

NATIONAL  
ACADEMY  
OF SOCIAL  
INSURANCE

**FY 2008 Report**  
**July 1, 2007- June 30, 2008**

*NASI's Mission:*  
*To promote understanding of how social insurance contributes*  
*to economic security and a vibrant economy.*

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## **NASI promotes understanding of how social insurance contributes to economic security and a vibrant economy.**

This year is dedicated to the legacy of Robert M. Ball, the Founding Chair of the National Academy of Social Insurance (NASI). Social insurance benefits provide a solid base of economic security for workers and their families and, more than anyone, Bob Ball worked tirelessly throughout his career to maintain and improve these essential protections. In addition, recognizing that the social insurance community is aging, Bob, through NASI, worked to encourage more young scholars and professionals to pursue careers in the field. For 21 years, NASI staff and members have been carrying on Bob's work by educating policymakers, analysts, and the general public, and by engaging young scholars through NASI's internship programs and events. NASI will continue its public education efforts to broaden the discussion around social insurance program challenges and solutions.

NASI's Board of Directors completed a strategic planning process in May 2008 and adopted the new mission statement (see above). The strategic plan sets out goals and values that help set priorities among the many opportunities and challenges ahead for NASI. It is around the five goals that this annual report is organized.

### NASI's goals and priorities for the next three years (2009-2011)

- 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.

With the post-election transition to new federal and (some) state government leadership and the subsequent review of federal and state policies and programs likely to take place, NASI will play a prominent role in the discussions of social insurance. This report highlights activities that were accomplished during NASI's fiscal year (July 1, 2007- June 30, 2008) and in recent months.

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

**Strategic Goal for Communications: Communicate NASI's outputs effectively to key audiences.**

Activities under Goals 1 and 2 include major policy research projects, annual convening events, and many other activities to produce and communicate policy research findings and promote informed discussion of social insurance.

## Major Policy Research Projects

### Workers' Compensation Data Project

Under guidance of its Workers' Compensation Data Panel, NASI issued the 11<sup>th</sup> and 12<sup>th</sup> annual reports, [Workers' Compensation Benefits, Coverage, and Costs, 2006](#) in August 2008 and [Workers' Compensation Benefits, Coverage, and Costs, 2005](#) in August 2007. The reports, by Ishita Sengupta, Virginia P. Reno, and John F. Burton Jr. and their accompanying press releases, [Drop in California's Cash Spending Lowers U.S. Workers Compensation Benefit Spending in 2006](#) and [Drop in California Spending Lowers U.S. Workers' Compensation Benefits and Costs in 2005](#), note how major reforms in California affected national trends. The data project is funded by three federal agencies that use the data: the Social Security Administration, the Centers for Medicare & Medicaid Services, and the Department of Labor.

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 *IAIABC Journal*, Fall 2008 issue. The California Health Care Foundation funded the brief.

### Strengthening Social Security for Vulnerable Groups

NASI received support in April 2008 from the Rockefeller Foundation to award 12 innovation grants for policy proposals to strengthen Social Security for vulnerable groups. NASI issued a [call for proposals](#) in May, 2008, and received about 40 replies. An Advisory Committee reviewed and ranked the proposals. NASI and the Foundation [announced the awardees](#) at Rockefeller Foundation headquarters in New York City on July 24, 2008. Awardees submitted draft papers in September 2008 and met with the Advisory Committee on October 16, 2008, to discuss each paper. Final papers will be available on NASI's website. A synthesis report of the project will be released at a roundtable at NASI's 2009 annual conference and findings will be shared with the Congress and the new Administration in 2009.

### Social Security Synthesis Project

The report, [Social Security: An Essential Asset and Insurance Protection for All](#), issued in January 2008, synthesizes the Social Security research and outreach activities supported by the Ford Foundation. With support from the Ford Foundation, NASI planned a meeting for Foundation grantees who met at Ford Foundation headquarters in New York City in July 2007. The meeting agenda, [Social Security Grant-making: Sharing the Results](#), featured the work of over 12 grantee organizations that brought collaboration between researchers and community groups to reach people most reliant on Social Security, including women, communities of color, and low-wage workers generally. NASI released the synthesis report at a conference roundtable on February 1, 2008. Media outlets with a combined reach of over 80 million readers, viewers and listeners picked up the press release for the synthesis report, [Social Security Is Worth \\$225,000 for a Typical Retiree..](#)

