



NATIONAL  
ACADEMY  
OF SOCIAL  
INSURANCE

FISCAL YEAR  
JULY 2011-JUNE 2012

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# WELCOME

# Welcome

Lisa Mensah, *Board Chair*

G. Lawrence Atkins, *President*

At the heart of the National Academy of Social Insurance are its members. In this year of electoral politics, public debate on core beliefs and a struggling economic recovery, NASI members engaged – many of them prominently and from a variety of perspectives – on fundamental issues of the role of social insurance programs and their demographic and financial challenges in the next decade. Academy staff reflected this diversity of views and interpretations in a wide array of publications and materials intended to provide accurate, objective information to better inform the debate.

We encourage you to thumb through this highlights report and review the innovative ways the Academy has been engaging over the past year on issues of critical importance to our country. Some of the highlights include: *A Young Person's Guide to Social Security*; briefs for state governments on how to create health insurance Exchanges under the new health care law; and the only annual report available on workers' compensation programs.



The debate is intensifying. Over the next year, NASI will increase its efforts and employ new methods to inform the debate while engaging a broader range of organizations and a broader cross-section of Americans, young and old alike, in the effort to develop consensus, construct solutions, and support the kind of change that can ensure the sustainability of social insurance programs, which contribute so much to the productivity of American workers and the health of the American economy.

The Academy's members are the core of our work. This year we accepted more than 60 distinguished new members (see page 14). We hope you will continue to support the Academy by maintaining your active membership, attending the 2013 annual policy conference, contributing your expertise, sponsoring leadership development programs, and providing new ideas and initiatives to contribute to the social insurance discussion. Here's to another year of strengthening social insurance!

# POLICY RESEARCH, EDUCATION, & COMMUNICATIONS

# Income Security Policy

NASI's work in income security policy encompasses research, analysis, public outreach and education across Social Security, Workers' Compensation, and Unemployment Insurance. During fiscal year 2011- 2012, NASI worked with groups throughout the nation to empower those most reliant on Social Security to have their voices heard in Social Security policy debates. NASI continues to be the only source of comprehensive national data on workers' compensation payments. As long-term joblessness continues, NASI took a careful look at unemployment insurance programs – analyzing problems and potential solutions to strengthen the system's finances.



***Improving the Lives of Vulnerable Americans through Social Security: A public education project that awarded funds to 29 organizations to educate vulnerable communities about Social Security.***

With support from the Ford Foundation, NASI concluded its final round of awarding funds to organizations for projects that educate Americans most reliant on Social Security about its role in their economic security. The project supported constituency building, education outside of Washington, DC, and the development of user-friendly, research-based information on the adequacy of Social Security benefits and how they could be strengthened for vulnerable groups, including communities of color, women, people with disabilities, low-wage workers, and children. In light of rising out-of-pocket medical costs, declining asset values and ongoing job losses, it is more important than ever that groups most reliant on Social Security have their voices heard in policy debates about its future. The project demonstrated the tremendous importance — and impact — of public education around Social Security (see graphic at left).

