National Academy of Social Insurance</td>
<td>Ishita Sengupta</td>
<td>Performed various duties in the preparation of NASI's annual workers' compensation report. Those duties included verified data for the report, updating numbers in the report, proofreading the document and writing a “Sources and Methodologies” report to be published online and to accompany the workers' compensation report. She also assisted with events to disseminate NASI research by compiling a list of Capitol Hill contacts. Ms. Soaper also assisted NASI's research and project associates by completing research for current projects and assisting with the planning of the Intern Academy.</td>
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Somers Aging and Long-Term Care Research Internship

The Somers Aging and Long-Term Care Internship is designed to recognize qualified students and provide them with a challenging learning experience. This internship, compared with the Washington Internship on Social Insurance, focuses on aging and long-term care issues and is more research oriented.

Somers interns have the opportunity to:

- Work with leading long-term care policy experts;
- Gain valuable work experience; and
- Make professional contacts and network in their area of interest; and
- Attend relevant seminars, symposia, and make site visits to long-term care facilities.

2009 Somers Interns

Walter Dawson
Doctoral Student, University of Oxford (UK)
Placement: Senate Special Committee on Aging
Supervisor: Debra Whitman
Projects: Mr. Dawson primarily assisted the staff of the US Senate Special Committee on Aging with hearings, background research, investigations, and reports while completing his thesis on “The Impact of Interest Groups on Long-Term Care Policy in the US.”

Krystal Knight
Graduate Student, University of Florida
Placement: CARF
Supervisor: Susanne Matthiesen
Projects: Ms. Knight's projects included creating two fact sheets, one for providers and one for consumers that explain the accreditation process for rehabilitation facilities, the benefits of accreditation, CARF-CCAC and its role in the accreditation process, drafting intents and examples to further explain the new accreditation standards for person-centered long-term care communities, and editing corrections in old standards manual and prepare it for revisions. In addition she research the regulatory environment in the state of California and whether or not there was any room to push for accreditation as “deemed status” in place of state regulation for continuing care retirement communities (CCRCs). She also worked to identify any “champions” for accreditation in the state and compile their contact information.

(Continued on next page)

How 2009 Somers Interns describe their experience

I liked the dynamic nature of the office - that there were always new things that needed to be addressed. This kept the work interesting. -- Walter Dawson

...All of my experience at NASI have been helpful. There isn't one I could have gone without and still had a meaningful internship. -- Krystal Knight

My experience ... provided a substantive research opportunity to not only strengthen my research and policy analysis skills, but enhance my understanding of social insurance programs in order to fulfill my goal of obtaining a graduate degree in health policy. -- Christian Laurence
2009 Somers Interns (Continued)

**Christian Laurence**  
Undergraduate Student, Ithaca College  
Placement: Medicare Rights Center  
Supervisor: Paul Precht  
Projects: Mr. Laurence researched various long-term care consumer coverage options and different proposed financing options for providing long-term care coverage through Medicare. He also helped to identify and update new State Pharmaceutical Assistance Program (SPAP) eligibility standards for Medicare Rights Center’s consumer Medicare Interactive website across the country, the largest independent source of Medicare information and assistance in the U.S. Write policy articles for the organization’s bi-weekly newsletter, Medicare Watch, highlighting current research and Medicare policy updates.

**Maria Rossi**  
Undergraduate Student, Pennsylvania State University  
Placement: Alzheimer’s Association  
Supervisor: Mike Splaine  
Projects: Ms. Rossi primarily spent her time researching state statues for state-funded biomedical-biotechnology research programs and wrote a compare and contrast policy analysis. She also researched lifespan respite and developed a fact sheet distributed to all of the local chapters of the Alzheimer’s Association, researched state statues to find information on Alzheimer’s research state plans in addition to researching state long-term care partnerships.

**Alma Vega**  
Doctoral Student, University of California - Berkeley  
Placement: AARP Foundation  
Supervisor: Deborah Briceland-Betts  
Project: Ms. Vega researched and wrote a report on the effects of caregiving on women’s retirement and drafted memos of understanding between AARP Foundation and an organization with whom they collaborate. She also translated a questionnaire from English to Spanish and interviewed organizations on the efficacy of an AARP Foundation project.

**Kelsey Walter**  
Graduate Student, Augsburg College  
Placement: National Health Policy Forum  
Supervisor: Carol O’Shaughnessy  
Projects: Ms. Walters’s main projects included researching and writing a National Health Policy Forum draft on Assisted Living and participating in site visits and forums, as well as attending pertinent policy and planning meetings.

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**How 2009 Somers Interns describe their experience**

“The staff [at Alzheimer’s Association] was very interested in working with me, learning about my interests and teaching me along the way. Doing this allowed me to gain strong bonds with others in the office and not just my preceptor.”  
-- Maria Rossi

“I loved the intelligent, conscientious, and extremely supportive individuals with whom I worked. I felt supported at every moment.”  
-- Alma Vega

“I enjoyed the chance to write a professional paper that may be published on the agency’s website.”  
-- Kelsey Walter
Nathan J. Stark Internship for Nonprofit Development

Nathan J. Stark was instrumental in ensuring the future of several Washington, DC-based not-for-profit health policy organizations by stabilizing their finances and governance structures and mentoring their leaders. He left a legacy of lessons and results for improving health policy through fund-raising, governance, and leadership development.

The Nathan J. Stark Internship for Non-Profit Development provide students with the opportunity to learn about non-profit organizations, how they work, how they raise funds, and how they make a difference. Interns will be based at the National Academy of Social Insurance or another non-profit organization.

2009 Stark Intern

Hiram Lopez
Undergraduate Student, University of California - Santa Barbara
Placement: National Academy of Social Insurance

Projects: As the Nathan J. Stark intern, Mr. Lopez learned how the NASI Board of Directors works firsthand, including writing up the Board meeting minutes and worked on the donor appreciation tasks for the Robert M Ball Awards. He also worked on selected development tasks for NASI's long-term care and health policy projects and was responsible for making sure the NASI Associates from past years are up-to-date on opportunities for their continued participation in NASI.