### Management Analysis of Expanding Access to Health Care

NASI and the National Academy of Public Administration have convened an expert study panel to conduct a management analysis of issues in expanding access to health care. The co-chairs are Robert Berenson of the Urban Institute and William A. Morrill of Caliber Associates. The study panel met on January 6, 2007, November 14, 2007, and January 30, 2008 and

commissioned a series of background papers. The background papers will be published in December on the websites of NASI and the Robert Wood Johnson Foundation, which is funding the project. The panel's final report will be released in January 2009.

## Events

### 20<sup>th</sup> Annual Conference

Over 300 participants engaged in NASI's 20<sup>th</sup> annual conference, [\*Getting to Universal Health Insurance Coverage\*](#), on January 30 – February 1, 2008. Co-chaired by Jonathan Gruber of MIT, Marsha Lillie-Blanton of the Henry J. Kaiser Foundation, and Chris O'Flinn of the ELM Income Group, the conference featured keynote addresses by Uwe Reinhardt of Princeton University, and Drew Altman of the Henry J. Kaiser Family Foundation. A lively debate on the pros and cons of a single-payer approach to health care reform featured James Morone of Brown University and Len Nichols of the New America Foundation. Conference roundtables on February 1 included:

- *The Role of States in Financing and Implementing Universal Coverage*, led by Judith Moore of the National Health Policy Forum;
- *Addressing the Invisible Uninsured: Long-term Care as Part of Health Care Reform*, led by Lee Goldberg of the Service Employees International Union;
- *Partnerships for the Employment of People with Disabilities*, led by independent consultant Kenneth McGill;
- *Too Many Cuts in Unemployment Insurance Financing*, led by Steve Wandner of the U.S. Department of Labor;
- *Managing Life and Spending Changes During Retirement—Insights From Research*, led by independent consultant Anna Rappaport; and
- *Social Security Education: Reaching Communities of Color, Women and Youth*, which released the NASI report on the Social Security synthesis project.

In addition to the many table sponsors, the Robert Wood Johnson Foundation provided major support for the conference.

### 21<sup>st</sup> Annual Conference

Planning for the conference, [\*Social Insurance, Fiscal Responsibility, and Economic Growth\*](#), to be held January 29-30, 2009, is well underway. This conference will feature a wide variety of experts who will explore policy solutions to stagnant wages, frozen or terminated pension plans, rising health care costs, and shrinking employer-sponsored health insurance in light of tight federal and state budgets and slow economic growth. Conference co-chairs are: Howard Fluhr of The Segal Company, Robert Greenstein of the Center on Budget and Policy Priorities, and Renee Landers of Suffolk University Law School. The Ford Foundation and the Peter G. Peterson Foundation provided the planning grants for this conference.



## Robert M. Ball Award Event

On May 28, 2008, the [fifth annual](#) Robert M. Ball Award for Outstanding Achievements in Social Insurance was presented to Peter Diamond, Institute Professor at Massachusetts Institute of Technology (MIT), before a crowd of more than 200 well-wishers at the National Press Club in Washington, D.C. The evening's program featured highlights from many facets of Diamond's career and was a successful fundraiser for NASI.



On May 28, 2008, NASI convened a policy education seminar, [Growing Risks for Workers and Growing Fiscal Deficits: Challenges for Social Insurance](#), in conjunction with the event honoring Peter Diamond. The seminar drew rave reviews from the 125 attendees. Peter Orszag, Director of the Congressional Budget Office, provided insights from behavioral economics on approaches to control health costs; Stephen C. Goss, Chief Actuary of the Social Security Administration, spoke of sustaining Social Security benefits; Andrea Louise Campbell, associate professor of political

science at MIT, reported on Americans' views on public benefits and costs; and Peter Diamond, Institute Professor at MIT, provided overall commentary. This event was supported by the Ford Foundation and numerous individual donors in memory of Robert M. Ball.

## Policy Research, Communications, and Outreach

The following activities drew on NASI policy research activities and member expertise to reach broader audiences and are presented in chronological order.

