



NATIONAL

ACADEMY

OF • SOCIAL

INSURANCE

Annual Report 2010
July 2009 - June 2010

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Learn more about social insurance: Most NASI publications, conference proceedings, and other resources are available for download through NASI's website.

You can also:

Watch videos on YouTube:
<http://www.youtube.com/user/NASIchannel>

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Welcome

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With the U.S. economy continuing its slow recovery, our key social insurance programs – unemployment insurance, Social Security, and Medicare – have been critically important sources of support for millions of American families. Even after our lawmakers passed the most far-reaching health reform law in U.S. history, uncertainty still surrounds implementation of the law and enjoyment of enhanced health security.

Within this policy environment, NASI’s mission to promote understanding of how social insurance contributes to economic security and a vibrant economy – ever germane – has become even more vital to policymaking and implementation. We are proud to lead NASI’s Board of Directors as we work diligently to provide national and state policy leaders, as well as day-to-day implementers, with the tools to make better decisions and ease the challenges of implementation.

As we look ahead to 2011 and beyond, challenges that have remained just below the surface for a number of years are surfacing rapidly. Tax, spending and economic policies have contributed to a growing deficit. Members of the President’s National Commission on Fiscal Responsibility and Reform are working on the not insurmountable challenge of maintaining the solvency of various social insurance programs – programs that sustain basic quality of life in the midst of economic insecurity – while meeting the demand to streamline annual expenditures in the federal budget in the hopes of achieving long-term fiscal sustainability.

Leaders from all levels of government, as well as educators, advocates, grant-makers, benefit providers, and administrators, can rely on NASI for timely and classic resources including: new briefs on Social Security adequacy and solvency; reports on workers’ compensation and unemployment insurance trends; basic primers on the various programs that comprise the U.S. social insurance system; and over 800 members of NASI who lead, design, research and maintain social insurance programs across the U.S. in the face of the Great Recession.

NASI will turn 25 in 2011. As you read the many highlights in this annual report from NASI’s activities during this past fiscal year, we hope you will look forward to helping us commemorate 25 years of convening experts, educating policymakers and the public, and recognizing and supporting the work of remarkable individuals who have dedicated their professional lives to strengthening social insurance programs that benefit all Americans.

Lastly, we congratulate former NASI Chair, President, and Robert M. Ball Award winner, Peter Diamond, for his important work for which he has been awarded the 2010 Nobel Prize in Economics!

Kenneth S. Apfel
Board Chair
July 2008 - June 2010

Lisa Mensah
Chair-elect



Thank you for taking the time to learn more about NASI's accomplishments during this past year.

A confluence of factors – including the lingering effects of the Great Recession, a federal deficit projected to grow to unsustainable levels, budget crunches in many states, new policy agendas established by the Obama Administration, and the enactment of the historic health care reform bill and other major pieces of legislation – resulted in new initiatives by NASI as well as an increased demand for the organization's expertise in social insurance.

Every day, the more than 800 distinguished members of the Academy make an impact – whether in the public policy sphere, the academic sphere, the business sphere, the non-governmental organization (NGO) sphere, or in a cross-section of these areas. NASI members testify before congressional committees; are cited or appear in numerous media outlets because of their expertise on a specific issue; provide counsel and strategic guidance; and run government agencies, NGOs, or companies. NASI members are providing leadership through these tough economic times as public servants in the Obama Administration (see page 38).

One public servant and scholar deserves special mention. I would like to thank Ken Apfel for his strong and steadfast leadership as NASI's Board Chair from July 2008 through June 2010. During Ken's tenure as Chair of the Board, NASI overcame financial challenges and adapted to an increasingly competitive funding environment. Fortunately, NASI can continue to benefit from Ken's wise counsel as he continues to serve on the Board of Directors.

After reviewing this report, I hope you'll continue to stay engaged and committed to supporting NASI's mission – by visiting NASI's website, subscribing to receive email updates, attending NASI briefings and the 2011 Conference, and by sharing your own research findings and ideas for challenges NASI could address.

I'm always happy to discuss NASI's activities and how we can use our resources and work together to promote shared interests. I can be reached at janice_gregory@nasi.org or by calling the NASI office at (202) 452-8097.

Janice Gregory
President

Board of Directors

FY 2010

Kenneth S. Apfel, *Chair*
University of Maryland**Lisa Mensah**, *Chair-Elect*
Aspen Institute**Janice M. Gregory**, *President*
NASI**Jacob Hacker**, *Vice President*
Yale University**Jennie Chin Hansen**, *Secretary*
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Social Security Works**Christine Baker**
California Commission on Health and Safety
and Workers' Compensation**Kathleen A. Buto****
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Daniels & Associates**Judy Feder**
Georgetown University**Michael Graetz**
Columbia Law School**William Hoagland***
CIGNA**Christopher O'Flinn***
Elm Income Group**Jill Quadagno**
Florida State University**Joseph Quinn****
Boston College**Jane Ross***
National Research Council of
The National Academies**Gerald Shea**
AFL-CIO**William E. Spriggs*****
Howard University**Lawrence H. Thompson****
Urban Institute

*Term began 5/1/10 **Term ended 4/30/10 ***Term ended 12/31/09

About NASI

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.

Key Policy Areas

Social Security

Medicare & Health Policy

Workers' Compensation

Disability Insurance

Long-Term Care

Unemployment Insurance

Workforce Issues and Employee Benefits

Poverty & Income Assistance

Highlights of NASI's Activities in FY 2010

In response to economic, political, and social developments, a significant portion of NASI's activities in FY 2010 focused on increasing the public's and policymakers' understanding of Social Security. NASI has identified 30 options for putting the Social Security program's finances into 75-year balance and more than 10 ways to make Social Security benefits more adequate for those most reliant on the benefits.

As you'll read in the various sections of this report, NASI's approach to increasing understanding of Social Security (and of other social insurance programs) among key audiences involves a variety of integrated activities – from producing research-based publications to convening stakeholders (through our annual conference, which drew more than 350 attendees, and through smaller roundtables and seminars) to recognizing and supporting the work of NASI members.

In addition to a focus on Social Security, NASI continues to conduct research into other areas of social insurance, including unemployment insurance, workers' compensation, disability insurance, health coverage, and long-term care. In FY 2010, NASI held convenings or developed information products in each of these areas – all designed to help lawmakers, administrators of social insurance programs, researchers, and educators tackle challenges and improve outcomes.

Janice Gregory became the tenth President of NASI on July 1, 2009. Gregory took over from **Margaret Simms**, who had served as President since 2007. **Kenneth Apfel** continued to serve as Board Chair through June (when **Lisa Mensah** took the reins). NASI improved its operational efficiency, with 83% of the total budget in FY 2010 being spent on programming activities, compared with 74% in FY 2009 (see page 49).



Paul Van de Water from the Center on Budget and Policy Priorities presenting during Session III (“What role does Social Security’s adequacy and solvency play?”) of the 2010 Conference. Bill Arnone moderated the session. Other panelists were Nancy Altman, Daniel Franklin, David John, and Maya Rockeymoore. (See page 24 for more on the 2010 Conference.)



Policy Research, Education & Communications NASI leverages a national network of experts



Participants in NASI’s “Strengthening Unemployment Insurance for the 21st Century” roundtable in July 2010. (See page 19 for more.)

The recession has changed the way Americans think about their future and underscores the critical need for strong social insurance programs.

Despite the importance of social insurance in the United States, few people know the programs well. NASI was established in 1986 as an independent, nonpartisan and nongovernment organization to promote informed discussion and debate on social insurance issues and to stimulate fresh thinking.

Today, NASI has over 800 members who work at universities, government agencies,

congressional offices, corporations, nonprofits, advocacy organizations, and law firms. NASI members possess expertise in a wide range of areas including economics, law, political science, public policy, business administration, medicine, and public health policy. Members drive NASI's mission to promote understanding of how social insurance contributes to economic security and a vibrant economy.

Income Security Standing Committee

Joseph F. Quinn, Chair*
Boston College

Michael Graetz, Chair**
Columbia Law School

Nancy J. Altman
Social Security Works

Donna M. Butts
Generations United

Richard A. Hobbie
National Association of
State Workforce Agencies

Joan A. Kuriansky
Wider Opportunities for Women

*Term ended 4/30/10

**Term began 5/1/10

Health Policy Standing Committee

Jacob Hacker, Chair
Yale University

Kathy Buto
Johnson & Johnson

Judy Feder
Center for American Progress

Jonathan Gruber
Massachusetts Institute of Technology

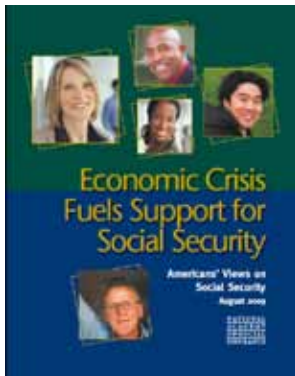
Jennie Chin Hansen
American Geriatrics Society

Jay Himmelstein
University of Massachusetts
Medical School

Jon Oberlander
University of North Carolina
Chapel Hill

Paul Van de Water
Center on Budget and Policy Priorities

Americans are willing to pay higher taxes to ensure Social Security benefits.



In July 2009, NASI and the Rockefeller Foundation conducted a public opinion poll and found that 77 percent of Americans – including 87 percent of

Democrats, 75 percent of independents and 67 percent of Republicans – agree it is critical to preserve Social Security for future generations, even if it means increasing working Americans' contributions to the program. NASI's report (released in August 2009) details the poll findings.

Americans are willing to pay for Social Security because they value it for themselves (72%), for their families (75%), and for the security and stability it provides to millions of retired Americans, disabled individuals, and children and widowed spouses of deceased workers (87%). Furthermore, an overwhelming number of Americans – 90 percent – want Congress to act within the next two years to preserve Social Security.

Americans are willing to pay for Social Security because they value it for themselves, for their families, and for the security and stability it provides to millions of retired Americans, disabled individuals, and children and widowed spouses of deceased workers.



NASI's follow-up report, issued in October 2009, includes 30 options for putting the Social Security program's finances into 75-year balance and

more than 10 ways to make Social Security benefits more adequate for those most reliant on the benefits.

Large majorities of Americans support strengthening benefits for those who need them most:

- 78% support extending benefits to children under age 22 of deceased or disabled parents while attending college or vocational school;
- 76% support increasing benefits for widowed spouses of low-earning couples;
- 75% support increasing benefit for people over the age of 85;
- 69% support improving benefits for steady, low-paid workers at retirement;
- 64% support improving benefits for working parents who take time off to care for children.

