

3 | H A R K I N 2 | RETIREMENT 0 | SECURITY 2 | SYMPOSIUM

Preserving and Enhancing Social Security for All



Wednesday, September 13 | Washington D.C.

Symposium Panels

Panel One—Restoring Social Security to Long Range Balance

Bill Arnone, Chief Executive Officer, National Academy of Social Insurance [Moderator]

Nancy Altman, President, Social Security Works

Richard Fiesta, Executive Director, Alliance for Retired Americans

Monique Morrissey, Senior Economist, Economic Policy Institute

Kathleen Romig, Director of Social Security and Disability Policy, Center on Budget and Policy Priorities

Panel Two—Targeted and Across-the-Board Expansions to Improve the Economic Security of Working Families

Richard Johnson, Director, Program on Retirement Policy, The Urban Institute [Moderator]

Andrew D. Eschtruth, Associate Director for External Relations, Center for Retirement Research, Boston College

Teresa Ghilarducci, Irene and Bernard L Schwartz Professor of Economics and Policy Analysis, The New School for Social Research

Cindy Hounsell, President, Women's Institute for a Secure Retirement

Panel Three—Public Opinion on Social Security Reform and Legislative Agenda

Max Richtman, President and CEO, National Committee to Preserve Social Security and Medicare [Moderator]

Fay Lomax Cook, Professor Emerita of Human Development and Social Policy and Director Emerita, Institute for Policy Research, Northwestern University, and Distinguished Visiting Fellow, National Academy of Social Insurance

Mathew Greenwald, Founder & Managing Director, Strategic Initiatives, Greenwald Research

Nancy LeaMond, Executive Vice President and Chief Advocacy & Engagement Officer, AARP

Panel Four—The Status of Older Workers: Early Retirement and SSDI

Laura Haltzel, Senior Fellow, The Century Foundation [Moderator]

Barbara Bovbjerg, Chair, NASI Older Workers Retirement Security Task Force and former Managing Director, Education, Workforce, and Income Security, Government Accountability Office

David Camp, Interim CEO, National Organization of Social Security Claimants' Representatives

Jeff Cruz, Legislative Representative, American Federation of Government Employees

Rebecca Vallas, Senior Fellow and Co-Founder of the Disability Economic Justice Collaborative, The Century Foundation

Symposium Agenda

8:30 a.m.	Opening Remarks Matthew Reed, Executive Director, The Harkin Institute Rayna Stoycheva, Retirement Security Policy Director, The Harkin Institute
8:40 a.m.	Morning Keynote Stephen Goss, Chief Actuary, Social Security Administration
9:00 a.m.	Panel One
10:15 a.m.	Break
10:30 a.m.	Panel Two
11:45 a.m.	Lunch
12:30 p.m.	Harkin Retirement Security Awards Presented by Senator Tom Harkin (retired)
12:45 p.m.	Lunch Keynote Rep. John Larson, Minority Chair, The U.S. House Subcommittee on Social Security
1:15 p.m.	Panel Three
2:15 p.m.	Break
2:30 p.m.	Panel Four
3:45 p.m.	Closing Remarks



Symposium Speakers



Nancy J. Altman
President, Social Security Works

Nancy J. Altman is President of Social Security Works and chair of the Strengthen Social Security coalition. Democratic House Leader Nancy Pelosi appointed Ms. Altman to the Social Security Advisory Board. The Board is a bipartisan, independent federal government agency established in 1994 to advise the President, Congress, and the Commissioner of Social Security.

Ms. Altman is the author of *The Battle for Social Security: From FDR's Vision to Bush's Gamble* (John Wiley & Sons, 2005) and *The Truth About Social Security: The Founders' Words Refute Revisionist History, Zombie Lies, and Common Misunderstandings* (Strong Arm Press, 2018). She is also co-author of *Social Security Works! Why Social Security Isn't Going Broke and How Expanding It Will Help Us All* (The New Press, 2015).

From 1983 to 1989, Ms. Altman was on the faculty of Harvard University's Kennedy School of Government and taught courses on private pensions and Social Security at the Harvard Law School. In 1982, she was Alan Greenspan's assistant in his position as chairman of the bipartisan commission that developed the 1983 Social Security amendments. From 1977 to 1981, she was a legislative assistant to Senator John C. Danforth (R-Mo) and advised the Senator with respect to Social Security issues. From 1974 to 1977, she was a tax lawyer with Covington & Burling, where she handled a variety of private pension matters.