The September 2007 policy education brief, [Social Insurance Benefits Need Not Limit Economic Growth: New Evidence](#) by Joni Lavery reports on a NASI seminar that featured findings of Peter Lindert, Distinguished Professor of Economics at the University of California-Davis. His scholarly research shows that public programs can help protect Americans from economic insecurity without impairing economic growth. Providing economic security for families also encourages people to take the risks necessary to foster innovation, which drives productivity. The Annie E. Casey Foundation funded the seminar.

In September 2007, NASI held a road show for journalists on *Covering the Boomers and the Next Generations* in Pittsburgh. *The one-day seminar*, held in partnership with the National Press Foundation, provided an intellectual mixing bowl for members of the press, senior staff from the social sector, and experts on aging in the Pittsburgh area. This event was supported by the Jewish HealthCare Foundation.

A briefing paper, [Building on Social Security's Success](#) by Virginia P. Reno was presented at the Economic Policy Institute on November 20, 2007. This paper addresses the question: How can we build on the strengths of Social Security—its fiscally responsible design, its universality, progressivity, efficiency, and its effectiveness—to meet the needs of working families in the 21st century? The Economic Policy Institute funded the paper and event.

On December 3, 2007, NASI convened a policy education workshop, [Creating Effective Public and Private Disability Policy: Thinking Outside the Box](#), before a standing-room only crowd in the U.S. Capitol Building. Attendees discussed ways in which both public and private programs

can help workers with disabilities return to gainful employment. Support from America's Hospital Insurance Plans and Unum Insurance Company provided partial support for the event.

In February 2008, NASI released the brief, [\*Children's Stake in Social Security\*](#), by Joni Lavery and Virginia Reno. The brief was shared with both social insurance and children's advocacy organizations. It finds that about 6.5 million children under age 18 receive part of their family income from Social Security. The press release, [\*Social Security Lifts 1.3 Million Children Out of Poverty\*](#), emphasizes the multigenerational role of Social Security. The Annie E. Casey Foundation supported this project.

In March 2008, NASI issued the brief, [\*Achieving Universal Participation in Social Insurance Systems\*](#), by Paul N. Van de Water. It examines different ways of achieving universal participation in programs designed to protect American families from common economic risks, such as the loss of earning and the cost of health care. The AFL-CIO provided funds for the brief.

With the March 25, 2008, release of new trustees reports, NASI issued updated policy briefs, [\*Social Security Finances: Findings of the 2008 Trustees Report\*](#), by Joni Lavery and [\*Medicare Finances: Findings of the 2008 Trustees Report\*](#), by Paul N. Van de Water. On March 25, 2008, NASI issued a [media alert](#) informing journalists of bi-partisan NASI experts to contact for commentary on the new trustees reports. On April 4, NASI held a briefing on Capitol Hill, [\*What's the News in the 2008 Social Security Trustees Report? Policy Responses to the New Projections\*](#).

On March 27, 2008, in partnership with Wider Opportunities for Women (WOW), NASI presented *Social Security: Key to Adequate Income for Elders*, at a workshop on *Redefining Poverty and Elder Income Adequacy* at the joint meeting of the American Society on Aging and the National Council on Aging (ASA/NCOA) in Washington, DC. About 50 practitioners from around the nation discussed Social Security and ways to help seniors in their communities make ends meet. Discussion also featured new work on measuring economic self-sufficiency for older couples and singles by Wider Opportunities for Women.

On March 29, 2008, NASI presented *Can We Afford Our Parents' Retirement?* at another workshop at the joint meeting of the ASA/NCOA. An audience of about 40 practitioners and students listened to NASI members present information about the intergenerational relationship between baby boomers' public and private benefits and the workforce of younger taxpayers, describing how a supportive political and economic climate is needed to make that happen.



On April 9, 2008, President Margaret C. Simms represented NASI in her address to the Roosevelt Institution's celebration of the 75<sup>th</sup> anniversary of the New Deal. In a session on "Continuing the Covenant in an Era of Change: Social Security and Health Care: The Twin Pillars of a Just Society," Simms spoke of Bob Ball's lifelong contribution to social insurance. She highlighted Bob Ball's legacy plan to bring long-range solvency to Social Security without cutting benefits. Over 300 participants engaged in the celebration at the Willard Hotel in Washington, DC.