Eileen Sweeney Graduate Internship in Disability Policy

Eileen P. Sweeney devoted her life to improving the lives of people with disabilities, children, battered women, the poor, and the elderly. Her early Washington career was devoted to disability issues and she played a key role in achieving the disability benefit reforms of 1983 and 1984. She subsequently turned her attention to other vulnerable populations, the needs of children, those served by the Temporary Assistance for Needy Families (TANF) program, and the Social Security and Supplemental Security Income (SSI) programs.

NASI, in partnership with the Children's Defense Fund (CDF) and the Center on Budget and Policy Priorities (CBPP), established the Eileen Sweeney Graduate Internship in honor and memory of Eileen. This program selects graduate students aspiring to a career in social policy with a focus on disability. The Sweeney Intern has the opportunity to:

- Work with leading disability policy experts;
- Gain valuable work experience; and
- Make professional contacts and attend relevant seminars, and symposia.

2009 Sweeney Intern

Annie Goldsand
Graduate Student, Arizona State University
Placement: AARP Foundation

Projects: Ms. Goldsand's projects included creating a tool for Hispanic or African American women to access public benefits i.e. SSDI: analyze the barriers, and create a tool that assists them in navigating the public benefits system and developing an annotated bibliography /fact sheet for the AARP Foundation and other organizations when presenting on public benefits. She also worked to suggest legislation to enhance accessibility of public benefits, develop a distribution plan for the tools, and secure one new partnership that will use these tools. In addition she coordinated the updating of state fact sheets and developed the infrastructure to market and distribute the tools to volunteers and organizations serving low-income communities.

How 2009 Stark and Sweeney Interns describe their experience

I liked everything about my placement, but I was exceptionally grateful for the friendly work environment. -- Hiram Lopez

I loved being in an environment that was challenging, and therefore having to pull myself “up” and learn and challenge myself even more. -- Annie Goldsand
Leadership Development: Intern Academy

Intern Academy

“Embracing Your Future: Interns Discuss Social Security and Medicare” - 4th Annual Intern Academy


On July 17, 2008, NASI convened its fourth annual Summer Intern Academy, “Embracing Your Future: Interns Discuss Social Security and Medicare.” Attended by over 90 individuals, the Intern Academy offered interns, students, and others an opportunity to discuss and debate the future of Social Security programs and better understand the challenges facing 2008 presidential candidates as they worked with Social Security and Medicare policy. Attendees represented a wide variety of academic disciplines, geographic locations and organizations. Racial and ethnic diversity information was self-reported, and while a majority of attendees were white, there were also six Asian, six African-American, one Latino and two multi-racial interns who attended the academy. NASI created Facebook and LinkedIn pages to insure that the event was effective marketed to it target audience.

The day-long seminar featured prominent guest speakers and expert panels including NASI members Douglas Andrews, Paul Van De Water, Stephen Goss, Katherine Thornton, Joni Lavery, Thomas Miller, and Nancy Altman, in addition to, an interactive activity and opportunities for networking. The interactive activity provided attendees the opportunity to formulate their own recommendations for fixing Social Security’s long-term financing shortfall. As a result of the activity, participants showed no interest in raising the tax or rate but generally were in favor of raising the earnings limit subject to Social Security tax. Another popular option was to raise the retirement age for full benefit entitlement to age 68, views are generally consistent with surveys taken of the views of the American public at large.

Activities in FY 2010

“Social Security Academy for Interns: Don’t Leave Washington Clueless About Social Security” - 5th Annual Intern Academy

Supported by The Ford Foundation and The Rockefeller Foundation

With donations from DC United, E Street Cinema, the National Aquarium in Baltimore, and the International Spy Museum

On July 30, 2009, NASI convened its fifth annual summer intern academy. The 2009 Intern Academy, “Social Security Academy for Interns: Don’t Leave Washington Clueless about Social Security,” offered interns, students, and others an opportunity to discuss and debate the future of Social Security with peers and experts in the social insurance field.

This free event, attended by 82 individuals featured expert speakers and an interactive activity, which provided attendees the opportunity to make their own recommendations for future Social Security policy changes. This activity resulted in a majority of attendees recommending an improvement in Social Security benefits and an increase in Social Security revenue to sustain those improved benefits. As a measure of the success of the Social Security Academy, NASI had fifty-nine attendees complete event evaluation forms at the end of the event. Some 45 of those who completed evaluations reported the event as either “Excellent” or “Very Good” out of a total average number of 53 responses, or 85%.
Leadership Development: John Heinz Dissertation Award

John Heinz Dissertation Award

Sponsored by the Teresa and John Heinz Fund of the Heinz Family Foundation

The John Heinz Dissertation Award recognizes and promotes outstanding research in social insurance by leading young scholars. The Award is given to the author of the best dissertation on a topic relevant to the planning and implementation of social insurance policy. Each year, the Heinz Dissertation Award Selection Committee reviews nominations received from universities across the country.

The winner of the 2009 John Heinz Dissertation Award was Lauren Hersch Nicholas, currently a Postdoctoral Research Fellow at the University of Michigan. Nicholas wrote her dissertation on “Medicare Advantage? Managed Care and Medicare Quality, Cost and Enrollment” while she was a doctoral student in the Department of Social Policy and Policy Analysis at Columbia University. Her dissertation was nominated for the award by Irwin Garfinkel, Mitchell I. Ginsberg Professor of Contemporary Urban Problems at Columbia University School of Social Work. The award, which includes a $2,500 prize, was presented during NASI’s 21st Annual Conference in Washington, DC.