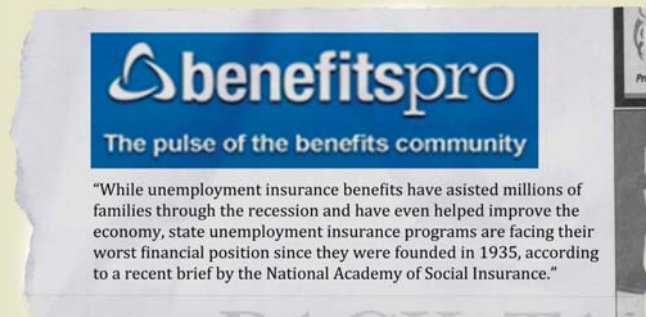






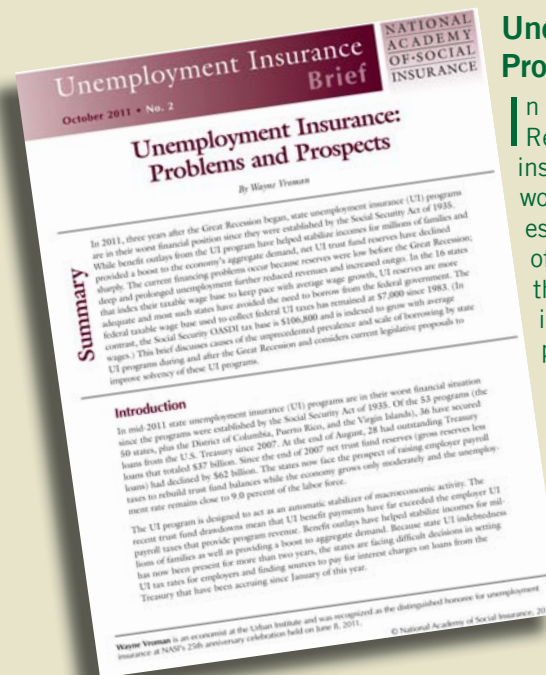
## Workers' Compensation: Benefits, Coverage, and Costs

This report is the fourteenth in a series that offers the only comprehensive nationwide data on this largely state-run program. The study provides estimates of workers' compensation payments—cash and medical—for all 50 states, the District of Columbia, and the federal program providing workers' compensation. In 2009, the number of workers covered by workers' compensation dropped by 4.4 percent, the biggest decrease in two decades.



## Unemployment Insurance: Problems and Prospects

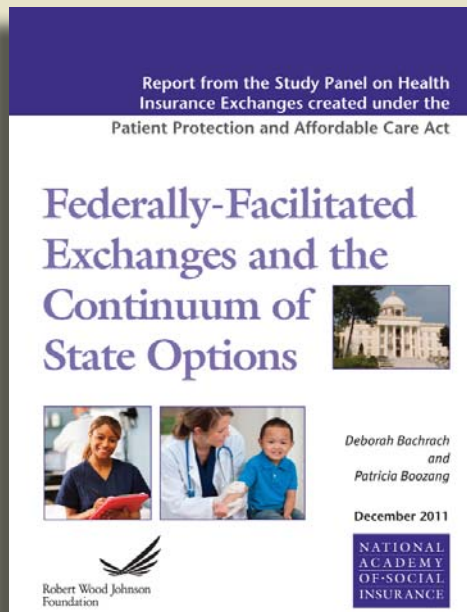
In 2011, three years after the Great Recession began, state unemployment insurance (UI) programs were in their worst financial position since they were established by the Social Security Act of 1935. While benefit outlays from the UI program had helped stabilize incomes for millions of families and provided a boost to the economy, net UI trust fund reserves had declined sharply. This brief discusses causes of the unprecedented prevalence and scale of borrowing by state UI programs during and after the Great Recession and considers current legislative proposals to improve the solvency of these programs.





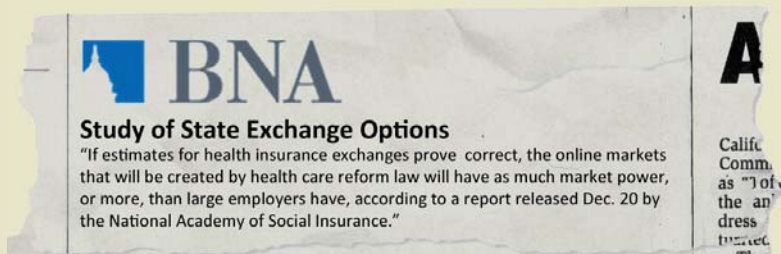
# Health Policy

NASI's health policy work focuses on guiding federal and state policymakers and other stakeholders in understanding how social insurance fits into the policy landscape. During fiscal year 2011-2012, NASI completed a major initiative with the Robert Wood Johnson Foundation to help state officials implement health insurance Exchanges. Products include a toolkit offering legislative language for policymakers implementing Exchanges, and issue briefs on Exchange governance, active purchasing, federally-facilitated Exchanges, coordination between Medicaid and the Exchange, and plan management.