Americans of all colors firmly believe in Social Security’s value to society and want government leaders to take action to keep the program vibrant for future generations.



Anxious about their economic security and prospects for retirement, large majorities of Americans (88%) say that Social Security is more important

than ever. Although Social Security enjoys support from a majority of Americans, African Americans and Hispanics (91%) are more likely than whites (77%) to say that we have an obligation to provide a secure retirement for all working Americans.

When given a choice between cutting taxes and government spending or strengthening Social Security in response to the economic crisis and large deficit, two in three Americans (66%) – including 73 percent of African Americans, 67 percent of Hispanics, and 66 percent of whites – support strengthening Social Security over cutting its benefits.

NASI member **Maya Rockey Moore**, CEO of Global Policy Solutions, co-authored *Tough Times Require Strong Social Security Benefits* with **Melissa Maitin-Shepard**.

NASI’s ongoing education and dissemination efforts ensure that key audiences, especially policymakers, have the necessary information and knowledge to respond to the needs of Americans.

Two in three Americans support strengthening Social Security over cutting its benefits.

At a Social Security briefing on Capitol Hill that took place in October 2009, expert panelists imparted key points:

“The conclusion has been that we can’t afford [Social Security]...We really cannot afford to go forward with those conclusions as a base. We must open the debate up and take the kind of fresh look that will help us reshape our retirement income framework to do a better job overall.”

Janice M. Gregory
President, NASI

“Social Security should continue to evolve, as it has in the past. We certainly need to find solutions to deal with the solvency challenge that we face, but we also need to find solutions that ensure that Social Security’s essential framework stays strong and provides basic adequacy of benefits, particularly for our most vulnerable populations.”

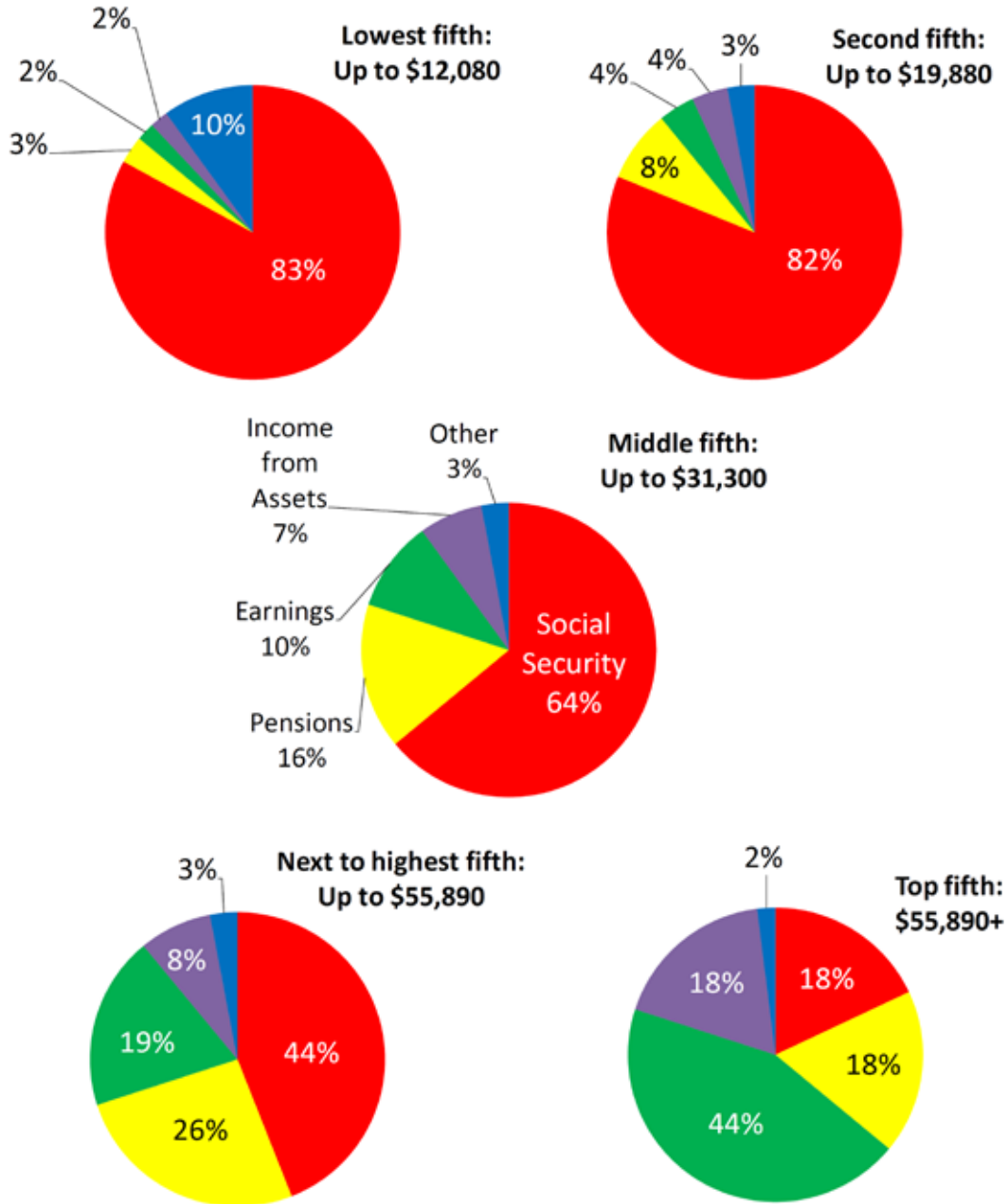
Kenneth Apfel
Former Commissioner of the Social Security Administration

“What we’re seeing overall—and this is true across many issues—is that the conventional wisdom among Washington elites does not match the attitudes of the public...On the whole, Americans are deeply supportive of the program and want Congress to take steps to strengthen it.”

Danny Franklin
Benenson Strategy Group

Americans across the income spectrum
depend on Social Security.

Shares of Income from Specified Sources by Income Level, 2008
Married Couples and Unmarried Persons Age 65 and Older



Source: Social Security Administration: *Income of the Population 55 and Over, 2008*

The President's National Commission on Fiscal Responsibility and Reform

President Obama formed a National Commission on Fiscal Responsibility and Reform in February 2010, with the goal of “identifying policies to improve the fiscal situation [of the United States] in the medium term and to achieve fiscal sustainability over the long run.”

Medicare and Medicaid, not Social Security, contribute to long-term federal deficits, explained **Jim Horney** from the Center on Budget and Policy Priorities at NASI's December 2009 briefing on “Demystifying the Deficit, Social Security Finances, & Commissions.” **Nancy Altman**, former Executive Assistant to Alan Greenspan while he chaired the bipartisan commission that developed the 1983 Social Security amendments, asserted that “Social Security's income and assets should never be part of a broad deficit-reduction effort. Diverting these funds from their intended purpose is legally and morally wrong.” **Ashley Carson**, then Executive Director of OWL-The Voice of Midlife and Older Women, urged the Capitol Hill audience to think about the real people, the widows, children, and older men and women who rely on this income to pay for their most basic needs.

NASI President **Janice Gregory** and staff members **Tom Bethell** and **Virginia Reno** each

At the conclusion of NASI's “Demystifying the Deficit” briefing, Ashley Carson explains to an audience member how Americans across the income spectrum depend on Social Security (see page 10).

Social Security is the mainstay of retirement security for the American middle class, not just the poor.

provided testimony for the Fiscal Commission on June 30. Gregory addressed the importance of understanding how Social Security's dedicated revenues are distinct from the rest of the budget – both legally and politically. Bethell recalled Robert M. Ball's insights about the moral imperative, in light of the benefit cuts already enacted in 1983, to close the remaining financing gap without

further reducing benefits. Reno emphasized the importance of benefits to recipients and how Social Security is the mainstay of retirement security for the American middle class, not just the poor.

Reno's findings about how Social Security lifts elders and children out of poverty were later cited in remarks on the Senate floor by **Senator Max Baucus**, Chairman of the Finance Committee and member of the Fiscal Commission.

In addition, Gregory, Reno, and NASI Chair **Lisa Mensah** briefed some individual Fiscal Commission members, as well as the professional staff of the full commission and of many individual members, to share NASI's

research findings on Social Security. In July, Reno presented invited testimony to the Social Security Subcommittee of the House Committee on Ways and Means to share findings on the importance of Social Security for all Americans on its 75th anniversary, and options to ensure the program will remain strong over the next 75 years.



Addressing Benefit Adequacy as Part of Social Security Solvency

Social Security policy is an important tool for improving the adequacy of income for low-income groups. NASI organized a seminar on “Addressing Benefit Adequacy as Part of Social Security Solvency,” which took place at the Ford Foundation headquarters in New York City in February. The seminar opened with a panel on “Why Do We Care About Adequacy?” This was followed by a panel on “Gaps Today: Who Needs Help?,” which offered a fresh perspective on how Social Security can be framed as the solution to critical problems of economic insecurity for vulnerable groups. The final panel, “Engaging Communities: Building Coalitions,” addressed how messages about Social Security can reach out to and empower key constituencies who have so much at stake in the current policy debates.



Janice Nittoli, Rockefeller Foundation, and Laura Robbins, Atlantic Philanthropies, discuss how foundations can collaborate to strengthen Social Security.

Seminar participants (in alphabetical order):

Henry Aaron, The Brookings Institution
Nancy Altman, Social Security Works
William Arnone, Consultant
Dean Baker, Center for Economic Policy Research
Margot Brandenburg, Rockefeller Foundation
Christopher Breiseth, Frances Perkins Center
Donna Butts, Generations United
Sarah Byrne, Alliance for Retired Americans
Ashley Carson, Older Women’s League
Susan Daniels, Daniels and Associates
Lisa Davis, AARP
Frank DeGiovanni, Ford Foundation
Hilary Doe, Roosevelt Institute Campus Network
Lily Dorment, Rockefeller Foundation
Joan Entmacher, National Women’s Law Center
Pablo Farías, Ford Foundation
Melissa Favreault, Urban Institute
Marty Ford, The Arc and UCP Public Policy Collaboration
Brinda Ganguly, Rockefeller Foundation
Teresa Ghilarducci, The New School for Social Research
Michael Graetz, Columbia Law School
Robert Greenstein, Center on Budget & Policy Priorities
Janice Gregory, NASI
Karyne Jones, National Caucus and Center on Black Aged
Avis Jones-DeWeever, National Council of Negro Women
Donald Jordan, Atlantic Philanthropies
Kilolo Kijakazi, Ford Foundation
Hemi Kim, National Korean American Service & Education Consortium
Sharon King, Atlantic Philanthropies
Eric Kingson, Syracuse University
Joan Kuriansky, Wider Opportunities for Women
Pamela Larson, NASI
Wilhelmina Leigh, Joint Center for Political and Economic Studies
Melissa Maitin-Shepard, Global Policy Solutions
Lisa Mensah, Aspen Institute
Leticia Miranda, National Council of La Raza
Janice Nittoli, Rockefeller Foundation
Katheryn Olson, House Committee on Ways and Means
Virginia Reno, NASI
Laura Robbins, Atlantic Philanthropies
Barbara Robles, Federal Reserve System
William Rodgers, III, Rutgers University
Eric Rodriguez, National Council of La Raza
Bob Rosenblatt, NASI
Margaret Simms, Urban Institute
William Spriggs, U.S. Department of Labor
Doua Thor, Southeast Asia Resource Action Center
Alice Wade, Social Security Administration
Christian Weller, Center for American Progress
Debra Whitman, U.S. Senate Special Committee on Aging

It is more important than ever – in light of job losses, declining asset values, and rising out-of-pocket medical costs – that groups most reliant on Social Security have their voices heard in policy debates about its future.