The John Heinz Dissertation Award is issued in honor of Senator John Heinz. As a member of the Senate Finance Committee, he helped chart the Social Security rescue effort in 1983 and worked tirelessly to insulate the Social Security Trust Funds from the rest of the Federal budget. John Heinz was a leading expert in the Senate on private pensions and health care and aging policy. He was a member of the Academy’s Board of Advisors from the organization’s inception in 1986. Robert M. Ball, Founding Chair of NASI, said, “John Heinz was a leading proponent of Social Security with a true appreciation of the value of social insurance principles in developing public policy. He was a true supporter of the National Academy of Social Insurance and contributed importantly to its objectives.” NASI is privileged to award this prize in his honor.

Heinz Dissertation Award Selection Committee

Robert Hudson, Chair, Boston University,

Christine Bishop, Brandeis University

Rashi Fein, Harvard Medical School

James Morone, Brown University

Lauren Nicholas and Robert Hudson
Dear Academy Members, Associates, Sponsors, Partners, and Friends,

In 1986, the founders of NASI began creating a community of experts with the ability to deepen public understanding of social insurance issues and policies.

As this FY 2009 Annual Report reflects, NASI has developed a sizeable foundation of human capital that continues to preserve what is good about the past, while producing knowledge needed for today and for the future.

Among NASI’s strengths are:

• A reputation for excellence in its nonpartisan information on social insurance issues;

• A large and diverse membership and leadership;

• A growing cadre of young Associates who expand NASI’s capacity to promote in inter-generational dialogue;

• An ability to convene large interdisciplinary conferences, as well as more specialized seminars and workshops, which yield tremendous learning value to attendees and the sponsors who support these events;

• A strong network of funders and supporters, including federal government agencies who annually support NASI’s workers’ compensation project and state government agencies who provide annual data;

• A broad network of nonprofit partners who help to magnify NASI’s impact, while NASI enhances their capacity to fulfill their respective missions.

NASI’s uniqueness in today’s policy environment is its member-volunteers – experts and accomplished professionals from various areas of disciplines and practice. Our members value and believe in NASI’s mission, and they want NASI to be more aggressive in presenting its message and the impact of its work. We will accomplish this with new communication strategies and technologies. In FY 2010, we will launch a re-designed website that will help NASI members more easily collaborate with each other and help site visitors locate the resources they need.

NASI has achieved maturity as a center of intellectual activity, and the activities listed in this 2009 Annual Report reflect our capacity to produce unique research and valuable insights. We look forward to amplifying our impact among key audiences, including:

• Executive and legislative branch policymakers and thought leaders
• The media
• Young leaders (from students who come to DC to learn about public policy to young professionals at the start of their careers)

• Organizations representing a broad spectrum of stakeholders and interested parties (such as youth, advocacy, women, civic, business and labor organizations, communities of color, and others)

Over the past 24 years, NASI has hosted 21 annual conferences, increased its membership to over 800 experts and leaders, and engaged over 300 young people through internships, conferences, and recognition of their research. On the revenue side, the organization has raised over $28 million in foundation grants, government contracts, corporate, labor and individual donations, dues, fees for service, royalties, and three bequests (from Mary Ross, Robert M. Ball, and Anne Somers).

In FY 2009, NASI convened hundreds of individuals – through our annual conference, study panels and other meetings – to analyze how we can strengthen America’s social insurance. Our programs have highlighted key policy considerations and produced road maps for providing economic security for workers and families.

As you read this annual report, I hope you will note planned activities that you would like to help us carry out. I look forward to hearing your ideas and recommendations for the future.

Thank you,

Pamela J. Larson
Executive Vice President
The NASI Network: New Members of the Academy

Membership in the National Academy of Social Insurance

Over 800 of the nation’s leading experts on social insurance are members of the National Academy of Social Insurance. Members’ affiliations include universities, think tanks, business, labor, legislative and executive branches of the federal or state governments, and interest groups. Academy Members include policy analysts in income security and health care financing, economists, political scientists, physicians, actuaries, administrators of public and private benefit programs, social workers, sociologists, historians, journalists and scholars and practitioners in related fields.

Criteria for Membership

Membership is an honor for which individuals are nominated by two current Academy members. Individuals are considered for membership if they:

Have demonstrated a sustained interest in social insurance and/or related fields. Social insurance includes broad-based systems for insuring workers and their families against economic insecurity caused by loss of income from work or the cost of health care. The Academy’s scope includes such social insurance systems as Social Security, Medicare, unemployment insurance, workers’ compensation and related social assistance and private employee benefits.

Have distinguished themselves by improving the quality of research, teaching, policy making, administration or financing of the systems mentioned above; and

Are supportive of and willing to contribute to the Academy’s goals of furthering public education, developing new leaders, promoting research and providing forums for discussion among experts, stake-holders, policy makers, and administrators in the field.

Process for Selecting New Members

The Membership Committee meets to review nominations in light of the membership criteria above and makes recommendations to the Academy’s Board of Directors. The Board acts on the Committee’s recommendations. Those approved by the Board are invited to join the Academy.

2008 Membership Committee

Jill Quadagno, Chair, Florida State University

Joseph Applebaum, U.S. Government Accountability Office

Charles Betsey, Howard University

John F. Burton, Jr., Rutgers University

Marty Ford, The Arc and UCP Public Policy Collaboration

Katie Horton, HealthPolicy R&D

Regina Jefferson, The Catholic University of America

New Members (December 2008)

Congratulations to the forty-two individuals who were accepted as members of the National Academy of Social Insurance in 2008! (Listed in alphabetical order)

Alan Auerbach
University of California, Berkeley

Cynthia Bascetta
Government Accountability Office

Daniel Beland
Johnson-Shoyama Graduate School of Public Policy, University of Saskatchewan