## Federally-Facilitated Exchanges and the Continuum of State Options

This report gives states and stakeholders a first look at models for health insurance Exchanges authorized by the Affordable Care Act (ACA). The report explores the continuum of Exchange options, from entirely state-operated to entirely federally-operated, and examines the implications for states in selecting various models in terms of Exchange functions and operations. States face complex challenges in balancing their desire for autonomy with the opportunity to rely on federal solutions for new responsibilities required of all Exchanges. This report suggests how the core functions of the Exchange might be effectuated in state-based, federally-facilitated and partnership exchange models and the legal, operational and fiscal implications of each. The core functions addressed are eligibility, enrollment, plan management, consumer assistance, and financial management.





## Medicare Finances: Findings of the 2012 Trustees Report

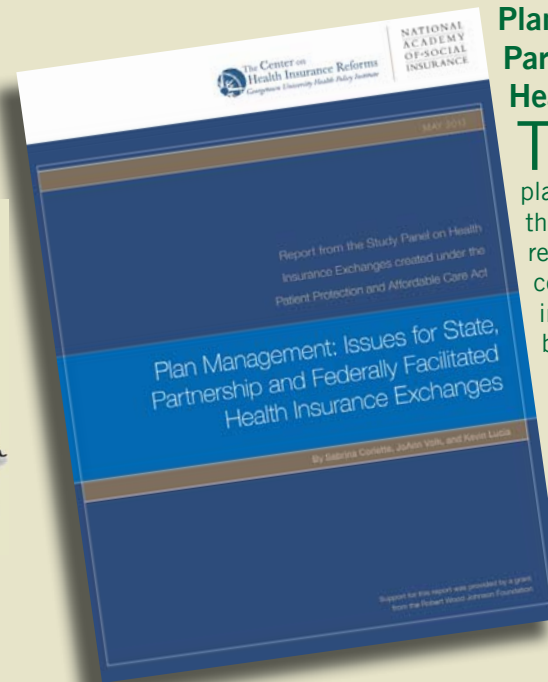
Each year, the Medicare Trustees give a detailed account of the expected condition of the program's two trust funds over the short and long term. This report provides a brief summary of the Medicare Trustees report, highlighting the key changes in the finances of the two trust funds: the Hospital Insurance (HI) Trust Fund (which pays for Part A benefits) and the Supplementary Medical Insurance (SMI) Trust Fund (which pays for Part B and Part D benefits). The report discusses new findings for the HI Trust Fund, changes to the year in which the program exhausts reserves, and comparisons with past reports.

## HealthAffairs Blog

### A Closer Look At The Medicare Trustees' Report

by Lee Goldberg, National Academy of Social Insurance

"The latest report from Medicare's trustees, released yesterday, drives home what many already know: Medicare possesses a serious long-term budgeting challenge. But a close look at the report also suggests that, while reforms and savings are clearly needed in the Medicare program, it would also be worthwhile and realistic to look at options for increasing revenues to protect the welfare of vulnerable beneficiaries."



## Plan Management: Issues for State, Partnership and Federally Facilitated Health Insurance Exchanges

This report is the first to review how state and federal regulators currently perform plan management activities and assess how those activities are likely to change as a result of the ACA. Such activities include confirming a plan's "good standing," assessing network adequacy, reviewing rates and benefits, regulating marketing practices, improving quality, and conducting ongoing compliance monitoring. The report concludes that certifying and managing health plans in the Exchange will require far greater collaboration across state agencies and with the federal government.

## POLITICO

### ENLARGING, BUT NOT REINVENTING, THE REGULATORY WHEEL

"States will have to expand regulation of health plans in 2014, both in terms of "upfront review," and to make sure a plan is "qualified," and ongoing oversight, to make sure the plan lives up to the exchange standards, according to a new report from Georgetown's Center of Health Insurance Reforms and the National Academy of Social Insurance."