Ms. Altman chairs the Board of Directors of the Pension Rights Center and is a member of the Boards of Directors of the Alliance for Retired Americans Educational Fund, Latinos for the Secure Retirement, and the Institute for America's Future. In the mid-1980's, she was on the organizing committee and the first board of directors of the National Academy of Social Insurance.

Ms. Altman has an A.B. from Harvard University and a J.D. from the University of Pennsylvania Law School.



William J. Arnone
Chief Executive Officer, National Academy of Social Insurance

William J. Arnone is Chief Executive Officer of the National Academy of Social Insurance. As a Partner with Ernst & Young LLP for 15 years up to 2009, he was responsible for the strategic positioning, design, management, marketing, and thought leadership of retirement and financial education and counseling in employer-sponsored programs.

Prior to joining Ernst & Young, Mr. Arnone was Principal, Benefit Consultant, and National Director of Financial & Retirement Planning Services for Buck Consultants, Inc. (now part of Xerox). He joined Buck in 1981 after serving as Director, Senior Security Services, for the New York City Department for the Aging. He also served as Consultant on Employment of Older Workers for the Florence V. Burden Foundation in New York. He previously was Executive Director of Helping Aged Needing Direction in the Bronx. He also served as a staff associate with the New York City Board of Correction.

Mr. Arnone is co-author of *Ernst & Young's Retirement Planning Guide* (John Wiley & Sons, Inc., 2001). He is an Associate Editor of *The Columbia Retirement Handbook* (Columbia University Press, 1994). He is a Founding Board Member of the Academy and served on the Academy's Board of Directors from 1986 to 1994. He served as the Chair of the Academy's Board of Directors from 2013 to 2016. He co-chaired the Academy's 2010 conference, "Beyond the Bad Economy," and has served on the Academy's Strategic Planning Committee and chaired its advisory committee for Ford Foundation organizational awards to enable the voices of vulnerable segments of the U.S. population to participate effectively in the debate on the future of Social Security.

He has a J.D. from New York University Law School. He was selected as one of the first Charles H. Revson Fellows on the Future of New York City by the Columbia University School of Business for 1979-1980.



Barbara Bovbjerg

Chair, NASI Older Workers Retirement Security Task Force and Managing Director, Education, Workforce, and Income Security, GAO (Retired)

Barbara Bovbjerg recently retired as the Managing Director for Education, Workforce, and Income Security Issues at the U.S. Government Accountability Office. For more than 10 years she oversaw all GAO’s evaluative work in those subject areas, ranging from elementary and secondary education, through workforce, employment, and disability issues, to aging and retirement income policy.

Previously Ms. Bovbjerg was the Director for Retirement Income Security. In that capacity she managed studies on Social Security and pension policy and management. Earlier, as Assistant Director for Budget Issues at GAO, she managed a variety of budget policy projects, including studies on the long-term effects of budget deficits. Before joining GAO, she led the citywide analysis unit of the District of Columbia’s Budget Office and analyzed state and local government finance issues for the Urban Institute.

Ms. Bovbjerg is a member of the National Academy of Public Administration and the National Academy of Social Insurance and is a member of the United Planning Organization Board of Directors. She has a master’s degree in public policy from Cornell University and a B.A. from Oberlin College.



David Camp

CEO, NOSSCR Foundation, and Interim CEO, National Organization of Social Security Claimants’ Representatives

David Camp is CEO of the NOSSCR Foundation and Interim CEO of NOSSCR. He served as President of NOSSCR from 2021 to 2023, leading a transition to a focus on advocacy with a move to Washington DC. He has been practicing Social Security law for 25 years, representing claimants administratively and in federal courts in the 6th, 7th, and 8th federal circuits. For much of that time, he owned Access Disability—a Social Security law firm in St. Louis focusing on representation of the homeless.

Previously, Mr. Camp clerked for Judge Richard Teitelman of the Supreme Court of Missouri. He also worked as the Managing Attorney for Gateway Legal Services (a legal aid program), and in the litigation department of Stone, Leyton & Gershman. He has a B.S. in mathematics from the University of Wisconsin—Madison and a J.D. from Washington University in St. Louis.

Mr. Camp founded and served for many years as Chair of the Administrative Law Committee of the Bar Association of Metropolitan St. Louis and is a Past President of the Missouri Lawyers Trust Account Foundation. He is a recipient of the Social Security Region 7 Commissioner’s Public Service Award for training SSA staff, and the NOSSCR Sweeney award for Distinguished Service for his work litigating an end to the Secret ALJ Policy. He is a member of the Editorial Advisory Committee for West’s Social Security Reporting Service and the author of “Current Social Security News” and “Social Security Claims and Procedures” for Westlaw.