Brian Boon
Commission on Accreditation of Rehabilitation Facilities

Craig Caplan
Centers for Medicare and Medicaid Services

Christopher Chaplain
Social Security Administration

Robert McGarrah, AFL-CIO

Terry Nixon

Jonathan Oberlander, University of North Carolina, Chapel Hill

Ralph Smith, Congressional Budget Office

(Continued on next page)
### The NASI Network: New Members

**New Members (Continued)**

<table>
<thead>
<tr>
<th>Name</th>
<th>Affiliation</th>
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<tbody>
<tr>
<td>Kerwin Charles</td>
<td>University of Chicago</td>
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<tr>
<td>Courtney Coile</td>
<td>Department of Economics, Wellesley College</td>
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<td>Russell Davis</td>
<td>Summit Health Institute for Research and Education</td>
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<td>John Dyer</td>
<td>Food and Drug Administration</td>
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<td>Barry Eigen</td>
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<td>Gary Engelhardt</td>
<td>Syracuse University</td>
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<tr>
<td>Ingrid Evans</td>
<td>National Association of State Work Force Agencies</td>
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<tr>
<td>Gerry Fairbrother</td>
<td>Cincinnati Children’s Hospital Medical Center</td>
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<td>Lynda Flowers</td>
<td>AARP</td>
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<tr>
<td>Lynn Friss Feinberg</td>
<td>Family Caregiver Alliance</td>
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<tr>
<td>Thomas Gustafson</td>
<td>Arnold &amp; Porter, LLP</td>
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<td>Robert Guthrie</td>
<td>Curtin University of Technology</td>
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<td>Alvin Headen</td>
<td>North Carolina State University</td>
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<td>Peter Heller</td>
<td>SAIS, The John Hopkins University</td>
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<td>G. William Hoagland</td>
<td>CIGNA</td>
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<td>Kim Holland</td>
<td>Insurance Commissioner of the State of Oklahoma</td>
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<tr>
<td>Denise Holmes</td>
<td>Association of Academic Health Centers</td>
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<td>Douglas Holmes</td>
<td>UWC</td>
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<tr>
<td>Douglas Holtz-Eakin</td>
<td>DHE Consulting, LLC</td>
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<td>Ken Jacobs</td>
<td>University of California, Berkeley</td>
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<td>Laurence Kotlikoff</td>
<td>Boston University</td>
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<tr>
<td>Joan Kuriansky</td>
<td>Wider Opportunities for Women</td>
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<tr>
<td>Thea Lee</td>
<td>AFL-CIO</td>
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<tr>
<td>Christine MacDonell</td>
<td>Commission on Accreditation of Rehabilitation Facilities</td>
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<tr>
<td>George A. (Sandy) Mackenzie</td>
<td>AARP</td>
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<tr>
<td>Anne Montgomery</td>
<td>U.S. Senate Special Committee on Aging</td>
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<tr>
<td>Daniel O’Brien</td>
<td>Social Security Administration</td>
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<tr>
<td>Thomas Parrot</td>
<td>Social Security Administration</td>
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<tr>
<td>Joseph Piacentini</td>
<td>U.S. Department of Labor</td>
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<tr>
<td>Bruce Siegel</td>
<td>George Washington University Medical Center</td>
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<tr>
<td>Brian Smedley</td>
<td>The Joint Center for Political and Economic Studies</td>
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<tr>
<td>David Stoesz</td>
<td>Virginia Commonwealth University</td>
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<tr>
<td>Juliann Sum</td>
<td>University of California, Berkeley</td>
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<td>Margaret Weir</td>
<td>University of California, Berkeley</td>
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<tr>
<td>Julie Whittaker</td>
<td>Congressional Research Service</td>
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<tr>
<td>Alvin Winters</td>
<td>Social Security Administration</td>
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Social Insurance Research Network (SIRN)

Part of the Social Science Research Network (SSRN), SIRN is a series of five e-journals that publish abstracts of research papers in all areas of social insurance. SIRN is designed to circulate abstracts of research papers (both working and published papers) in all areas of social insurance, including poverty and inequality.

Accessing the Social Science Research Network (SIRN)

To download or submit papers, or for more information, please visit the SIRN website: www.ssrn.com/sirn/index.html or call the NASI office at (202) 452-8097.

SIRN E-Journals

Journal on Disability Income & Work Injury Compensation
Edited by: Edward H. Yelin, University of California, San Francisco and William G. Johnson, Arizona State University

This journal publishes abstracts of working papers and papers accepted for publication on all topics related to disability insurance and workers' compensation. This includes papers on workers' compensation, social security disability insurance, private sick leave and disability insurance, family medical leave, and supplemental security income.

Journal on Health Care Delivery & Financing
Edited by: Katherine Swartz, Harvard School of Public Health and Timothy S. Jost, Washington and Lee University School of Law

This journal publishes abstracts of working papers or papers accepted for publication concerning health insurance, health care financing and delivery systems (including long term care), and health care quality.

Journal on Poverty, Income Distribution & Income Assistance
Edited by: Peter Edelman, Georgetown University Law Center and Timothy Smeeding, Syracuse University

This journal publishes abstracts of working papers and papers accepted for publication on topics related to income distribution, poverty and income assistance. Programmatically, it includes Supplemental Security Income, Temporary Assistance to Families with Needy Children, the Earned Income Tax Credit, Food Stamps, individual development accounts, Medicaid and other federal, state or local systems designed to ensure adequate economic resources for low-income individuals and families.
The NASI Network: Social Insurance Research Network (SIRN)

NASI sponsors the e-journals within SIRN to increase the cross-disciplinary conversation about social insurance. All active NASI members receive a free subscriptions to SIRN. NASI Members also volunteer as editors for each journal. The journals are open to non-NASI members who subscribe to SIRN/SSRN. At the end of FY 2009, there were over 240,000 downloads for all papers in all five journals of SIRN.

SIRN E-Journals (Continued)

*Journal on Social Security, Pensions & Retirement Income*
Edited by: Patricia E. Dilley, University of Florida

This journal publishes abstracts of working papers or papers accepted for publication on all topics related to old age pensions and retirement. This includes papers on social security, employment based pensions and other publicly provided or tax-favored mechanisms for retirement income.