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# Social Insurance in a Market Economy: Obstacles and Opportunities

## 24<sup>th</sup> Annual Policy Research Conference

January 26-27, 2012, Washington, DC

Over 250 people participated in NASI's 24<sup>th</sup> annual policy conference, including: policy analysts, advisors, and researchers; educators; business and industry leaders; workers and their representatives; journalists; legislative staff at the federal, state, and local levels; program administrators; and advocates and grassroots organization leaders. Reflecting how the nation continued to face complex economic challenges in a presidential election year, the conference program focused on examining the critical role of social insurance in contributing to a vibrant and sustainable economy that serves all Americans. Keynote speakers and panelists led a robust dialogue to further understand how a strong, competitive economy requires innovative social insurance programs – and vice versa.



Jake Jones, Vice President of External Affairs and Policy for Daimler North America, discusses why large employers need social insurance.



Nancy Amidei, NASI Member, poses a question during the Q&A following a panel session.



Drew Westen, Emory University and Westen Strategies, LLC, delivers a luncheon keynote on "Messaging Social Insurance: Reframing the Debate."



Hilary Doe, Senior Advisor at the Roosevelt Institute, contributes her expertise to a discussion.



Over 250 people participate in the conference held at the National Press Club.



Conference Co-Chair Margaret Simms moderates a panel discussion that explores "Remedies for a Labor Market in Distress."

# Social Insurance in a Market Economy: Obstacles and Opportunities

## 24<sup>th</sup> Annual Policy Research Conference

January 26-27, 2012, Washington, DC

Questions and themes explored during NASI's two-day conference included:

- Why do the business community and social insurance need each other? What needs to be done to make both stronger?
- Breakthrough opportunities to promote higher quality healthcare at lower cost.
- Almost two years after enactment: What's gone right or wrong with implementing the ACA? What comes next in implementation?
- What else can we do to promote health security? What underlying values drive the quest for improved health security?
- What is the nature and extent of the current jobs crisis, and how can we improve opportunities for workers of all ages?
- Do we need to rethink unemployment insurance? Training and retraining? How can we pay for it?
- How can we improve our messaging on social insurance?
- How can Social Security benefits be made more adequate to meet 21st century needs? Can fresh strategies produce the additional revenues Social Security will need?



Henry Aaron, who first coined the term “premium support” in the 1990s, and Alice Rivlin, co-author of the Domenici-Rivlin plan, which proposes to convert Medicare into a premium support system, lead a robust debate during a roundtable session.



Donald M. Berwick, former Administrator of the Centers for Medicare and Medicaid Services, gives a keynote address on “The Search for Health Security.”



Robert Berenson, Institute Fellow at the Urban Institute, speaks on the role of Medicare in “Health Care: The Quest for Higher Quality at More Affordable Cost.”



# LEADERSHIP DEVELOPMENT



## Social Security & Medicare Academies

NASI hosted two summer intern academies where hundreds of interns, students, and young professionals came together for free, day-long events to learn the ins and outs of Social Security and Medicare. They heard from prominent guest speakers and expert panelists, and participated in interactive activities including a hands-on policy exercise on the future of these programs.



*"Thanks to my NASI internship, I realize the importance in having a strong foundation in public policy."*

-2012 NASI Somers Intern

*"I believe that I can have an intelligent conversation in discussions surrounding social insurance programs. I can apply this knowledge in my academics as well as my career."*

-2012 NASI Washington Intern



*"One of the most rewarding parts of the summer was being a part of a cohort of great interns."*

-2012 NASI Nathan J. Stark Intern



*"The seminars were useful in teaching core components of key social insurance programs. I can now analyze the benefits or disadvantages of proposed reform options."*

-2012 NASI Eileen Sweeney Intern

## 2012 NASI Summer Interns



Every summer, NASI offers a select number of nationally-competitive paid internships for students interested in careers in social insurance policy. NASI welcomed 23 outstanding interns from schools all over the country. Interns were placed with organizations across the DC metro area such as AcademyHealth, Generations United, Global Policy Solutions, Alliance of Community Health Plans, Center for Medicare Advocacy, Congressional Research Service, Senate Special Committee on Aging, U.S. Department of Health & Human Services, and others, all with a NASI member mentor. Interns attended weekly seminars on topics ranging from unemployment insurance and workers' compensation to Medicare and health reform and heard from NASI member experts in their respective fields. They also served as facilitators at NASI's intern academies.