To strengthen the adequacy of Social Security for vulnerable groups, including communities of color, women, people with disabilities, low-wage workers and children, NASI is partnering with grassroots groups to support constituency building, education outside of the beltway, and the development of user-friendly, research-

based information. In March 2010, NASI awarded a first round of contracts to nine organizations to develop targeted educational materials and conduct outreach to their communities.

The nine awardees are:

Center for Economic and Policy Research
“The Need for Social Security by Location and Demographic Group”

Economic Policy Institute
“Our Shared Future: A Youth Movement to Strengthen Social Security”

Frances Perkins Center
“Celebrating Social Security—in Our Own Words!”

Generations United
“The Stake of Children, Youth and Grandfamilies in Social Security”

Global Policy Solutions
“A Social Security Web Campaign: Sharing Ideas and Information to Empower Communities”

National Council of Negro Women
“African-American Women and the Future of Social Security: Increasing Knowledge, Framing the Discussion”

National Council of La Raza
“Engaging Second-Generation Young Latinos as Advocates for Social Security”

OWL – The Voice of Midlife and Older Women
“Social Security Matters”

Roosevelt Institute Campus Network
“Think 2040: Social Security”



Winner of Generations United's 2010 Intergenerational Photography Contest. For more information, visit: www.gu.org.

Social Security at 75: The Legacy and Vision

Social Security helped pave a humane path out of the Great Depression in 1935 as part of President Franklin D. Roosevelt's broad agenda to lift the poor and foster the growth of a strong middle class. Seventy-five years later, as America struggles through the Great Recession, pundits question whether we can still afford Social Security's promise to empower the vulnerable and sustain a vibrant middle class for tomorrow's working families.

In collaboration with the Insight Center for Community Economic Development - Closing the Racial Wealth Gap Initiative, NASI held a day-long forum on June 22, 2010, to mark the 75th anniversary of Social Security (August 14, 2010). The forum celebrated historical achievements and explored questions for the future, such as: How do wealth-building policies and social insurance fit together? What new developments call for new directions in Social Security?

The event was chaired by **Lisa Mensah**, NASI Board Chair and Executive Director of the Initiative on Financial Security of the Aspen Institute. **Peter Orszag**, former Director of

the Office of Management and Budget, said he was there "to celebrate 75 years of what may be the most significant, effective, and

game changing social program ever signed into law in the United States."

Other speakers at the forum (in alphabetical order):

Nancy Altman, Social Security Works

William Arnone, Consultant

Dean Baker, Center for Economic and Policy Research

Congressman Xavier Becerra, California 31st District

Donna Butts,

Generations United

Ashley Carson, Older Women's League

Hilary Doe, Roosevelt Institute Campus Network

Janice Ferebee, National Council of Negro Women's Bethune Program Development Center

Michael Graetz, Columbia Law School

Janice Gregory, NASI

Alexander Hertel-Fernandez, Economic

Policy Institute

Douglas Holtz-Eakin, American Action Forum

Kilolo Kijakazi, Ford Foundation

Lori Montgomery, *Washington Post*

Jill Quadagno, Florida State University

William Rodgers, III, Rutgers University

Eric Rodriguez, National Council of La Raza

John Rother, AARP

David Wessel, *Wall Street Journal*



Kilolo Kijakazi discussed the importance of Social Security to the economic security of workers and their families at NASI's *Social Security at 75* forum.



Event Chair Lisa Mensah introduces luncheon keynote speaker Peter Orszag.

Social Security at 75: A Cornerstone of America's Future

NASI commemorated Social Security's anniversary by producing an educational video, *Social Security at 75: A Cornerstone of America's Future*, which is available for general public viewing via the NASI website.

Since the first benefit was paid 70 years ago -- and through many economic ups and downs -- the Social Security program has never missed a payment. Today, the Social Security program continues to provide an economic lifeline for millions of people.

As former OMB Director **Peter Orszag** notes:

"75 years ago, the elderly poverty rate was estimated to be over 50%. Today it stands at just under 10%. If, however, you were to take Social Security from the elderly, that number would be 45% today. It lifted 13 million Americans over the poverty line."



President Franklin D. Roosevelt, who signed the Social Security Act into law, August 14, 1935.

Social Security... "lifted 13 million Americans over the poverty line."

The *Social Security at 75: A Cornerstone of America's Future* video features:

Nancy Altman, Social Security Works

Congressman Xavier Becerra, U.S. Congress, California 31st Congressional District

Ashley Carson, Older Women's League

Hilary Doe, Roosevelt Institute Campus Network

Joan Entmacher, National Women's Law Center

Janice Gregory, NASI

Alex Hertel-Fernandez, Economic Policy Institute

Avis Jones-DeWeever, National Council of Negro Women, Inc.

Kilolo Kijakazi, Ford Foundation

Virginia Reno, NASI

Peter Orszag, Office of Management and Budget

Video highlights:

"Social Security is the largest financial asset that low-income households have and it is an important asset for most households regardless of income level."

-- **Kilolo Kijakazi**

"Women receive a higher percentage of their income from Social Security than men do. For nearly half of single elderly women, Social Security is virtually their only source of income."

-- **Joan Entmacher**

Congressman Xavier Becerra observed that "Social Security is the most successful program – private or public – that the United States of America has ever established to help its people."

Providing the Public and Policymakers with Research-Based Resources about Social Security

In January 2010, NASI released a brief, *When to Take Social Security: Questions to Consider*, to help Americans with one of the most important financial decisions they will make during their lifetime. The release of the brief was accompanied by a roundtable event, moderated by **Anna Rappaport**, past president of the Society of Actuaries. The three panelists -- **Sarah**

Holden, Investors Company Institute, **James Mahaney**, Prudential, and **Virginia Reno**, NASI -- discussed what one should consider in deciding when to take Social Security, the potential risks or benefits of waiting to claim benefits, and options if one needs to take benefits early. The *Wall Street Journal* included this consumer-friendly brief in its list of "The Best Resources for Later Life."



The Best In... MONEY

Social Security: The National Academy of Social Insurance has published "When to Take Social Security Benefits: Questions to Consider," which uses a question-and-answer format to guide you through key issues. ~ **February 20, 2010**

While Social Security is best known as the foundation of retirement security for older Americans, the program has provided economic security to families that lose a breadwinner's support because of death or disability. Between 1965 and 1983, Social Security provided benefits for young adult children who were enrolled in post-secondary education until age 22. Today, Social Security provides benefits directly to about 3 million dependents under age 18 (or under age 19 if still in high school) who have lost parental support because of death, disability, or retirement.

NASI's brief, *A New Deal for Young Adults*, examines the case for reinstating Social Security student benefits until age 22 for children of deceased and disabled workers. A briefing on Capitol Hill in May 2010 featured the author of the brief, **Alex Hertel-Fernandez** (Economic Policy Institute), as well as **Hilary Doe** (Roosevelt Institute Campus Network) and **Wilhelmina Leigh** (Joint Center for Political and Economic Studies), with **Janice Gregory** (NASI) serving as moderator.

The Hill, a congressional paper that publishes daily when Congress is in session, highlighted this brief.



Restoring the Social Security student benefit: The best policy idea you haven't heard of yet

According to an excellent new policy brief by Alexander Hertel-Fernandez and the National Academy of Social Insurance, a number of factors make the student benefit even more important for children than it was in 1983. ~ **April 18, 2010**

More Snapshots from the Media
on NASI Findings on Social Security,
Health Care Reform, and Workers' Compensation

POLITICO

New poll shows preference for raising taxes to preserve Soc Security...

A strong majority of Americans support levying higher taxes if that ensures the preservation of Social Security, according to a nationwide poll conducted last month.
~ August 13, 2009

U.S. News & World Report

Although this prognosis may appear alarming, Virginia Reno of the nonpartisan National Academy of Social Insurance insists that Social Security's books aren't cause for panic. "There absolutely is no crisis," she says. "There is a shortfall in the long-term finances." For a genuine Social Security crisis, Reno points to 1983, when the system's finances were so depleted that benefits would have had to have been reduced or delayed within months had Congress not acted. ~ October 8, 2009

THE HUFFINGTON POST

Now a new report released by the National Academy of Social Insurance ... finds that in light of the poor economy and recent stock market losses, a vast majority (88%) of Americans--95 percent of African Americans, 89 percent of Hispanics and 87 percent of whites--agree that Social Security benefits are more important than ever to ensure that people have a dependable income when they retire.
~ February 23, 2010

GOVERNMENT EXECUTIVE .COM

"There's support for that approach in an extensive [study of the administrative aspects of health reform](#) conducted by the National Academy of Public Administration and the National Academy of Social Insurance last summer. Panelists found that emphasis should be on encouraging compliance rather than on penalizing noncompliance, and that penalties should be both moderate and collectable." ~ April 9, 2010

CLAIMS JOURNAL.COM

A PRODUCT OF INSURANCE JOURNAL

Total U.S. Workers' Compensation Payments to Injured Workers Slow

U.S. workers' compensation payments for medical care and cash benefits for workers injured on the job increased 2.0 percent to \$55.4 billion in 2007. According to a study by the National Academy of Social Insurance (NASI), the modest growth in national spending in 2007 reflects large declines in California cash benefit payments that followed reforms enacted in 2003 and 2004. ~ August 26, 2009

Engaging and Educating Key Audiences in New Ways

NASI uses Twitter as a real-time information network to help us monitor the latest developments related to the field of social insurance. Twitter is also a tool that helps NASI reach and interact with a wider audience -- from other organizations to individual experts and "Followers" interested in learning more about social insurance.



iOme Challenge winning team with Senator Carl Levin.