*Journal on Unemployment Insurance*
Edited by: Marc Baldwin, Washington State Employment Security Department

This journal publishes abstracts of working papers and papers accepted for publication on all topics related to unemployment compensation and services. It includes papers on the federal-state unemployment insurance system, the design and delivery of job search and training services, challenges faced by displaced, dislocated and unemployed workers.

<table>
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<th>E-Journal Title</th>
<th>Activity from 2005-2009 (Cumulative)</th>
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<td>Total # of Papers</td>
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<td>Journal on Disability Income &amp; Work Injury Compensation</td>
<td>96</td>
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<tr>
<td>Journal on Health Care Delivery &amp; Financing</td>
<td>1,154</td>
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<tr>
<td>Journal on Poverty, Income Distribution &amp; Income Assistance</td>
<td>739</td>
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<td>Journal on Social Security, Pensions &amp; Retirement Income</td>
<td>1,226</td>
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<td>Journal on Unemployment Insurance</td>
<td>293</td>
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<td>Totals</td>
<td>3,508</td>
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</table>

Strategic Goal 2
Communicate NASI's outputs effectively to key audiences.

Strategic Goal 4
Use, recognize and sustain the expertise of members in NASI’s work.
2009 Robert M. Ball Award for Outstanding Achievements in Social Insurance

The winner of the 2009 Robert M. Ball Award is **Alicia H. Munnell**, Peter F. Drucker Professor of Management Sciences and Director of the Center for the Retirement Research at Boston College. Each year, the Robert M. Ball Award is presented to an individual whose recent work has made a significant impact on the U.S. social insurance system. Munnell was selected for the 2009 Award because of her accomplishments in furthering public understanding and informed policymaking on pensions and retirement security. She has focused on communicating complicated issues to diverse audiences: the Congress, the media, the business world, and other public groups. In addition to serving as the first President of NASI, Munnell also built the Retirement Research Center at Boston College, which promotes informed policymaking and implementation.

The award is named in honor of **Robert M. Ball**, Commissioner of Social Security from 1962 to 1973, who has been the single most influential individual in advancing American social insurance programs for 60 years. Ball founded NASI in 1986 and continued to advise presidential administrations and policy-makers and write on Social Security, Medicare, national health insurance and welfare until his death in January 2008 at the age of 93.

**Alicia H. Munnell** is the Director of the Center for Retirement Research at Boston College and the Peter F. Drucker Professor in Management Sciences at Boston College’s Carroll School of Management. Previously, Prof. Munnell was a Member of the President's Council of Economic Advisers and Assistant Secretary of the Treasury for Economic Policy. She spent most of her professional career at the Federal Reserve Bank of Boston, where she became Senior Vice President and Director of Research in 1984. Prof. Munnell is currently a member of the American Academy of Arts and Sciences, the Institute of Medicine, the National Academy of Public Administration, and the Pension Research Council at Wharton. She is a member of the Board of the Wheeling-Pittsburgh Steel Corporation, The Century Foundation, the National Bureau of Economic Research, and the Pension Rights Center. She currently serves on the Advisory Board of *The Journal on Social Security, Pensions, and Retirement Income* of the Social Insurance Research Network (SIRN). A founder and first President of the National Academy of Social Insurance, Prof. Munnell earned her Ph.D. in Economics from Harvard University.

**Nominating Committee**

Lisa Mensah, Chair, The Aspen Institute

Peter A. Diamond (2008 Winner), Massachusetts Institute of Technology

Lori L. Hansen, Consultant

Judith R. Lave, University of Pittsburgh

Hans Riemer, AARP Public Policy Institute
The NASI Network: 2009 Robert M. Ball Award

Honorary Co-Chairs
Kenneth S. Apfel
Jo Anne B. Barnhart
Alan Blinder,
Lisle C. Carter
Senator Edward M. Kennedy
Senator John F. Kerry
Congressman Earl Pomeroy
Stanford G. Ross
Janet Yellen

Event Committee
Henry J. Aaron, Co-Chair
Nancy J. Altman, Co-Chair
Jeffrey Brown
Gary R. Burtless
Peter A. Diamond
Andrew D. Eschtruth
Stephen C. Goss
Eric Kingson
Lisa Mensah
Michael Orszag
Hans Riemer
John Rother
Steven Sass
Annika Sundén

Alicia Munnell and family

The Honorable Congressman Earl Pomeroy
The NASI Network: 2009 Robert M. Ball Award

Kenneth S. Apfel (Chair of NASI’s Board) with Michael S. Graetz (Member, Board of Directors)

Margaret Simms (President of NASI) with Janice Gregory (President-Elect of NASI)

Clark Munnell, Henry Healy, and Alicia Munnell
The NASI Network: 2009 Robert M. Ball Award

2009 Robert M. Ball Award Donors

NASI would like to recognize and thank the following organizations, companies and individuals for their generous support of the 2009 Robert M. Ball Award (listed in alphabetical order by giving level):

**Patrons ($5,000)**
- AARP
- National Committee to Preserve Social Security and Medicare

**Sustainers ($2,500)**
- AFL-CIO
- Elm Annuity
- Margaret Simms and Charles Betsey
- Kaiser Permanente
- The Century Foundation

**Benefactors ($1,000)**
- Amerigroup
- Kenneth S. Apfel
- Jacob Hacker
- Walter H. Haydock
- Richard Hobbie
- Beth Kobliner
- Jerry L. Mashaw and Anne U. MacClintock
- The Segal Company
- The Society of Actuaries

**Sponsors ($500)** (Continued)
- Lisa Mensah
- Marilyn Moon
- National Health Policy Group
- National Institute on Retirement Security
- Pension Rights Center
- Jill Quadagno
- Joseph F. Quinn
- Robert Reischauer
- Virginia P. and Lee Reno
- Hans Riemer
- Alice Rivlin
- Stanford G. Ross
- Steven Sass
- Isabel Sawhill
- Lawrence H. Thompson
- Clara Beth and Paul Van de Water
- Bruce Vladeck