2012 NASI summer interns (from left to right): first row: Anne Cleary, Andrea Taverna, Norma Herrera, Krista Simeone, Marius Kothor; second row: Sarah Gonzaga, Elizabeth Blair, Halley Brunsteter, Jena Grady, Jess Liu, Ami Wazlawik, Chidi Ahaghotu; third row: Tina Liu, Thang Nguyen, Brittany Reid, Alicia Atkinson, Theresa Eugene, Talib Jabbar; top row: Tessa Conroy, Michael Wodka, and Tom Arnold-Forster.



# MEMBERS & SUPPORTERS

The core of NASI's strength is its membership. NASI accepted 62 distinguished new members\* in FY 2011-2012, bringing the total active membership to over 900.

**Edward J. Abes**, Abes Bauman, P.C.  
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**Anne Dunkelberg**, Center for Public Policy Priorities  
**Lisa Ekman**, Ekman Advocates for Progress, LLC; Health & Disability Advocates  
**Sheila Everett**, Social Security Administration  
**Richard Fiesta**, Alliance for Retired Americans  
**Walt Francis**, Economist and Policy Analyst  
**Lynn Franzoi**, LLF Consulting

**Monica Galizzi**, University of Massachusetts-Lowell, Department of Economics  
**Michael Glancy**, The Law Offices of Kathleen Shannon Glancy, P.A.  
**Chris Godfrey**, State of Iowa, Division of Workers' Compensation  
**Ellen Golombek**, Colorado Department of Labor and Employment  
**Larry Good**, U.S. Department of Labor, ERISA Advisory Council  
**Erica Hagensen**, The Arc of North Carolina  
**Charles Hall**, Charles T. Hall Law Firm, P.C.  
**Kevin Hassett**, American Enterprise Institute  
**Brent Hatch**, Texas Department of Insurance, Division of Workers' Compensation  
**Jim Hearn**, U.S. Senate Budget Committee  
**Bradley Herring**, Johns Hopkins Bloomberg School of Public Health  
**Heather Howard**, Princeton University, State Health Reform Assistance Network  
**Thomas Kahn**, U.S. House Budget Committee  
**David Lehrer**, U.S. Government Accountability Office  
**Dennis Mealy**, National Council on Compensation Insurance, Inc.  
**Brandon Miller**, U.S. Department of Labor, Long-shore Division  
**Richard D. Miller**, U.S. House of Representatives, Committee on Education & the Workforce  
**Leticia Miranda**, National Council of La Raza  
**Michael Okun**, Patterson Harkavy LLP  
**Jason Olsen**, U.S. Department of Labor, Office of Disability Employment Policy

**Bernyce Peplowski**, California State Compensation Insurance Fund  
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**David Riemer**, Community Advocates Public Policy Institute  
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**Seth Seabury**, RAND Corporation  
**Ellen Shaffer**, Center for Policy Analysis  
**Alison Shelton**, Congressional Research Service  
**Barbara Silverstein**, Safety & Health Assessment & Research for Prevention, Washington State Department of Labor and Industries  
**Laura Summer**, Georgetown University Health Policy Institute  
**Ramona Tanabe**, Workers' Compensation Research Institute  
**Jessamy Taylor**, George Washington University, National Health Policy Forum  
**Carol Telles**, Workers' Compensation Research Institute  
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**Reginald Williams**, Avalere Health  
**Joy Wilson**, National Conference of State Health Legislatures (NCSHL)  
**Barbara Wynn**, RAND Corporation  
**Robert Yee**, Department of Health & Human Services

*\*Affiliation at the time of election to NASI.*

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Katherine Swartz  
Kathleen Elliott Yinug

# Robert M. Ball Award

## June 20, 2012, Washington, DC

NASI presented the *2012 Robert M. Ball Award for Outstanding Achievements in Social Insurance* to Robert D. Reischauer, president emeritus of the Urban Institute and a founding member of NASI. In celebration of NASI's founder, Robert M. Ball, Commissioner of Social Security (1962-1973), this award is given each year to an individual who has made significant contributions to strengthening social insurance for Americans. Throughout his prolific career, Bob Reischauer, like Bob Ball, brought people together. Bob Reischauer's leadership – from directing the Congressional Budget Office to serving as president of the Urban Institute – has empowered decision-makers with the necessary knowledge to maintain the strong social insurance system on which all Americans rely.