On April 10, 2008, NASI convened a briefing [\*Paying for Health and Retirement Benefits in the 21<sup>st</sup> Century: Exploring a VAT\*](#), featuring findings of Michael J. Graetz of Yale Law School from his book, *100 Million Unnecessary Returns: A Simple, Fair, and Competitive Tax Plan for the United States*. The session, at Barbara Jordan Center in Washington, DC, drew over 100 attendees who were actively engaged in discussion. The Ford Foundation supported this forum.

During the week of May 7, 2008, NASI participated in a [\*Wall Street Journal\* blog](#) on the retirement debate. It featured a submission from Virginia Reno, “Building on Social Security’s Success,” which drew extensive commentary, including from NASI members Richard Leone, Lisa Mensah, Max Horlick, Joan Entmacher, Paul Kleyman, Henry Aaron, and Patricia Dilley, among others.

On May 30, 2008, NASI participated in a briefing on [\*Strengthening Medicare's Role in Reducing Racial and Ethnic Health Disparities\*](#), in Oakland, CA. Congressman Pete Stark spoke, as did several physicians, policy experts, and journalists concerned with health disparities. Some 45 people attended. The California Endowment funded this briefing.



On August 22, 2008, NASI issued a [\*media alert\*](#) about NASI bi-partisan experts available to comment on I.O.U.S.A, a movie about deficits and entitlements distributed by the Peter G. Peterson Foundation. The alert offered bi-partisan experts available to discuss Social Security, Medicare, and federal tax and spending issues in the I.O.U.S.A. movie.

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.

In September 2008, NASI issued an *Election Toolkit on Social Security and Medicare*. The toolkit included links to NASI’s primer on Social Security, twelve (12) NASI briefs, the Ford synthesis report, *Social Security: An Essential Asset and Insurance Protection for All*, Virginia Reno’s *Building on Social Security’s Success*, and NASI’s *Sourcebook* on social insurance. The [\*Social Security primer\*](#) and the [\*Social Security Sourcebook\*](#) were updated for this toolkit. The toolkit was designed to assist those who are involved in election debates, issue forums or those who are looking for accessible, nonpartisan material for students about social insurance issues. New America Media included it in their October newsletter, which reaches growing numbers of new and ethnic media. The Ford Foundation supported this work.

On October 6, 2008, NASI convened an educational seminar [\*Regulating Markets: The Private Abuse of the Public Interest\*](#) at the National Press Club. 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, which was funded by the Hubert Humphrey Institute of the University of Minnesota.



On October 16, 2008, NASI convened a policy education workshop [\*Pathways to Economic Security for People with Disabilities: Social Insurance, Asset Development, and Supported Employment\*](#). In partnership with the National Institute for Disability and Rehabilitation Research (NIDRR), this workshop showcased disability and employ-related research findings and initiatives.

On October 14 and 23, 2008, NASI facilitated convenings sponsored by The SCAN Foundation. The first convening was held in Burbank, California, and the second was in Washington, DC. The broad strategic goals of The SCAN Foundation are to create public awareness, to develop policies, and to support innovative programs related to senior healthcare, specifically long-term care. NASI brought together key stakeholders in the long-term care field to help The SCAN Foundation develop specific objectives and strategies to meet their three overarching goals.

### **Newsletters and Website Redesign**

NASI newsletter, *Social Insurance Update*, was sent to the more than 4,000 people on NASI's mailing list.

The [December 2007](#) issue featured *Building on Social Security's Success*; an introduction of NASI visiting scholar Hector Ortiz; and information about NASI's 2008 policy conference *Getting to Universal Health Insurance Coverage*.

The [April 2008](#) issue featured four new NASI briefs (*Children's Stake in Social Security*; *Social Security Finances: Findings of the 2008 Trustees Report*; *Medicare Finances: Findings of the 2008 Trustees Report*; and *Achieving Universal Participation in Social Insurance*); the Ford synthesis report (*Social Security: An Essential Asset and Insurance Protection for All*); announcement of three upcoming briefings (*the 2008 Robert M. Ball Award Reception and briefing*; *the 2008 Social Security Trustees briefing*; and *"Paying for Health and Retirement Benefits in the 21<sup>st</sup> Century: Exploring a VAT*).