**Friends ($250)** (Continued)
- Bob Greenstein
- John C. Hambor
- Lori Hansen
- Ed Howard
- Eric Kingson
- Clark Munnell
- Hank Patterson
- James Poterba
- Anna M. Rappaport
- Jane L. Ross
- Anthony Sarmiento
- Schering Plough
- Robert Y. Shapiro
- Janet Shikles
- Nancy G. Shor
- Mauricio Soto
- Eugene Steuerle
- Annika Sundén
- Katherine Swartz
- Eric Toder
- Stephen Urkus
- Denton R. Vaughn
- Christian Weller
- WISER
The NASI Network: Individual Donors

Individual Donors

NASI would like to recognize and thank the following individuals for their generous support of NASI’s mission and programs during FY 2009 (in alphabetical order by giving level): (Note: Robert M. Ball Award donors are listed on page 41)

**Visionaries ($1,000 and above)**  **Strategists ($500 and above)**  **Educators ($300 and above)**

- Douglas Andrews  
- Doris Ball  
- Carroll L. Estes  
- Richard A. Hobbie  
- Patricia Owens  
- David Stark  
- Konnie K. & Paul S. Stark  
- Lawrence Summers

- Joel Kavet  
- David C. Lindeman  
- Stephen McConnell  
- Mark Novitch  
- Henry Patterson  
- Joseph F. Quinn  
- Lisbeth Schorr  
- Lucile S. & Nathan J. Stark  

- Jean & Ned Bandler  
- John Boyd  
- William S. Custer  
- Michael E. Gluck  
- Bill Gradison  
- Janice M. Gregory  
- Jake Jones  
- John Kimpel  

Kenneth Apfel, Diana Aviv, and Robert Greenstein
The NASI Network: Individual Donors

Individual Donors (Continued)

NASI would like to recognize and thank the following individuals for their generous support of NASI's mission and programs during FY 2009 (in alphabetical order by giving level):

**Mentors ($150 and above)**

Nancy Amidei  
David Baldridge  
Merton C. Bernstein  
Joan B. Bernstein  
Christopher M. Bone  
John F. Burton  
Carolyn Clancy  
David Colby  
Sara R. Collins  
Janet Currie  
Richard E. Curtis  
Norman Daniels  
Gerben De Jong  
Patricia E. Dilley  
Melisa Favreault  
Robert B. Friedland  
Susan Grad  
Kathryn Haslanger  
Roger Hickey  
Charles A. Jeszeck  
Emily Kessler  
George Knott  
Beth Shaw Kobliner  
Warren R. Luckner  
Walter Mankoff  
Kenneth McGill  
Mary E. McKay  
David Mechanic  
Robert Reischauer  
Dallas L. Salisbury  
Robert Y. Shapiro  
Margaret C. Simms  
C. Eugene Steuerle  
Katherine Swartz  
Dale H. Yamamoto

**Friends**

Mentors ($150 and above)

<table>
<thead>
<tr>
<th>Nancy Amidei</th>
<th>Melvyn Aaronson</th>
<th>Michael R. McMullan</th>
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<td>David Baldridge</td>
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<td>John F. Burton</td>
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<td>David Colby</td>
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<td>Fay Lomax Cook</td>
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<td>Janet Currie</td>
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<td>Jane L. Ross</td>
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<td>Beatrice Disman</td>
<td>Nancy G. Shor</td>
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<td>Gary Engelhardt</td>
<td>James R. Tallon, Jr.</td>
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<td>Robert B. Friedland</td>
<td>Jennifer Erkulwater</td>
<td>Craig Thornton</td>
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<td>Lex Frieden</td>
<td>Katherine Thornton</td>
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<td>Robert Gillingham</td>
<td>Eric Toder</td>
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<td>Roger Hickey</td>
<td>Lou Glasse</td>
<td>Cori E. Uccello</td>
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<tr>
<td>Charles A. Jeszeck</td>
<td>Sam Gutterman</td>
<td>Kent Weaver</td>
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<tr>
<td>Emily Kessler</td>
<td>Shelby Hallmark</td>
<td>Gail R. Wilensky</td>
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<td>George Knott</td>
<td>Ruth S. Hanft</td>
<td>Bernard Wixon</td>
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<td>Beth Shaw Kobliner</td>
<td>Marjorie Honig</td>
<td>James A. Wooten</td>
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<td>Warren R. Luckner</td>
<td>Rodney Hood</td>
<td>Edward H. Yelin</td>
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<td>Walter Mankoff</td>
<td>Edward F. Howard</td>
<td>Howard Young</td>
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<td>Kenneth McGill</td>
<td>Morone James</td>
<td>Jennifer Zeitzer</td>
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<td>Mary E. McKay</td>
<td>Regina Jefferson</td>
<td>Ilene Zeitzer</td>
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<td>David Mechanic</td>
<td>Allen Jensen</td>
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<td>Robert Reischauer</td>
<td>Beverly Johnson</td>
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<td>Dallas L. Salisbury</td>
<td>Marjorie Kanof</td>
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<td>Robert Y. Shapiro</td>
<td>George Kaplan</td>
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<td>Margaret C. Simms</td>
<td>Judith R. Lave</td>
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<td>C. Eugene Steuerle</td>
<td>Wilhemina A. Leigh</td>
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<td>Katherine Swartz</td>
<td>Lance Liebman</td>
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<td>Dale H. Yamamoto</td>
<td>Marsha Lillie-Blanton</td>
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<td>George A. Mackenzie</td>
<td></td>
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<tr>
<td></td>
<td>Larry G. Massanari</td>
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</table>
The NASI Network: Institutional Supporters and Partners

Institutional Supporters and Partners

NASI would like to recognize the following foundations, institutions, and associations for their generous support of NASI’s mission and programs, including NASI’s annual conference and Robert B. Ball Award during FY 2009 (listed alphabetically):