The iOme Challenge is a national competition that engages members of the "Millennial Generation" to think about their own future -- 40 years down the road. For the 2009 competition, student teams from colleges across the country were asked to write comprehensive plans to ensure a dignified retirement for members of their generation and beyond. The winning team from Western Michigan University developed their plan using NASI's report, *Fixing Social Security: Adequate Benefits, Adequate Financing*.

How can we improve the U.S. unemployment insurance system to meet the needs of a 21st century workforce?

To begin to find the answers to this over-arching question, NASI held a national roundtable discussion in July 2010. The day-long event produced a synthesis of our current knowledge, a proposed research agenda, and new ideas and approaches for strengthening unemployment insurance for the 21st century.

Panel topics included:

- Unemployment Insurance Administration
- Views of Stakeholders: Employees and Employers
- Eligibility Requirements and Benefit Adequacy
- The Unemployment Insurance Payroll Tax: Forward Funding and Experience Rating
- Solvency of Unemployment Insurance
- Getting Workers Back to Work
- Proposals for Sweeping Reform



(Left to right): Roundtable participants Till von Wachter, Bill Warren, Richard Hobbie and event chair, Margaret Simms.

The roundtable, chaired by **Margaret Simms**, featured the following speakers:

Patricia Anderson, Dartmouth University

Charles Betsey, Howard University

Gary Burtless, The Brookings Institution

Dan Black, University of Chicago

Roberta Gassman, Wisconsin

Department of Workforce Development

Gay Gilbert, U.S. Department of Labor

Erica Groshen, Federal Reserve Bank of New York

Richard Hobbie, National Association of State Workforce Agencies

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

Jane Oates, U.S. Department of Labor

Christopher O'Leary W.E. Upjohn Institute for Employment Research

Joseph Quinn, Boston College

Luke Shaefer, University of Michigan

Andrew Stettner, National Employment Law Project

Larry Temple, Texas Workforce Commission

Wayne Vroman, The Urban Institute

Bill Warren, Direct Employers Association

Till von Wachter, Columbia University

Rochelle Webb, Arizona Department of Economic Security

Stephen Woodbury, W.E. Upjohn Institute for Employment Research

NASI provides ongoing assistance to workers' compensation policymakers and administrators at the state and federal levels.



Administrators and policymakers at the state and national level rely on NASI's annual report, *Workers Compensation: Benefits, Coverage, and Costs*.

The August 2009 report found that a drop in California's workers' compensation spending slowed growth in national spending in 2007.

All state agencies receive a copy of NASI's *Workers' Compensation* report. Many agencies use this report to benchmark their performance. They also use this data in their annual reports.

Members of the Workers' Compensation Data Panel:

John F. Burton, Jr., Chair, Rutgers University
Marjorie Baldwin, 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, Centers for Medicare and Medicaid Services
James N. Ellenberger, Virginia Employment Commission
Shelby Hallmark, U.S. Department of Labor
Jay S. Himmelstein, 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
Robert Reville, RAND
John Ruser, U.S. Bureau of Labor Statistics
Emily A. Spieler, Northeastern University School of Law
Robert Stegert, Marriott International, Inc.
Alex Swedlow, California Workers' Compensation Institute
Richard A. Victor, Workers' Compensation Research Institute
Alex Wasarhelyi, Social Security Administration
Benjamin Washington, Centers for Medicare and Medicaid Services
William J. Wiatrowski, U.S. Bureau of Labor Statistics

RISK & INSURANCE

National spending on comp increases but slowed by California trends...

*According to a study by the National Academy of Social Insurance, comp payments in the U.S. totaled \$55.4 billion in 2007, the most recent data available.
~ August 26, 2009*

What are the implications of developments in Workers' Compensation for Social Security Disability Insurance?

To answer this question, NASI convened a policy research seminar, *Implications of Developments in Workers' Compensation for Social Security Disability Insurance*, with the goal of promoting dialogue and understanding among experts in the nation's two largest disability income maintenance programs: Social Security disability insurance (SSDI) and workers' compensation (WC). Experts and policymakers across the country discussed new findings about the interaction of workers' compensation with other health and income security systems for ill, injured or disabled workers. Questions explored during the seminar included:

- What might account for divergent trends in claims and spending for SSDI and WC?
- By what pathways do injured workers turn to workers' comp or SSDI?
- What lessons emerge from dramatic reforms in California that reduced WC spending for permanent disability?

- How can we improve service to beneficiaries who qualify for both WC and SSDI?
- What innovations in disability management are successful in helping ill or injured workers keep their jobs and get the accommodations they need?



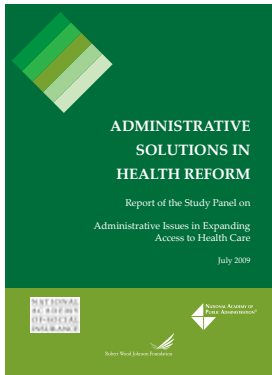
Bobby Silverstein, Seminar Co-Chair, with Virginia Reno of NASI, and Martha Lambie and Michael Wilkins, both from the Social Security Administration.

Research Seminar Co-Chairs and Speakers (in alphabetical order):

Christine Baker, *Co-Chair*, California Commission on Health and Safety and Workers' Compensation
Robert "Bobby" Silverstein, *Co-Chair*, Powers Pyles Sutter & Verville PC
Valerie Alston-Johnson, Patterson Harkavy, LLP
Valerie Altomare, Social Security Administration
Richard Balkus, Social Security Administration
Leslie Boden, Boston University
Terrence Bogyo, Workers' Compensation Board of British Columbia
John F. Burton, Rutgers University
Marty Ford, The ARC of the United States
Janice Gregory, NASI
Gregory Krohm, International Association of Industrial Accident Boards and Commissions

Kevin Kulzer, Social Security Administration
Martha J. Lambie, Social Security Administration
Bryon MacDonald, World Institute on Disability
Sean McNally, Grimmway Farms
Paul O'Leary, Social Security Administration
Patricia Owens, Consultant to the Government Accountability Office
Tom Rankin, California Alliance for Retired Americans
Seth Seabury, RAND
Paul Van de Water, Center on Budget and Policy Priorities
Robert Weathers, Social Security Administration
Michael Wilkins, Social Security Administration
Ethel Zelenske, National Organization of Social Security Claimants' Representatives

Supporting the Successful Implementation of Health Reform Legislation



President Obama signed into law the Patient Protection and Affordable Care Act (PPACA) on March 23, 2010, with the goal of extending health coverage to 50.6 million uninsured Americans.

As the Obama Administration and Congress were forging this historic healthcare reform legislation, a joint study panel of NASI and the National Academy of Public Administration (NAPA) issued their final report in July 2009. An earlier volume of working papers commissioned by the study panel, "Expanding Access to Health Care: A Management Approach," was published in the spring of 2009.

The final report, *Administrative Solutions in Health Reform*, examines administrative functions central to a variety of health reform proposals and makes specific recommendations for the successful implementation of proposed health reforms. Key findings include:

- Keep eligibility rules simple to encourage participation and facilitate administration.
- Make any health insurance mandates easily enforceable.
- Ensure fairness and capacity in a restructured health insurance market.

- Choose an appropriate organizational design to administer new health care programs.
- Put mechanisms in place to support health care cost control.

Members of the NASI-NAPA 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

In FY 2011, NASI -- with the guidance of its Health Policy Standing Committee (see page 7 for list of members) -- will continue to provide resources and tools to help federal and state administrators and other stakeholders successfully implement provisions of the new law.

Heralding the Inclusion of Long-Term Services and Supports Policies as Part of Health Reform

NASI has partnered with The SCAN Foundation to develop new research and policymaking tools for long-term care. One such tool is the *Research and Policy Library on Long-Term Services and Supports (LTSS)*, which can be accessed through The SCAN Foundation website. This e-Library is a compendium of the most up-to-date information from think tanks, foundations and policy groups, Congressional hearings, blogs and others.

NASI has been monitoring passage of the CLASS Act (Community Living Assistance Services and Support Act), which is a voluntary, federally administered, consumer-financed insurance plan. The CLASS Act became law when President Obama signed the Patient Protection and Affordable Care Act (PPACA) in March 2010.

The CLASS Act represents the first significant change in the way the United States finances long-term care.

Long-term care expenses will be a burden for millions of people as members of the baby boom generation ages and many develop physical and mental problems requiring long-term services and supports.

The CLASS Act essentially creates a voluntary social insurance program for long-term care. The law also increases the availability of home- and community-based services in Medicaid, to coordinate chronic and long-term care for Medicare beneficiaries and especially for dual eligibles, and to strengthen the long-term care workforce.

NASI Senior Fellow **Bob Rosenblatt** notes that long-term care expenses will be a burden for millions of people as members of the baby boom generation age and many develop physical and mental problems requiring long-term services and supports.

The CLASS Act offers a new solution to this problem, but it remains uncertain how many people will decide to participate in this approach. In FY

2011, NASI will continue to study the implementation of policies designed to improve quality of life for persons with disabilities who are dependent on others.



RESEARCH & POLICY LIBRARY

search here. *within* all three libraries

Research & Policy Library

What lessons can we learn from the bad economy to strengthen our social insurance system?

NASI's 22nd Annual Conference, *Beyond the Bad Economy: Jobs, Retirement, Health, and Social Insurance*, examined the implications of the recession for social insurance policies in the areas of: job loss, health care coverage, retirement income, disability and work-injury benefits, and long-term care.

Over 300 conference participants had the opportunity to discuss and examine prospects for transformational change in the U.S. economy and opportunities for strengthening our social safety net. Conference participants included policy analysts, researchers, congressional staff, labor union representatives, industry leaders, students, advocates, federal employees and other individuals who want to understand and help develop solutions to the serious challenges facing our country.

Conference Co-Chairs

William J. Arnone

Retired Partner in the Employee Financial Services practice of Ernst & Young

Harriet Komisar

Senior Research Analyst
The Hilltop Institute,
University of Maryland
at Baltimore County

William Rodgers, III

Professor of Public Policy
and Chief Economist
The Heldrich Center,
Rutgers University



Iris Lav presenting on “State Budgets Under Stress: Impacts on Unemployment Insurance and Medicaid” during Session I (“What is the Impact of the Recession on Social Insurance?”) of the 2010 Conference.