The [July 2008](#) issue featured NASI's participation in the *Wall Street Journal*/Allstate Insurance "Retirement Blog;" a summary of NASI's 2008 Intern Academy, *Embracing Your Future: Interns Discuss Social Security and Medicare*; and announcement of NASI's 2009 policy conference *Social Insurance, Fiscal Responsibility, and Economic Growth*.

#### **Website Redesign**

In 2008, NASI began a website redesign project, supported by the Ford Foundation. (The first and only redesign of the NASI website was completed more than eight years ago.) The new website, which will be launched in the Spring of 2009, will dramatically improve users' ability to find what they are looking for (e.g. a full keyword search), content readability, and be visually appealing. In addition, the site will have member forums and interactive features, including a more easily searched member directory.



## **Strategic Goal for Leadership Development: Develop future leaders of social insurance in the United States.**

By building a more diverse pool of members and associate members, NASI strengthens its pipeline for future diversity of human resources, research topics, and broader public education.

**Interns:** NASI hosts [four internship programs](#) each summer: The Washington Internship on Social Insurance, the Somers Aging and Long-Term Care Research Internship, the Nathan J. Stark Internship for Nonprofit Development, and the Eileen Sweeney Graduate Internship in Disability Policy. After recruiting public policy-minded students from across the country, NASI received a total of 48 full applications for the four programs, of which 14 students were placed. The internship programs are funded by AARP, the Retirement Research Foundation, and individual donors.

**[The John Heinz Dissertation Award:](#)** The 2008 winner of this prestigious award was Sandra Levitsky (University of Wisconsin – Madison, Sociology) for her dissertation, “Private Dilemmas of Public Provision: The Formation of Political Demand for State Entitlements to Long-Term Care.” The 2008 Honorable Mention was Erin Strumpf (Harvard University, Health Policy and Economics) for her dissertation, “Employment, Health Insurance, and Health Care for Vulnerable Populations: Early Retirees, Low-Income Adults, and Racial/Ethnic Minorities.” The Heinz Family Foundation supports the award.

**Visiting Scholars:** Syracuse University Doctoral student, Hector Ortiz, spent the year with NASI as a Visiting Scholar. Ortiz wrote a NASI proposal for a Young Professors Summer Institute among other contributions. Canadian Actuary, Doug Andrews, also spent the summer at NASI assisting with the summer intern academy before completing his dissertation and beginning a professorship in the U.K. Andrews’ work was supported by the Actuarial Foundation.

**2008 Summer Intern Academy:** On July 17, 2008, NASI convened the fourth annual Summer Intern Academy, [Embracing Your Future: Interns Discuss Social Security and Medicare](#). Over 100 interns registered for the academy, with 91 attending the event. The interns represented a wide variety of academic disciplines and geographic locations. 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 draw in younger audiences to the Summer Academy, which was supported by the American Association of Homes and Services for the Aged, Employee Benefit Research Institute, The Ford Foundation, Global Policy Solutions, LLC, The Kaiser Family Foundation, National Council of La Raza, and Schering-Plough.



The third annual Summer Intern Academy, [Can We Afford Our Parents’ and Grandparents’ Retirement?](#) was held on August 4, 2007. Of the 81 attendees, one-third had yet to finish their bachelor’s degrees, one-third had completed a BS or BA, one-third had completed their master’s degree programs, and one was still in high school. They hailed from all over the country (and the world) and were from a range of disciplines. The discussion was successful in engaging the attendees and the NASI experts who volunteered to help the young people learn more. This event was supported by AARP and the Ford Foundation.