- AARP
- Actuarial Foundation
- AFL-CIO
- Altman Fund
- Alzheimer’s Association
- American Academy of Actuaries
- American Board of Internal Medicine
- Amerigroup
- Aspen Institute
- California Health Care Foundation
- Centers for Medicare & Medicaid Services
- Century Foundation
- Commonwealth Fund
- ELM Income Group
- Family of Anne M. Somers
- Family of Nathan J. Stark
- Family of Eileen P. Sweeney
- Ford Foundation
- Health & Biomedical Law Concentration, Suffolk University Law School
- Teresa and John Heinz Fund of the Heinz Family Foundation
- Hubert Humphrey Institute, University of Minnesota
- Johnson & Johnson
- Joint Center for Political and Economic Studies
- Kaiser Permanente
- Metlife Foundation
- National Committee to Preserve Social Security and Medicare
- National Health Policy Group
- National Institute for Disability and Rehabilitation Research
- National Institute on Retirement Security
- Pension Rights Center
- Peter G. Petersen Foundation
- Retirement Research Foundation
- Robert Wood Johnson Foundation
- Rockefeller Foundation
- SCAN Foundation
- Schering-Plough
- Seattle Foundation
- Segal Company
- Social Security Administration
- Society of Actuaries
- Summit Health Institute for Research and Education, Inc.
- University of North Carolina
- Unum
- U.S. Department of Education
- U.S. Department of Health & Human Services
- U.S. Department of Labor

We hope you will join these organizations in supporting NASI’s programs in FY 2010:

- The Ford Foundation
- The Rockefeller Foundation
- The SCAN Foundation
The NASI Network: Ways to Support NASI

How You Can Support NASI

A donation of any size will help NASI continue its work in a forward-looking way, anticipating and responding to policy issues affecting economic risks to employers, employees and their families. With your support at one of the following giving levels, we can accomplish many things.

Visionary: $1,000+
Your contribution enables NASI to engage in strategic planning for long-term impact on public policy making and public understanding of social insurance. As a Visionary, you are invited to participate in an annual “brainstorming” meeting with NASI’s Board of Directors.

Strategist: $500+
Your contribution enables NASI to develop ideas and recommendations from Academy Members into new research and education projects that yield social insurance policy and implementation strategies for today and for the future.

Educator: $300+
Your contribution supports NASI’s ability to widely disseminate valuable research findings, policy analyses and recommendations; maintain our website and provide free access to numerous publications.

Mentor: $200+
Your contribution supports leadership development efforts, supplements honoraria/scholarships for summer interns, and helps NASI reach a new generation of leaders in the field of social insurance.

Friend: A gift of any amount is greatly appreciated and will support NASI’s mission.

Individuals can contribute online by visiting the website or by mail. For more information, please call (202) 452-8097. NASI is a nonprofit, 501(c)(3) public charity (FEID# 52-1451753) and your contribution can be claimed as a tax deduction if you itemize on your income tax return.

Membership Involvement and Volunteers

NASI cannot accomplish its mission and objectives without the dedication and commitment of our Members and volunteers. Throughout FY 2009, dozens of Members, Associates and other supporters contributed to the policy research and analyses, leadership development, communication, and fundraising activities of NASI. Members extended their expertise and knowledge (and gave much of their valuable time) by participating in study panels, serving on advisory committees, reviewing and editing briefs and reports, speaking at conferences and events, mentoring interns, and providing strategic input on organizational development goals.

Thanks to your support, NASI is able to promote understanding of how social insurance contributes to economic security and a vibrant economy. Together, we influence policymaking towards providing economic security for all Americans today -- and towards strengthening our nation’s social safety nets to protect future generations. The names of the individuals who make NASI’s work possible are recognized throughout the pages of this annual report.
Administration & Financials: Revenue Sources

FY 2009 Revenue Sources

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foundation Grants</td>
<td>$823,918</td>
<td>54%</td>
</tr>
<tr>
<td>Government Contracts</td>
<td>$290,120</td>
<td>19%</td>
</tr>
<tr>
<td>Institutional Contributions</td>
<td>$124,700</td>
<td>8%</td>
</tr>
<tr>
<td>Other Sources</td>
<td>$93,244</td>
<td>6%</td>
</tr>
<tr>
<td>Individual Contributions</td>
<td>$42,124</td>
<td>3%</td>
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<tr>
<td>Member Dues</td>
<td>$100,625</td>
<td>7%</td>
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<tr>
<td>Conference Registrations</td>
<td>$54,130</td>
<td>4%</td>
</tr>
<tr>
<td>Other Sources</td>
<td>$93,244</td>
<td>6%</td>
</tr>
</tbody>
</table>

Finances in FY 2009

During FY 2009, NASI programs were primarily supported by foundation grants, government contracts (including with the Centers for Medicare & Medicaid Services, the Social Security Administration, and the U.S. Department of Labor), and contributions from other institutions and associations. Member dues, individual donations, and conference registration fees provided NASI with critical general operating support. NASI was not immune to the economic downturn. Like other nonprofit organizations, NASI suffered from a low influx of revenues and reduced financial reserves in the form of earnings on investments. NASI made a structured effort to examine its mission and programs in strategic terms. With guidance from the Finance Committee, NASI identified ways to develop and diversify revenue sources moving forward into FY 2010.

Finance Committee

Rich Hbbie, Chair, National Association of State Workforce Agencies

Donna Butts, Generations United

Ted Groom, Groom Law Group

Mark Novitch, George Washington University

Jane Ross, National Research Council of The National Academies

Marina Weiss, March of Dimes Birth Defects Foundation
Organizational Efficiency in FY 2009

During FY 2009, approximately 74% of NASI's total budget was spent directly on program activities (Policy Research & Education, the Annual Conference, and Leadership Development) and membership services. Administration and fundraising expenses totaled approximately 26% of the total budget. With new organizational benchmarks and assessment tools, NASI will continue to improve its operational efficiency.