NASI Board Chair Lisa Mensah presents the 2012 Robert M. Ball Award to Robert D. Reischauer.



Doug Elmendorf, Director of the Congressional Budget Office (CBO), cites Bob Reischauer's impact as former Director of the CBO.



Congressman Barney Frank, Ranking Member, House Committee on Financial Services, praises Bob Reischauer.



Senator Pete V. Domenici, Former Chairman, Senate Budget Committee, and Former Chairman, Senate Energy Committee, honors NASI's awardee.



The Ball Award Event Committee was co-chaired by Henry Aaron and Bill Hoagland. The 2012 Nominating Committee was chaired by John Rother, winner of the 2010 Ball Award.



The event draws guests from all areas of social insurance.



Robert Solow, 1987 Nobel Laureate in Economics, contributes reflections.

# About NASI

**VISION:** Social insurance plays an important role in a fair and just society that supports a strong democracy and a vibrant economy.

**MISSION:** To advance solutions to challenges facing the nation by increasing public understanding of how social insurance contributes to economic security.

## STRATEGIC GOALS:

- Inform and focus the policy debate by examining critical issues in social insurance and producing policy analyses, research briefings, and synthesis products.
- Broadly engage Academy members and other experts in collaborative work and interdisciplinary leadership.
- Develop future leaders in the field of social insurance.
- Position NASI as the “go-to” resource for information about social insurance and its role in society.
- Sustain and build resources to increase NASI’s capacity to accomplish its mission.