*Beyond the Bad Economy:
Jobs, Retirement, Health, and Social Insurance
January 21-22, 2010*

Conference and roundtable speakers and panelists (in alphabetical order):

Nancy Altman, Social Security Works

William J. Arnone, Consultant

Michelle Bazie, Center on Budget and Policy Priorities

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

Dean Baker, Center for Economic and Policy Research

Steve Bell, Abt Associates

Deborah Chollet, Mathematica, Inc.

Laura Clawson, Working America

David Cutler, Harvard University

Bradford DeLong, University of California - Berkeley

Susan Dentzer, *Health Affairs*

Hilary Doe, Roosevelt Institute Campus Network

Peter Edelman, Georgetown Law School

Judy Feder, Center for American Progress

Daniel Franklin, Benenson Strategies Group

Richard Freeman, National Bureau of Economic Research

Constance Garner, Senate HELP Committee

Gregg Gordon, Social Science Research Network

Janice Gregory, NASI

Joseph V. Haggerty, United Way Worldwide

Jennie Chen Hansen, AARP

Richard Hobbie, National Association of State Workforce Agencies

Sarah Holden, Investment Company Institute

Andrew Hyman, Robert Wood Johnson Foundation

Lawrence R. Jacobs, University of Minnesota

David John, Heritage Foundation

Jennifer Klein, Yale University

Harriet Komisar, Hilltop Institute at the University of Maryland, Baltimore County

Iris Lav, Center on Budget and Policy Priorities

Mark Levinson, SEIU

Mark Levitan, New York City Center for Economic Opportunity

Maya MacGuineas, Committee for a Responsible Federal Budget

James Mahaney, Prudential

Lisa Mensah, The Aspen Institute

Edward Montgomery, Director of Recovery for Auto Communities and Workers

Jane Oates, U.S. Department of Labor

Steve Pearlstein, *Washington Post*

Karen Pollitz, Georgetown University

Kenneth Porter, American Benefits Council

Jill Quadagno, Florida State University

Jane Bryant Quinn, Bloomberg

Anna Rappaport, Consultant

Virginia Reno, NASI

Maya Rockeymoore, Global Policy Solutions

William Rodgers, Rutgers University

Eric Rodriguez, National Council of La Raza

Carol Regan, Paraprofessional Health Institute

Alan Rosenblatt, Center for American Progress

Bob Rosenblatt, NASI

Ree Sailors, National Governor's Association

Sonya Schwartz, National Academy of State Health Policy

Ishita Sengupta, NASI

Brian Smedley, Joint Center for Political and Economic Studies

Paul Van de Water, Center on Budget and Policy Priorities

Joshua Weiner, RTI International

NASI's 2010 conference brought together the nation's leading experts on social insurance to exchange knowledge and foster actions that will improve economic security for all Americans.



Jane Bryant Quinn giving the keynote speech at the conference dinner on January 21.



NASI members Bill Arnone (co-chair of NASI's 2010 Conference), Joan Bernstein, and Chris O'Flinn (member of NASI's Board of Directors).



NASI members Paul Fronstin, Janice Gregory (NASI President), and Howard Fluhr.



2010 Washington Interns on Social Insurance - Daniel Alvarado, AnMarie Nguyen, Ben Galick, and Anne Kelts - present their project on how to explain to teenagers and young adults why they should care about the Social Security program and how it affects them.

Leadership Development

NASI helps develop the next generation of leaders in social insurance



The 2009 cohort of NASI's summer internship programs. Interns across all four of NASI's internship programs intern for 12 weeks during the summer at various organizations working on social insurance policy in Washington, DC.

Embracing the Future

NASI's four summer internship programs,

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

offer an array of unique opportunities to undergraduate, graduate, and doctoral students who want to increase their understanding of social insurance policy or key sub-topics or to pursue a career in social insurance or related fields. Each year, NASI constitutes special selection committees (see page 37) to review applications and recommend top students for placement at various agencies and organizations throughout Washington, DC.

The 21 students in the 2010 class of interns came from colleges and universities across the nation, as well as from various fields of study including: political science, economics, social work, social policy, social relations and policy, biology, demography, public health, health sector management, health policy and administration, public policy, health policy and sociology.

“The NASI internship has been a GREAT experience and has far exceeded my expectations. It confirmed my interest in public policy and has exposed me to a breadth of knowledge in social insurance and public policy. Getting all of the “extra” NASI activities (the seminars, conferences, field trips for Somers interns, writing assignments) truly made a difference - they were an ESSENTIAL part of the entire internship experience.”

-- 2010 Somers Intern



The 2010 cohort of NASI's summer internship programs. The 2010 class consisted of 21 current students, recent graduates, doctoral students, and young professionals.

Top Students and Young Professionals

2010 Washington Interns on Social Insurance:

Daniel Alvarado, University of Southern California
Placement: National Institute on Retirement Security
Supervisor/Mentor: **Beth Almeida**

Bethany Boland, Johns Hopkins University
Placement: U.S. Government Accountability Office
Supervisor/Mentor: **Michael Collins**

Jane Farrell, Emory University
Placement: National Academy of Social Insurance
Supervisor/Mentor: **Ishita Sengupta**

Benjamin Galick, University of Minnesota
Placement: National Research Council
Supervisor/Mentor: **Jane Ross**

Julia Harris, Columbia University
Placement: AcademyHealth
Supervisor/Mentor: **Michael Gluck**

Gagan Jindal, College of William and Mary
Placement: Grantmakers in Health
Supervisor/Mentor: **Faith Mitchell**

Anne Kelts, Georgetown University
Placement: Women's Institute for a Secure Retirement
Supervisor/Mentor: **Cindy Hounsell**

Sara Kizer, Pennsylvania State University
Placement: National Academy for State Health Policy
Supervisor/Mentor: **Sonya Schwartz**

Daniel Marans, Johns Hopkins University
Placement: Social Security Works
Supervisor/Mentor: **Nancy Altman**

AnMarie Nguyen, University of Pennsylvania
Placement: National Women's Law Center
Supervisor/Mentor: **Joan Entmacher**

David Wengert, University of Pennsylvania
Placement: AFL-CIO
Supervisor/Mentor: **Gerry Shea**

Xiaoge Zhang, University of Pennsylvania
Placement: Generations United
Supervisor/Mentor: **Donna Butts**

2010 Somers Aging and Long-Term Care Research Interns:

Terrell D. Brown, Howard University
Placement: U.S. Senate Special Committee on Aging
Supervisor/Mentor: **Debra Whitman**

Elizabeth Cullar, University of Maryland
Placement: Commission on Accreditation of Rehabilitation Facilities
Supervisor/Mentor: **Susanne Matthiesen**

Laura Darlak, Ithaca College
Placement: Center for Medicare Advocacy
Supervisor/Mentor: **Alfred Chiplin**

Jessica Moss, Brandeis University
Placement: National Consumer Voice for Quality Long-Term Care
Supervisor/Mentor: **Janet Wells**

Allessia Owens, Howard University
Placement: National Academy of Social Insurance
Supervisor/Mentor: **Joanne Lynn**

Sadie Rubin, Columbia University
Placement: National Council on Aging
Supervisor/Mentor: **Ramsey Alwin**

April Wong, Columbia University
Placement: National PACE Association
Supervisor/Mentor: **Brenda Sulick**

2010 Nathan J. Stark Intern for Nonprofit Development:

Amy Baral, Boston University
Placement: National Academy of Social Insurance
Supervisor/Mentor: **Pamela Larson**

2010 Eileen Sweeney Graduate Intern in Disability Policy:

Nicole Stratchan, New York Medical College
Placement: Daniels & Associates
Supervisor/Mentor: **Susan Daniels**

Filling the Educational Gaps

Over the course of 12 weeks, participants in NASI's internship programs gain research and other professional skills, as well as policy insights through a specially designed curriculum of seminars, events, and projects tailored to increase the breadth and depth of their understanding. One recent summer intern described the value of the NASI internship experience:

"The undergraduate program I completed had several gaps in the policy curriculum. This internship program filled in those gaps and did so through a high level of professional exposure, which is often not practical in classroom setting."

-- 2010 Somers Intern

The talented students selected by NASI make a significant contribution to the work of the social insurance community by bringing energy, enthusiasm, and fresh insights to their assignments. According to one 2010 Washington Intern supervisor:

"[Our NASI Intern] infused her work with the knowledge and skills she brought with her, along with information she acquired from NASI programs and speakers."

-- 2010 Intern Supervisor
at Grantmakers in Health

Across all of its programs and activities, NASI strives to maintain a balanced approach.

"I really appreciated how diverse the different people were that we heard from. The seminars and events really meshed well, but each presented a very distinct and important perspective."

-- 2010 Washington Intern



2010 Washington Interns on Social Insurance - David Wengert, Bethany Boland, Sara Kizer, and Julia Harris - present their group project on how to educate young Latinos about the benefits of Social Security.



2010 NASI interns Jane Farrell and Amy Baral.

During bi-weekly seminars, participants in all four internship programs interacted with a variety of social insurance experts including:

John Rother, AARP

Jack Ebeler, Committee on Energy and Commerce, U.S. House of Representatives

Jodie Allen, Pew Research Center

Lynn Friss Feinberg, National Partnership for Women and Families

Gay Gilbert, U.S. Department of Labor

Melinda Beeuwkes Buntin, U.S.

Department of Health & Human Services

Demystifying Social Security: Academy for Interns



2010 Washington Intern on Social Insurance, Julia Harris, with NASI staff member Ben Veghte and Steve Goss, Chief Actuary of the Social Security Administration.

Event speakers (in alphabetical order):

Amy Baral, NASI (2010 NASI Intern)
Bethany Boland, U.S. Government Accountability Office (2010 NASI Intern)
Walt Dawson, Atlantic Philanthropies
Marc Goldwein, Committee for a Responsible Federal Budget
Stephen Goss, Social Security Administration
Julia Harris, AcademyHealth (2010 NASI Intern)
Deric Joyner, NASI
Kilolo Kijakazi, Ford Foundation
Krystal Knight, National Association of Community Health Centers (2009 NASI Intern)
Joni Lavery, Social Security Administration
Daniel Marans, Social Security Works (2010 NASI Intern)
Ethan Pollack, Economic Policy Institute
Kathy Ruffing, Center on Budget and Policy Priorities
Nicole Stratchan, Daniels & Associates (2010 NASI Intern)
Scott Szymendera, Congressional Research Service
Ben Veghte, NASI

NASI strives to equip students, interns, and young professionals with the necessary information to understand and examine Social Security from a social, political, and economic standpoint. In July, NASI held its fifth day-long educational seminar for this target group. The 2010 “Demystifying Social Security: Academy for Interns” was held at the Kaiser Family Foundation’s Barbara Jordan Conference Center in Washington, D.C and drew over 100 participants.