## **Strategic Goal for Membership: Use, recognize and sustain the expertise of members in NASI's work.**

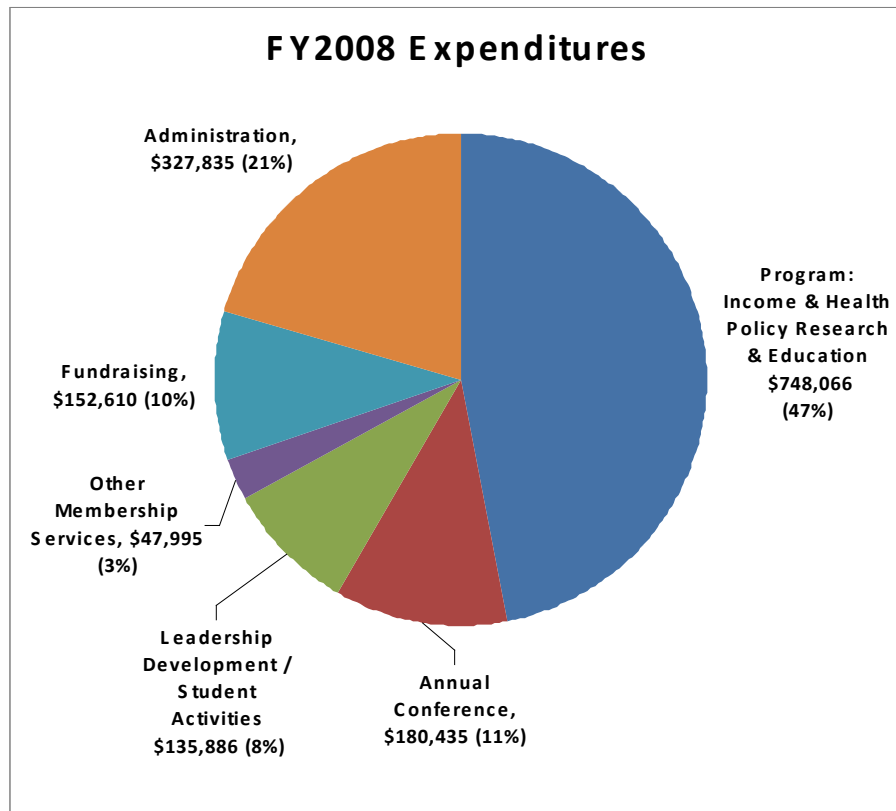
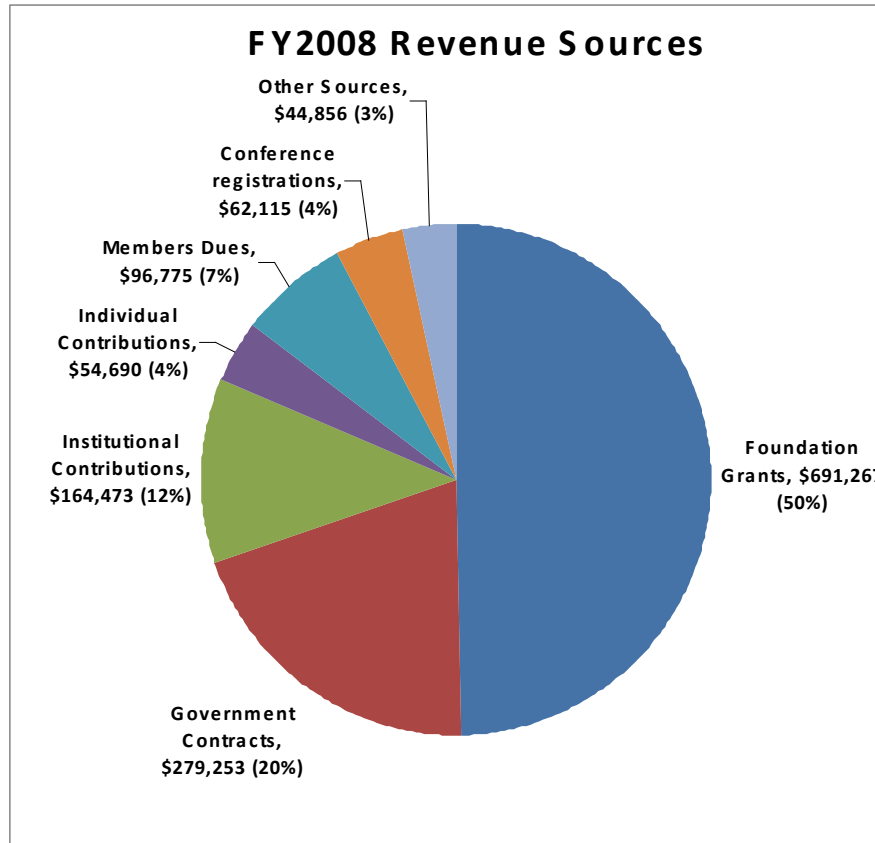
**New NASI members:** Individuals are considered for membership if they are nominated by two NASI members in good standing and meet [the criteria set](#) by the Membership Committee and Board of Directors.