Strategic Goal 5

Increase funding to support the mission and vision of NASI.

2009 Audit Committee

Christine Baker, Chair, California Commission on Health and Safety and Workers’ Compensation

Jill Quadagno, Florida State University

Lawrence Thompson, The Urban Institute
The Staff of the National Academy of Social Insurance

Jill Braunstein is the Director of Communications at NASI. She oversees the implementation of media outreach and visibility strategies for the Academy and manages its website. Prior to joining NASI, Braunstein was Associate Executive Director and Director of Communications at the Institute for Women's Policy Research. Braunstein has a B.A. in Journalism and an M.A. in Public Policy with a concentration in Women's Studies, both from the George Washington University.

Yolanda Hampton started in December 2008 as NASI's Finance Manager. Hampton maintains NASI's accounting system and is responsible for keeping records and providing financial information to the management. In addition, she assists in other finance related areas, such as preparation of budgets, payroll, and employee benefits.

Deric Joyner is the Project Associate at NASI. Joyner leads and assists in the planning and execution of NASI events, including study panels and the annual conference. He also conducts outreach for NASI's internship programs and assists with all aspects of NASI communications. Prior to joining NASI, Joyner was Project Associate with Communities for Quality Education, where he supported their communications team in the planning and implementation of integrated media campaigns. Joyner received his B.A. in Political Science from Morehouse College.

Elizabeth Lamme is the Income Security Policy Assistant at NASI. Prior to joining NASI, she worked on policy issues affecting women at the Older Woman's League and the Women's Research and Education Institute, organized for Hillary Clinton's presidential campaign, and provided direct services to survivors of domestic violence. Lamme earned her B.A. in Psychology from the State University of New York at Geneseo. She is in the process of completing an M.A. in Government from Johns Hopkins University.

Pamela J. Larson has directed the National Academy of Social Insurance since 1987. First as Executive Director, then as Executive Vice President, she continues to work closely with the Academy’s Members, Board, and staff to implement its programs on leadership development, public understanding, and policy education as well as develop its services to social insurance professionals and its fund-raising initiatives. Before coming to the Academy, she was Director of Membership Services for the National Association of Area Agencies on Aging. Prior to that she served as Director of Long-Term Care Services, Southwestern Pennsylvania Area Agency on Aging, and as a Health Services Specialist for the United Mine Workers of America Health and Retirement Funds. A member of NASI since 1993, Larson received her masters of regional planning from Cornell University.

Joni Lavery is the Senior Policy Associate for Income Security at NASI. Lavery has co-authored several NASI briefs and reports, including the report, *Uncharted Waters: Paying Benefits from Individual Accounts in Federal Retirement Policy*. She also manages NASI’s Social Security policy education activities, and she has directed several NASI conferences. Prior to joining NASI, Lavery was a Presidential Management Fellow, based in the Social Security Administration’s Office of Retirement Policy, where she was a social science research analyst and examined implementation issues in Social Security reform. Lavery earned her Masters degree in Social Work from the George Warren Brown School of Social Work at Washington University in St. Louis, where she focused her academic work on income security and social policies affecting older adults. Lavery left the NASI staff in October 2009 to work at the Social Security Administration.
The Staff of the National Academy of Social Insurance (Continued)

Crystal Nelson is Executive Assistant at NASI and has been a staff member for over two years. Nelson wears many hats at NASI, including staffing the Membership Committee and managing the membership database. She is currently a Nursing major at Frederick Community College.

Kristine Quinio is the Development & Membership Associate at NASI. Quinio works closely with the EVP and other staff members to implement strategic fundraising initiatives. Prior to joining NASI, she provided management and development services to nonprofit clients as an Associate Director at Orr Associates, Inc. (OAI). She has also provided strategic communications services to Fortune 500 companies while at APCO Worldwide. Quinio has a B.A. in Political Science from the University of Southern California and an M.A. in Communication, Culture & Technology (CCT) from Georgetown University. She was a Washington Intern at NASI in 2005.

Virginia Reno is Vice President for Income Security at NASI, where she plans and directs the Academy’s work on retirement income, workers’ compensation, disability insurance and related programs. She led the Academy’s 2005 study, Uncharted Waters: Paying Benefits from Individual Accounts in Federal Retirement Policy, and prior NASI studies of the economics of privatizing Social Security and of ways to strengthen the Social Security disability programs to promote rehabilitation and work. Before coming to the Academy, Reno held research and policy positions at the U.S. Social Security Administration (SSA). She was staff director of the Policy Council that advised the Commissioner of Social Security on legislative, regulatory and administrative issues and directed the program analysis staff in SSA’s office of research and statistics. A founding member of NASI, Reno served in the U.S. Peace Corps in West Africa and received her B.A. from the Honors College of the University of Oregon.

Bob Rosenblatt is a Senior Fellow at NASI and a free-lance writer and editor. He worked with NASI staff to create the Social Insurance Sourcebook for NASI’s website. He writes weekly postings on long-term services and supports for The SCAN Foundation’s website “Research and Policy Library.” Rosenblatt was a Washington correspondent for the Los Angeles Times from 1975-2002. He covered economic and financial stories, health policy, and created the paper’s beat dealing with aging and retirement issues. Rosenblatt was also co-chair of the Editorial Board of Aging Today, the publication of the American Society on Aging, and writes a column, “Potomac Sources.” Rosenblatt has a B.A. in economics from the City College of New York and an M.A. in journalism from the Columbia University Graduate School of Journalism.

Ishita Sengupta is the Workers’ Compensation Research Associate at NASI. She co-authors the annual workers’ compensation reports of NASI, which provides the only comprehensive national data of workers’ compensation payments—cash and medical—and federal program providing workers’ compensation. Sengupta has a Ph.D. in Economics from the University of Connecticut.
Bob Zachariasiewicz and grandkids