With students from NASI’s internship programs serving as moderators and discussion leaders, the event offered a unique opportunity for interns and students to propose and choose from an array of policy choices aiming to improve the long-term adequacy and solvency of Social Security.



Participants in the “Demystifying Social Security: Academy for Interns” event discuss how to achieve social security solvency.

Recognizing Rising Social Insurance Scholars

The John Heinz Dissertation Award recognizes and promotes outstanding research on 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 winner is selected from university students across the country by the Heinz Dissertation Award Selection Committee. The 2010 Selection Committee, chaired by

Robert Hudson (Boston University), includes

Christine Bishop (Brandeis University), **Rashi Fein** (Harvard Medical School), and **James Morone** (Brown University).

Jessie B. Ramey, winner of the 2010 John Heinz Dissertation Award, is a Visiting Scholar in Women's Studies at the University of Pittsburgh. Ramey wrote her dissertation, "A Child Care Crisis: Poor Black and White Families and Orphanages in Pittsburgh, 1878-1929" while she was a doctoral student

in History at Carnegie Mellon University. The dissertation was nominated for the award by Tera W. Hunter of Princeton University and Steve Schlossman and Lisa Tetrault of Carnegie Mellon. The award, which includes a \$2,500 prize, was

presented during NASI's 22nd Annual Conference in Washington, DC.

An honorable mention went to **John W. "Jack" Gettens** for his work on "Medicaid Expansions: The Work and Program Participation of People With Disabilities" while at Brandeis University.

Gettens is currently a Research Scientist at the Center for Health Policy and Research at the University of Massachusetts Medical School in Schremsbury.

NASI awards this prize in honor of **Senator John Heinz**, who 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. Senator Heinz was a leading expert in the Senate on private pensions, health care, and aging policy.



2010 Heinz Dissertation Award winner Jessie Ramey with Jack Gettens, who received an honorable mention.



NASI Senior Fellow Bob Rosenblatt with NASI member Bill Spriggs, Assistant Secretary for Policy, U.S. Department of Labor.

NASI brings together an interdisciplinary Community of Practice

Alex Hertel-Fernandez, a researcher at the Economic Policy Institute, discusses Social Security solvency with a peer at NASI's "Social Security at 75" event in June 2010.





The National Academy of Social Insurance brings together important pieces of the policymaking puzzle. Our members' expertise plus funding from partners and supporters produces policy results. Our funding partners are the foundation of NASI's financial stability. This stability in turn makes it possible for us to target our energies on NASI's mission. Organizational partners extend NASI's capacity and amplify the impact of our experts' contributions.

You'll read more about our funders in the pages that follow. Here, I want to recognize some of the organizational partners we've collaborated with this past year:

- NASI's work with the National Academy of Public Administration (NAPA) on thorny issues of administering health insurance coverage policy influenced the architects of the Affordable Care Act (ACA).
- Our systematic tracking of the developments in long-term services and supports was shared with The SCAN Foundation through their website library.
- NASI's foray into unemployment insurance policy research was made possible thanks to the W.E. Upjohn Institute for Employment Research and the National Association of State Workforce Agencies.
- NASI's leadership development strategies, and especially our work with student interns was amplified by shared recruitment with the Roosevelt Institute Campus Network.
- Essential to our annual estimates of workers' compensation (WC) benefits and costs is collaboration with WC offices in 56 jurisdictions and as well as private partners that provide data used in our national estimates.
- NASI's new capacity for helping organizations with national constituencies on Social Security is supported by the Ford Foundation. The Ford Foundation reached out to NASI as a source of expertise on Social Security policy and asked us to join them as a convener of constituency organizations with creative plans for extending policy education on Social Security.

Without this collaboration, resource-sharing, and trust built over the years, NASI's work would be less known, less practical, and less effective. We thank you, dear partners.

Pamela J. Larson
Executive Vice President

A Growing Network of Over 800 Leaders and Top Experts

In 2009, NASI accepted 60 distinguished new members:

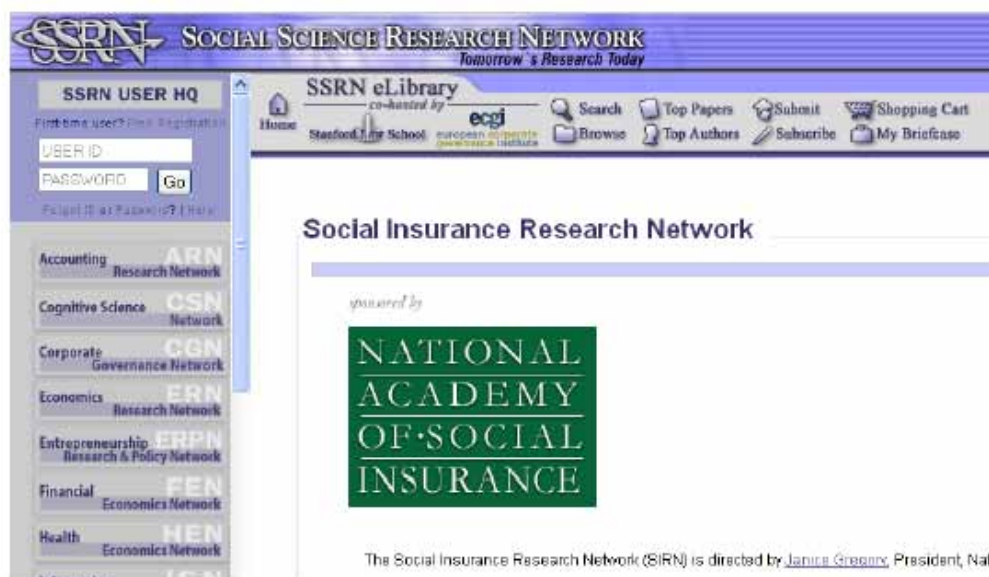
Anne Alstott, Harvard Law School
Dan Bertoni, U.S. Government Accountability Office
Jill Braunstein, National Academy of Social Insurance
Terry Buss, Carnegie Mellon University
Ashley Carson, Older Women's League
Aaron Catlin, Center for Medicare & Medicaid Services
Judy Chesser, New York City Health and Hospitals Corporation
Jonathan Cohn, *The New Republic*
Michael Collins, U.S. Government Accountability Office
Rowland Davis, RMD Pensions Consulting, Inc.
Susan Dentzer, *Health Affairs*
Thomas Domer, Domer Law
Bryan Dowd, University of Minnesota
Irena Dushi, Social Security Administration
Andrew Eschtruth, Center for Retirement Research at Boston College
Karen Friedman, Pension Rights Center
Karen Glenn, Social Security Administration
Marsha Gold, Mathematica Policy Research
Debra Golding, U.S. Department of Labor
Marc Goldwein, The New America Foundation
Steve Gorin, Plymouth State University
Thomas R. Hefty, Blue Cross Blue Shield United of Wisconsin (Retired)
Christopher Howard, College of William & Mary
Andrew Hyman, Robert Wood Johnson Foundation
Leonard Jernigan, Jr., The Jernigan Law Firm
Avis Jones-DeWeever, National Council of Negro Women
Ethan Kra, Mercer
Sarah Lenz Lock, AARP
Mike Manley, State of Oregon Department of Consumer and Business Services
Kenneth Mannella, Social Security Administration

Karen Matsuoka, Office of Management and Budget
Warren McGillivray, Caledon Institute of Social Policy
Sean McNally, Grimmway Farms
Mark Merlis, Consultant
William A. Morrill, Caliber Associates/ICF Consulting
Janemarie Mulvey, Congressional Research Service
Sally Natchek, International Foundation of Employee Benefit Plans
Diane Oakley, U.S. House of Representatives
Kieke G.H. Okma, New York University Wagner School of Public Service
David Pattison, Social Security Administration
Sallyanne Payton, University of Michigan
Yvonne Perret, Advocacy and Training Center
Andrew Peterson, Society of Actuaries
Mary Ann Phillips, Social Security Administration (Retired)
John Phillips, Social Security Administration
Mark Priven, Bickmore Risk Services
Barbara J. Robles, Arizona State University
Michael C. Rogers, Medstar Health
Kathleen Romig, Congressional Research Service
Raymond C. Scheppach, National Governors' Association
Robert D. Shapiro, The Shapiro Network, Inc.
Mauricio Soto, The Urban Institute
Andrew Stettner, National Employment Law Project
Eileen Tell, Univita
Frank Todisco, American Academy of Actuaries
Mark Ugoretz, The ERISA Industry Committee
Ben Washington, Centers for Medicare & Medicaid Services
David Weaver, Social Security Administration
Elliott K. Wicks, Health Management Associates (Retired)
Ludmila Zawistowich, Patton Boggs LLP

Academy Members have the opportunity to enhance understanding of the major issues facing social insurance programs today and in the future.

NASI cannot accomplish its mission and objectives without the dedication and commitment of our Members and other volunteers. Throughout FY 2010, dozens of Members, Associates and other supporters contributed 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. NASI members also serve as volunteer editors for the Social Insurance Research Network (SIRN), which is a series of five e-journals designed to circulate abstracts of research papers (both working and published papers) in all areas of social insurance.



Social Insurance Research Network (SIRN) e-Journal Editors:

Journal on Disability Income & Work Injury Compensation

Edited by: **Edward H. Yelin**, University of California - San Francisco, and **William G. Johnson**, Arizona State University

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

Journal on Poverty, Income Distribution & Income Assistance

Edited by: **Peter Edelman**, Georgetown University Law Center, and **Timothy Smeeding**, Syracuse University

Journal on Social Security, Pensions & Retirement Income

Edited by: **Patricia E. Dilley**, University of Florida

Journal on Unemployment Insurance

Edited by: **Marc Baldwin**, Washington State Employment Security Department

Thank you for contributing your valuable time, expertise, and resources to NASI.



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NASI members dedicate their careers to strengthening social insurance systems so that Americans can enjoy greater economic security.