In 2007 the Membership Committee received 52 nominations. After a thorough review, the Committee recommended that forty-five individuals be invited to become members. In 2008 the Membership Committee received 49 nominations and recommended that forty-two individuals be invited to become members. The Board of Directors ratified the Committee's recommendations. Of the eighty-seven candidates recommended for membership, 23% were racial and ethnic minorities and 40% were women, thus developing NASI's diversity even further.

**[Social Insurance Research Network \(SIRN\)](#).** SIRN is a series of online "journals" that publish abstracts of research papers in all areas of social insurance. The network is designed circulate abstracts of research papers (both working and published papers) in all areas of social insurance, including poverty and inequality. NASI members volunteer as editors. Using member-dues revenue, NASI sponsors these journals to increase the cross disciplinary conversation about social insurance. While the journals are open to non-NASI members who subscribe, NASI provides subscriptions for all its Members to the following journals (traffic to the journals in the past year shown in parentheses):

- *Disability Income & Work Injury Compensation* (108 papers, 4,645 downloads)
- *Health Care Delivery & Financing* (950 papers, 43,391 downloads)
- *Poverty, Income Distribution & Income Assistance* (544 papers, 31,244 downloads)
- *Social Security, Pensions & Retirement Income* (945 papers, 66,087 downloads)
- *Unemployment Insurance* (301 papers, 15,752 downloads)

**Strategic Goal for Fundraising: Increase funding to support the mission & vision.**



Copies of the FY2008 Audited Financial Statements are available by contacting Pamela Larson at [plarson@nasi.org](mailto:plarson@nasi.org) or by calling 202-452-8097.

*Thank you!*

**Below is a list of the foundations, other institutions, and government agencies that have supported NASI this past year.**

**Foundations:**

The Actuarial Foundation  
The Altman Fund  
California Endowment  
California HealthCare Foundation  
Annie E. Casey Foundation  
The Century Foundation  
Ford Foundation  
Heinz Family Foundation  
Jewish HealthCare Foundation  
Henry J. Kaiser Family Foundation  
Retirement Research Foundation  
Robert Wood Johnson Foundation  
Rockefeller Foundation

**Organizations and Institutions:**

AARP  
AFL-CIO  
The Altarum Institute  
The Altman Fund  
America's Health Insurance Plans  
American Academy of Actuaries  
Amerigroup  
Center for Medicare Advocacy

**Organizations / Institutions, continued**

Economic Policy Institute  
ELM Income Group  
Global Policy Solutions, LLC  
Hebrew SeniorLife  
MetLife Foundation  
National Committee to Preserve Social Security and Medicare  
National Council of La Raza  
Ovations, United HealthCare  
Schering-Plough  
Society of Actuaries  
Summit Health Institute for Research & Education, Inc.  
Unum

**Government:**

U.S. Centers on Medicare and Medicaid Services (CMS)  
U.S. Department of Labor  
National Institute on Disability and Rehabilitation Research (NIDRR)  
Social Security Administration (SSA)

**NASI does much of its work through volunteers who are listed in Appendix A. Individuals who have donated money to NASI this past year are included as Appendix B.**