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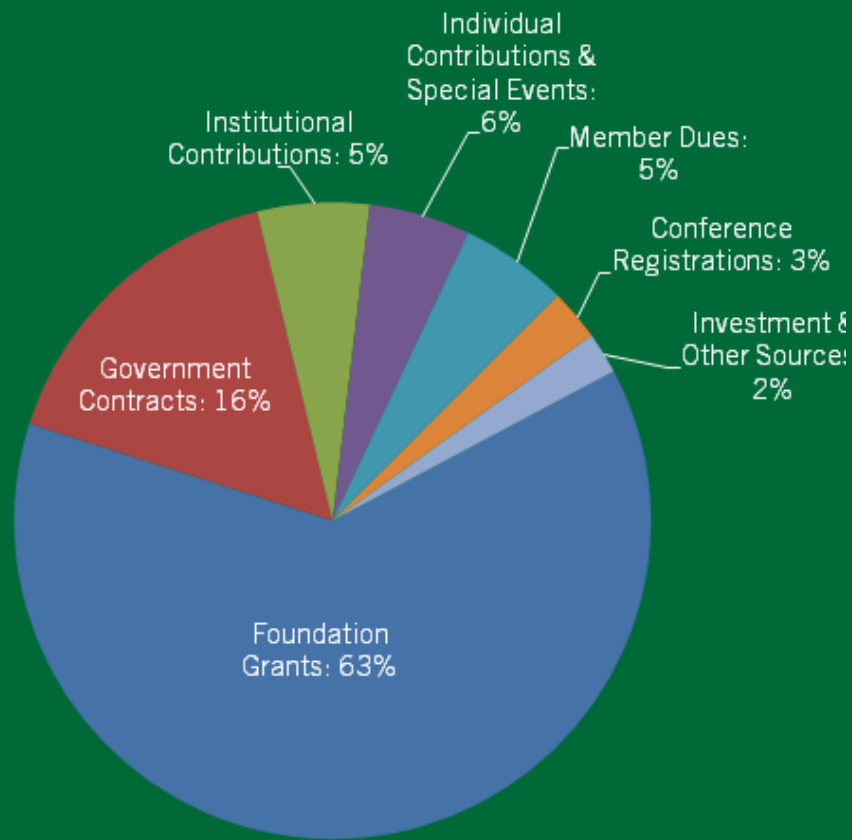
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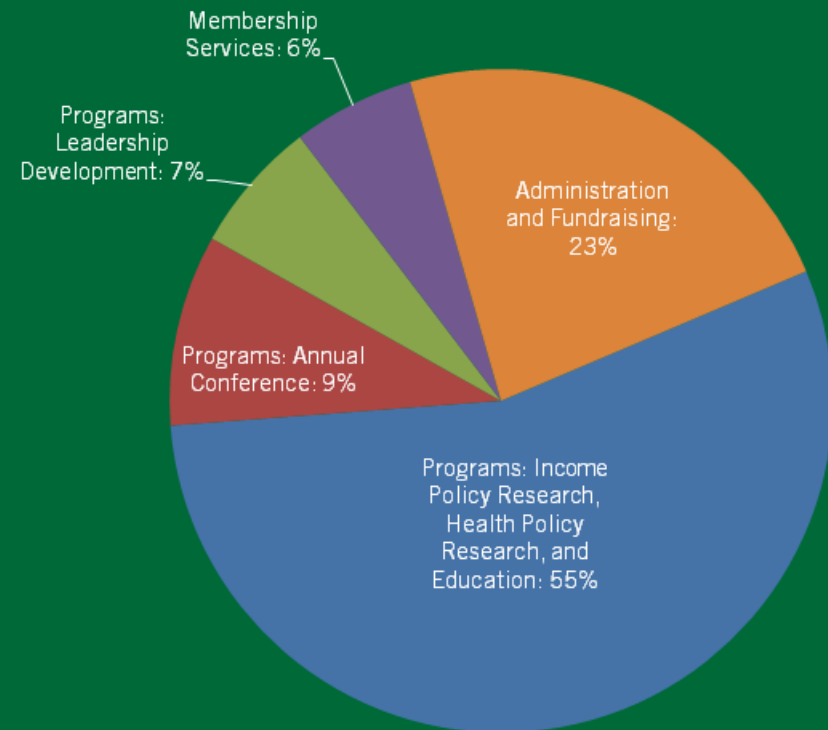
# MANAGEMENT & OPERATIONS

## Where does NASI's funding come from?



In FY 2012, NASI received support from a variety of sources. The majority of funding for NASI's programs (63%) comes from multi-year grants from major foundations and from government contracts. A large portion of institutional and individual contributions supports NASI's leadership development programs and special outreach and education initiatives. Unrestricted funds earned from special events, as well as membership dues, support strategic planning and provide seed funding for the launch of new projects.

## How does NASI utilize its resources?



With a budget of approximately \$2.2 million in FY 2012, over three quarters of NASI's expenditures were for programs and membership services. The fundraising climate for nonprofits continues to be highly competitive, which required an increase in administration and fundraising expenses compared with FY 2011. FY 2012 also saw an increase in spending for membership services and the annual conference in line with member engagement priorities. Finally, expenditures for leadership development rose to accommodate increased participation of well-qualified and motivated students from across the country and the world.

# Support NASI

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 much.

## **Visionary (\$1,000 and above)**

Your contribution enables NASI to engage in strategic planning for long-term impact on public policymaking 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.

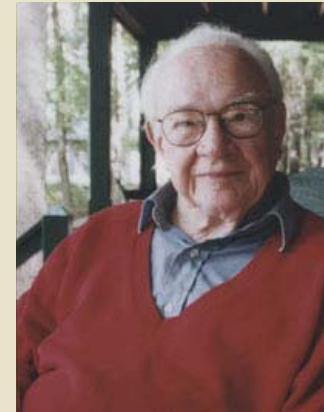
## **Strategist (\$500 and above)**

Your contribution enables NASI to develop ideas and recommendations from Academy members for new research and education projects that yield social insurance policy and implementation strategies for today and for the future.

## **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.

Visit **WWW.NASI.ORG** for  
more donation opportunities.



NASI Founder Robert M. Ball

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