NASI would like to recognize and pay tribute to the following members who passed away in 2009-2010:

Monroe Berkowitz

Founding member of NASI and recipient of the 2006 Robert M. Ball Award for Outstanding Achievements in Social Insurance; Professor of Economics at Rutgers University and disability policy expert who developed the “Ticket to Work” program for disability rehabilitation signed into law by President Clinton in 1999

Jerome Brazda

Founding member of NASI and President of Brazda HealthCare Policy Information

Robert Butler

Founding member of NASI; Founding Director

of the National Institute on Aging of the National Institutes of Health and Pulitzer Prize winner in non-fiction for *Why Survive? Being Old in America*

William D. Fullerton

Founding member of NASI; former President of Health Policy Alternatives and deputy administrator of the federal Health Care Financing Administration

Robert J. Myers

Founding member of NASI; Chief Actuary of the Social Security Administration (1947-1970) and Executive Director of the National Commission on Social Security Reform (1982-1983)

Members with leadership roles in the Obama Administration (2009-2010) listed in alphabetical order:

Rebecca Blank, Under Secretary of Commerce for Economic Affairs, U.S. Department of Commerce

Jonathan Blum, Director of the Center for Medicare Management (CMM), and Acting Director, Center for Drug and Health Plan Choice (CPC), Centers for Medicare and Medicaid Services (CMS), U.S. Department of Health & Human Services

David Blumenthal, M.D., National Coordinator for Health IT, U.S. Department of Health & Human Services

Phyllis Borzi, Assistant Secretary of Labor, U.S. Department of Labor

Peter Budetti, M.D., Deputy Administrator, Center for Program Integrity, Centers for Medicare and Medicaid Services (CMS), U.S. Department of Health & Human Services

Melinda Beeuwkes Buntin, Director, Office of Economic Analysis and Modeling, Office of the National Coordinator for Health IT, U.S. Department of Health & Human Services (on leave from RAND Corporation)

Henry Claypool, Director, Office on Disability, U.S. Department of Health & Human Services

Jeffrey Crowley, Director, Office of National AIDS Policy; White House Senior Advisor on Disability Policy

Nancy-Ann DeParle, Counselor to the President and Director, White House Office of Health Reform

Kenneth Feinberg, Managing Partner and Founder, The Feinberg Group, LLP; Special Master for TARP Executive Compensation; Head of BP Claims Fund

Jason Furman, Deputy Director, National Economic Council

Sherry Glied, Assistant Secretary of Planning and Evaluation, U.S. Department of Health & Human Services

Michael Hash, Senior Advisor, White House Office of Health Reform

Jeffrey Liebman, Executive Associate Director, Office of Management and Budget

Alan Krueger, Assistant Secretary for Economic Policy, U.S. Department of the Treasury

Jeanne Lambrew, Director, Office of Health Reform, U.S. Department of Health & Human Services

Jacob Lew, Former Deputy Secretary of State for Management and Resources, U.S. Department of State; nominated for Director of the Office of Management and Budget

Marsha Lillie-Blanton, Director, Division of Quality, Evaluation & Health Outcomes, U.S. Department of Health & Human Services

Peter Orszag, Former Director, Office of Management and Budget; Distinguished Visiting Fellow, Council on Foreign Relations

Alice Rivlin, Senior Fellow, The Brookings Institution; Member of the National Commission on Fiscal Responsibility and Reform (appointed by President Obama)

William Spriggs, Assistant Secretary for Policy, U.S. Department of Labor

Andy Stern, Former President, SEIU; Member of the National Commission on Fiscal Responsibility and Reform (appointed by President Obama)

Lawrence Summers, Director, National Economic Council

*2010 Robert M. Ball Award for Outstanding
Achievements in Social Insurance:
Celebrating the legacy of Robert M. Ball
and recognizing the impact of John C. Rother*

On June 22nd, NASI celebrated and honored the legacy of our founder, Robert M. Ball, Commissioner of Social Security (1962-1973), by recognizing the significant contributions John Rother has made to strengthening social insurance for Americans. Like Bob Ball, Rother has dedicated his entire career, so far, spanning over thirty years, to improving the Social Security and Medicare programs.

More than 350 policy, research, advocacy and business leaders came together to celebrate Rother's achievements. The evening was filled with heart-felt testimonials and featured a tribute video with congratulations from colleagues, the White House, former President **Bill Clinton**, and other luminaries (the video is available for viewing on NASI's YouTube channel).



John Rother, Executive Vice President of Policy and Strategy for AARP, gives his acceptance speech.

John's work has made a considerable impact on the U.S. social insurance system in a number of ways. Responsible for formulating AARP's policies that guide advocacy at both the national and state-level, he has been an active voice for seniors in the recent health care reform process. John continues to work tirelessly to promote greater understanding of social insurance among key audiences and the general public using an array of innovative communication strategies. He is committed to cultivating the next generation of leaders in social insurance and is actively involved in NASI's leadership development programs.

John is a Founding Member of the Academy. Since 1986, John has provided NASI with invaluable advice and fresh insights and actively supported NASI's research and student internship programs.

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Health Care Reform,
The Brookings Institution

The Honorable Harry Reid
U.S. Senate

The Honorable John D. Rockefeller IV
U.S. Senate

John Rother has dedicated his career to tackling the most challenging issues facing the diverse aging population in the U.S.

2010 Robert M. Ball Award Event Committee

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Thank you to the individuals and organizations that supported the 2010 Robert M. Ball Award event honoring John Rother. Your generous contributions strengthen NASI's programs and overall ability to achieve strategic objectives.

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NASI Board Chair Kenneth Apfel presents the 2010 Robert M. Ball Award for Outstanding Achievements in Social Insurance to John Rother, Executive Vice President of Policy and Strategy for AARP.



Event Co-Chairs, Tricia Neuman, Kaiser Family Foundation, and Steve McConnell, Atlantic Philanthropies, deliver a humorous roast of their good friend John at the event.

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A Committed Network of Supporters Makes NASI's Forward-Looking Work Possible

The National Academy of Social Insurance would like to recognize the following individuals for their generous support in FY 2010 (continued on page 44).

VISIONARIES

Anonymous

John Biggs

Howard Fluhr

John Kimpel

Pamela Larson

Patricia Owens



Larry Minnix, President & CEO, American Association of Homes and Services for the Aging, leads the celebratory toast, with NASI President Janice Gregory, to John Rother at the 2010 Robert M. Ball Award.

STRATEGISTS

Mark Novitch

Gilbert Omenn

Henry Patterson

Thomas Hefty



Sara Somers, daughter of Anne M. Somers, meets Bill Arnone, co-chair of NASI's 2010 Conference, with Virginia Reno and Pamela Larson during the *Social Security at 75* event held on June 22, 2010.

The generosity of these individuals translates into a stronger social insurance system that contributes to economic security and a vibrant economy.

EDUCATORS

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John Boyd
Jill Braunstein
Deborah Chollet
Patricia Dilley
Renato DiPentima
Janice Gregory
Paul O'Neill
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NASI members Bob Rosenblatt, Laurel Beedon, and Sandy Timmerman

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The National Academy of Social Insurance would like to recognize the following foundations, institutions, and associations for their generous support of NASI's mission and programs during FY 2010.

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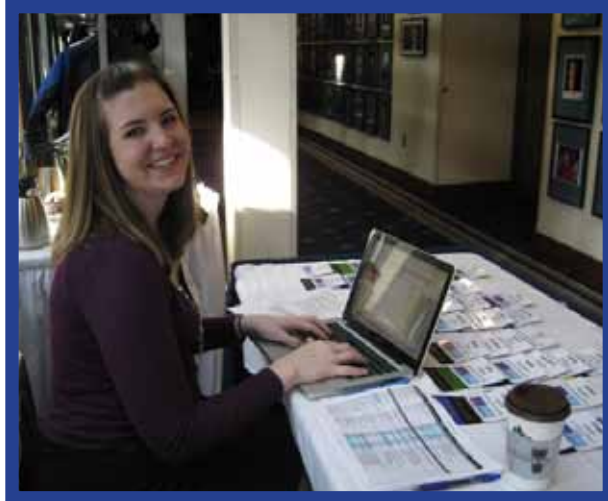
Social Security Works

Family of Anne R. Somers

Family of Nathan J. Stark

Family of Eileen P. Sweeney

Elizabeth Lamme, NASI
Income Security Policy
Associate, staffing the
registration table at the
2010 Conference.



NASI strives to achieve efficient **Management & Operations**



Deric Joyner, NASI
Project Associate,
welcoming over
100 participants to
“Demystifying Social
Security: Academy for
Interns” in July 2010.

Integrated Teamwork at NASI

Pamela J. Larson is the Executive Vice President at NASI. Directing NASI since 1987, Larson works closely with the Academy's members, board, and staff to implement its programs on leadership development, public understanding, policy education, and the development of fund-raising initiatives and NASI services to social insurance professionals. She received her master's in Regional Planning from Cornell University.

Jill C. Braunstein is the Director of Communications at NASI. She oversees implementation of media outreach and visibility strategies and manages the NASI website. Braunstein has a B.A. in Journalism and an M.A. in Public Policy with a concentration in Women's Studies, both from George Washington University.

Lee Goldberg is NASI's Director of Health Policy. Goldberg oversees NASI's Medicare and health insurance projects, as well as projects on long-term services and supports. Goldberg holds a law degree from the George Washington University and a masters' degree in International Economics and International Relations from the Johns Hopkins School of Advanced International Studies.

Yolanda Hampton is NASI's Finance Manager. Hampton maintains NASI's accounting system, keeps NASI's financial records, and provides financial information to the management. In addition, she assists in other finance related areas, such as preparation of the budget, payroll, and employee benefits.

Deric Joyner is the Project Associate at NASI. He leads and assists in the planning and execution of NASI events, including study panels and conferences. He also conducts outreach for NASI's internship programs and assists with all aspects of NASI communications. Joyner received his B.A. in Political Science from Morehouse College.

Elizabeth Lamme is the Income Security Policy Associate at NASI. She has co-authored various NASI publications, such as "Social Security Finances: Findings of the 2010 Trustees Report." Lamme earned her B.A. in Psychology from the State University of New York at Geneseo and is currently earning her M.A. in Government from Johns Hopkins University.

Crystal Nelson is Executive Assistant at NASI and has been a member of the NASI staff for over three years. Nelson wears many different hats, including assisting the EVP, staffing the Membership Committee, maintaining the membership database, and bookkeeping.

Kristine Quinio is the Director of Membership Strategies. She works closely with the EVP and other NASI staff

members to implement membership engagement and development strategies. 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.

Virginia Reno is the Vice President for Income Security. Reno plans and directs the Academy's work on retirement income, workers' compensation, disability insurance, and related programs. She has led numerous studies for NASI on Social Security and disability programs. Reno received her B.A. from the Honors College of the University of Oregon.