## Appendix A: List of Volunteers

### *Policy Briefings, Symposia, and Seminars*

#### **Social Security Grant-Making: Sharing the Results** *(New York City; July 2007)*

**Kenneth Apfel**

University of Maryland

**Martin Baily**

Peterson Institute

**Max Benavidez**

University of California Los Angeles

**Michael Graetz**

Yale University

**Bob Greenstein**

Center on Budget and Policy Priorities

**Heidi Hartmann**

Institute for Women's Policy Research

**Jacob Kirkegaard**

Peterson Institute

**Maya Rockeymoore**

Global Policy Solutions, LLC

**Eric Rodriguez**

National Council of La Raza

**Steve Sass**

Boston College

**Susan Scanlan**

National Council of Women's Organizations

**Margaret Simms**

Urban Institute

**Eugene Steuerle**

Urban Institute

**Jack Vanderhei**

Employee Benefits Research Institute

**Sheila Zedlewski**

Urban Institute

#### **Summer Intern Academy: Can We Afford Our Parents' and Grandparents' Retirement**

*(Washington, DC; August 2007)*

**Nancy Altman**

Independent Consultant

**Charles Brain**

Capitol Hill Strategies, LLC

**Juliette Cubanski**

Henry J. Kaiser Family Foundation

**Susan Daniels**

Daniels and Associates

**John Gist**

AARP Public Policy Institute

**Theodore Marmor**

Yale University

**Tom Miller**

American Enterprise Institute

**Marilyn Moon**

American Institutes of Research

**Sara Rix**

AARP Public Policy Institute

**Margaret Simms**

Urban Institute

**Tim Trysla**

Alston & Bird, LLP

**Reggie Williams**

Avalere Health

#### **Pittsburgh Road Show Journalist Training "Covering Pittsburgh's Aging: Boomers and Beyond** *(September 2007)*

**William J. Arnone**

Ernst & Young

**Laurel Beedon**

Consultant

**Judith Black**

Highmark Blue Cross Blue Shield

**Kelleigh Butler**

Three Rivers Investment Board

**Morton Coleman**

University of Pittsburgh

**David John**

The Heritage Foundation

**Judith Lave**

University of Pittsburgh

**Mildred E. Morrison**  
Allegheny County Area Agency on Aging  
**Bob Rosenblatt**  
National Academy of Social Insurance

**Richard Schultz**  
University of Pittsburgh Institute on Aging  
**Kate Seelman**  
University of Pittsburgh

**Creating Effective Public and Private Disability Policy: Thinking Outside the Box**  
*(December 2007)*

**Richard Balkus**  
Social Security Administration  
**Laurel Beedon**  
National Academy of Social Insurance  
**Winthrop Cashdollar**  
America's Health Insurance Plans  
**Ken Mitchell**  
UNUM  
**James Prochaska**  
University of Rhode Island  
NISH

**Margaret Simms**  
Urban Institute  
**Michael Sullivan**  
McGill University  
**Dorothy Watson**  
Consultant  
**David Wittenburg**  
Mathematica  
**Tony Young**

**Family Well-Being, Public Policy, and Economic Growth: Lessons from History and Insights for the Future** *(Brief, September 2007)*

**Jack Ebeler**  
Independent Consultant  
**Itai Grinberg**  
Skadden, Arps, Slate, Meagher, and Flom,  
LLP  
**Peter Lindert**  
University of California, Davis  
**Kimberly Morgan**

George Washington University  
**Peter Orszag**  
Congressional Budget Office  
**Rudolph Penner**  
Urban Institute  
**William Spriggs**  
Howard University

**Social Insurance Research Network Journal Editors** *(Year round)*

**Marc Baldwin**  
Washington State Employment Security  
Department  
**Patricia Dilley**  
University of Florida  
**Peter Edelman**  
Georgetown University  
**Marjorie Honig**  
Hunter College  
**William Johnson**  
Arizona State University

**Timothy Jost**  
Washington and Lee University  
**Marilyn Moon**  
American Institutes of Research  
**Timothy Smeeding**  
Syracuse University  
**Katherine Swartz**  
Harvard University  
**Edward Yelin**  
University of California, San Francisco

## *Conferences*

### **NASI's 20<sup>th</sup> Annual Conference - Getting to Universal Health Insurance Coverage** (Washington, DC; January & February 2008)

#### **Conference Co-Chairs**

**Jonathan Gruber**

Massachusetts Institute of Technology

**Marsha Lillie-Blanton**

George Washington University

**Chris O'Flinn**

ELM Income Group

#### **Speakers**

**Drew E. Altman**

Kaiser Family Foundation

**Cybele Bjorklund**

House Committee on Ways and Means

**Marsha Lillie-Blanton**

Kaiser Family Foundation

**Lawrence D. Brown**

Columbia University

**Gail C. Christopher**

W.K. Kellogg Foundation

**Christine Cassel**

American Board of Internal Medicine

**Luisa Grillo-Chope**

National Council of La Raza

**Jonathan Cohn**

The New Republic

**David Colby**

Robert Wood Johnson Foundation

**Henry Eickelberg**

General Dynamics

**Ruth Faden**

Johns Hopkins Berman Institute of Bioethics

**Christine Ferguson**

George Washington University

**Juan A. Figueroa**

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