Bob Rosenblatt is a Senior Fellow at NASI and a freelance writer and editor. He worked with NASI staff to create the *Social Insurance Sourcebook* and has represented the Academy at many events. 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.

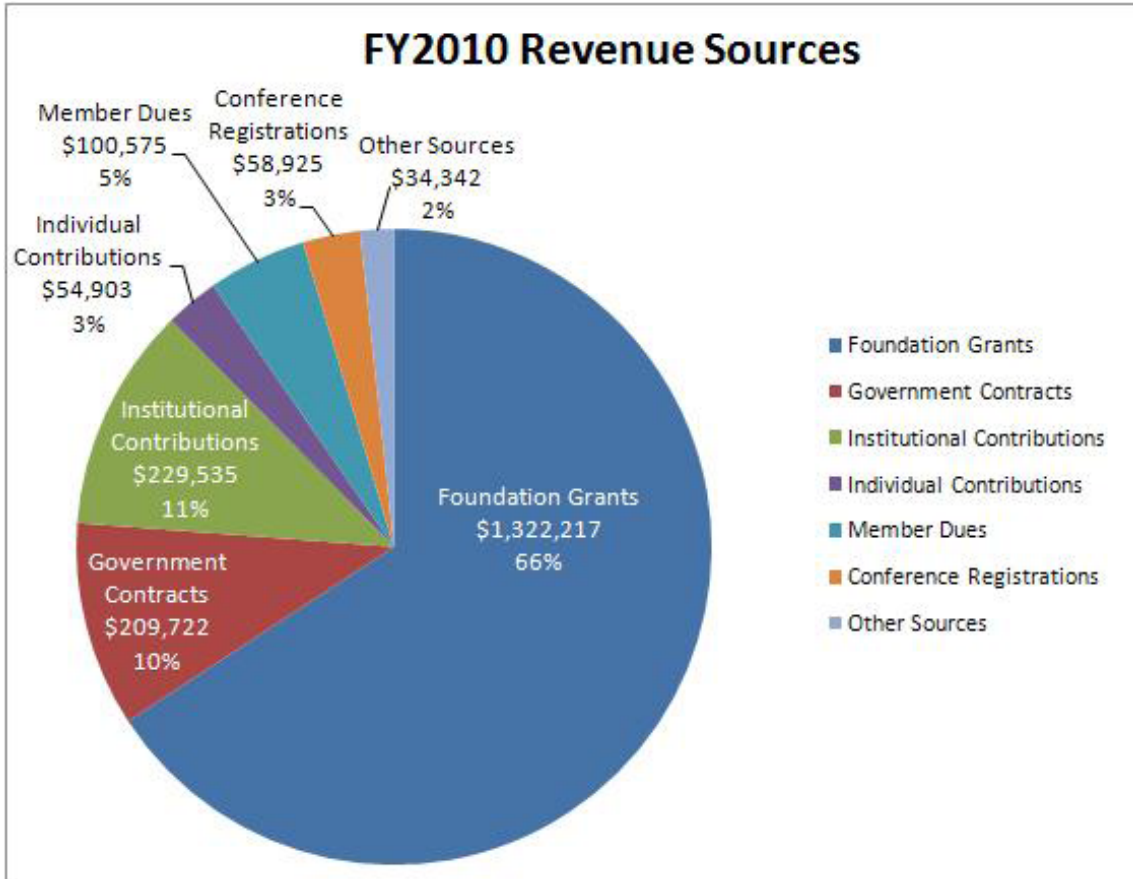
Ishita Sengupta is the Workers' Compensation Research Associate at NASI. She co-authors NASI's annual workers' compensation report, which provides the only comprehensive data on workers' compensation cash and medical payments for the nation and for each state, the District of Columbia, and federal programs. Sengupta has a Ph.D. in Economics from the University of Connecticut.

Ben Veghte is the Income Security Research Associate at NASI. He is responsible for Social Security policy education activities at NASI and recently co-authored (with V. Reno) "Economic Status of the Aged" in R.H. Binstock and L. George (Eds), *Handbook of Aging and the Social Sciences*, 7th Edn (Oxford: Elsevier, forthcoming). Veghte has a B.A. from Columbia University, an M.A. and Ph.D. in Modern European Cultural and Intellectual History from the University of Chicago, and a Master's in Public Administration from the Harvard Kennedy School.

Elisa Walker joined NASI in September 2010 as the Income Security Policy Assistant. She supports the Income Security team with various projects, including briefs, events, conference planning, and grant activities. Walker has a B.A. in Sociology and Spanish from the University of Mary Washington.

Sabiha Zainulbhai joined NASI in October 2010 as the Health Policy Assistant. She assists the Health Policy Director with NASI's project on health insurance exchanges and conducts research on other health policy issues, such as Medicare and health reform implementation. Zainulbhai received a bachelor's degree in Economics from the George Washington University.

Where does NASI's funding come from?



Approximately two-thirds of NASI's revenue, during FY 2010, came in the form of program grants from major foundations (restricted funds). NASI also earned revenue through government contracts, including with the Centers for Medicare & Medicaid Services, the Social Security Administration, and the U.S. Department of Labor.

NASI's unrestricted funding for planning, management and operations are earned primarily through contributions from other institutions and associations, membership dues, individual donations, and conference registration fees.

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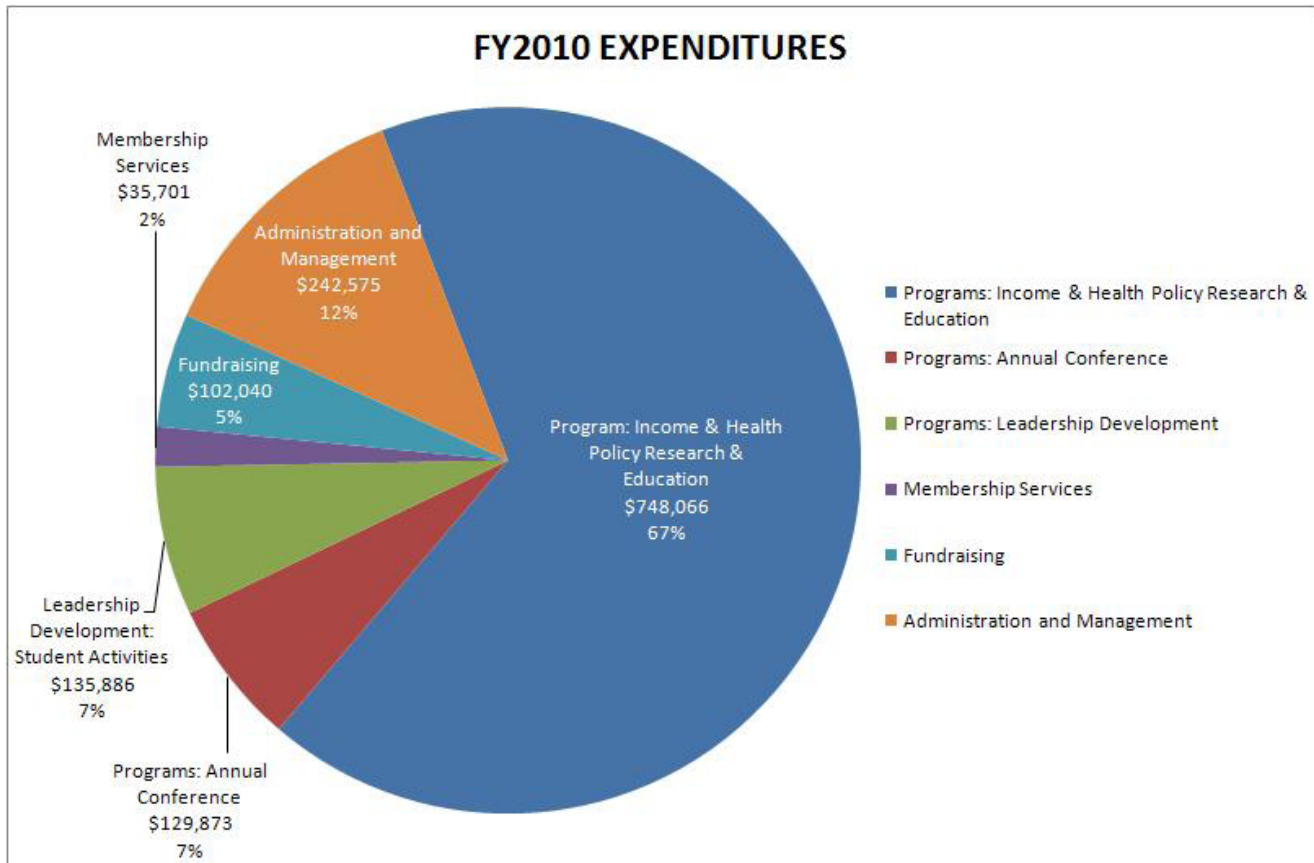
Mark Novitch, George Washington University

Lawrence Thompson, Urban Institute

Jane Ross, National Research Council of The National Academies

Marina Weiss, March of Dimes Birth Defects Foundation

How does NASI utilize its resources?



During FY 2010, approximately 83% of NASI's total budget was spent directly on program activities (Policy Research & Education, the 2010 Conference, and Leadership Development) and membership services. Administration and fundraising expenses were approximately 17% of the total budget. This is a significant improvement over FY 2009, when 74% of NASI's budget was spent on programming costs, and administration and fundraising costs necessitated a greater share of the total budget.

Thanks to successful program development and fundraising efforts in FY 2009, as well as

a focus on efficient staffing, NASI has been able to increase its operational efficiency -- and focus most of our resources directly on achieving our mission.

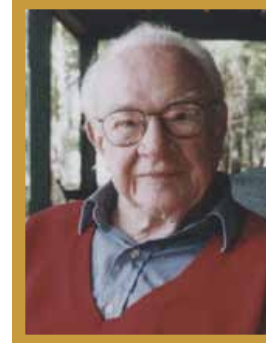
2010 Audit Committee Members:

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

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Why Support NASI?



NASI Founder Robert M. Ball

You can help NASI continue its forward-looking work in social insurance. Your donation enables NASI to promote public policies and programs that contribute to all Americans' economic security today and in the future. With your support at one of the giving levels below, we can accomplish many things.

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(\$1,000 and above)

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 and above)

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.

EDUCATOR

(\$300 and above)

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 and above)

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.

NASI is a 501(c)(3) public charity (FEID# 52-1451753), and your contribution is tax-deductible. Please visit www.nasi.org to donate.

Thank you for supporting the National Academy of Social Insurance.

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