Fay Lomax Cook

Professor Emerita of Human Development and Social Policy and Director Emerita, Institute for Policy Research, Northwestern University, and Distinguished Visiting Fellow, National Academy of Social Insurance

Fay Lomax Cook is Professor Emerita of Human Development and Social Policy and Director Emerita of the Institute for Policy Research (IPR) at Northwestern University. Currently, she is the Distinguished Visiting Fellow at the National Academy of Social Insurance. From 2014 to 2018, she headed the Directorate for Social, Behavioral & Economic Sciences (SBE) at the National Science Foundation (NSF). Her research focuses on the interrelationships between public opinion and social policy, the politics of public policy, public deliberation, and the dynamics of public and elite support for social programs, particularly programs for older Americans such Social Security.

Ms. Cox is the author of many scholarly articles and book chapters as well as five books, including Talking Together: Public Deliberation and Political Participation in America (University of Chicago Press). She is past president of the Gerontological Society of America and an elected member of the National Academy of Social Insurance and fellow of the Gerontological Society of America. She has been a fellow at the Center for Advanced Study in the Behavioral Sciences and a visiting scholar at the Russell Sage Foundation. Ms. Cox served as co-chair for the White House National Science and Technology Council’s interagency Social and Behavioral Sciences Subcommittee of the Committee on Science and as co-chair of the Federal interagency committee to assess research needs related to the nation’s opioid crisis.



Jeff Cruz

Legislative Representative, American Federation of Government Employees

Jeff Cruz is a Legislative Representative with the American Federation of Government Employees (AFGE), the largest federal workers union in the United States, where among other issues he handles retirement security issues for federal workers and runs AFGE's retiree program.

Mr. Cruz has worked on Capitol Hill for nearly 15 years, including most recently handling retirement security issues for Senators Bernie Sanders and Elizabeth Warren, and on the Senate Committee on Aging for retired Senator Herb Kohl. He also has extensive advocacy experience, including with Americans United to Protect Social Security and as the Executive Director of the Latinos for a Secure Retirement coalition. Mr. Cruz has worked on electoral campaigns in dozens of states, including as the Deputy National Senior Vote Director in the 2008 Obama presidential campaign.

He has a bachelor's degree from the University of Illinois at Urbana-Champaign, a master's degree from the Harvard Kennedy School of Government, and was elected to represent Washington DC as a Bernie Sanders delegate at the 2016 National Convention. Mr. Cruz is also a member of the National Academy of Social Insurance.



Andrew Eschtruth

Associate Director for External Relations, Center for Retirement Research, Boston College

Andrew Eschtruth is associate director for external relations at the Center for Retirement Research at Boston College. He directs the center's communication activities, including publications, press relations, and social media. Mr. Eschtruth also manages relationships with the government and corporate communities and speaks to a variety of audiences on retirement topics. He is a co-author (with Charles D. Ellis and Alicia H. Munnell) of *Falling Short: The Coming Retirement Crisis and What to Do About It* (Oxford University Press, 2014).

Before joining the Center in 1999, he was a senior research analyst with the U.S. Government Accountability Office (GAO) specializing in Social Security, federal fiscal policy, and the economic implications of an aging population. While at the GAO, Mr. Eschtruth served on a special assignment as an aide to the Chair of the Senate Finance Committee.

Mr. Eschtruth is a member of the National Academy of Social Insurance. He has a B.A. from the University of Michigan and a master's in public policy from Duke University.



Richard Fiesta

Executive Director, Alliance for Retired Americans

Richard Fiesta is the Executive Director at the Alliance for Retired Americans, a national grassroots advocacy organization with 4.4 million members that works to protect the health and economic security of retirees and older Americans. An expert in retirement security issues, including Social Security, Medicare, pensions and health care, Mr. Fiesta is often called upon for views and analysis by national and regional media outlets including The New York Times, The Wall Street Journal, and USA Today.

Mr. Fiesta has been the Executive Director of the Alliance since 2013 and first joined the Alliance as its Director of Government and Political Affairs in 2001. He is a member of the National Academy of Social Insurance.

Earlier in his career, he worked in both the executive and legislative branches of government, serving at the Departments of Labor and Interior as well as the Pension Benefit Guaranty Corporation. He was counsel to the U.S. House of Representatives Subcommittee on Labor Standards, legislative counsel to Senator Harris Wofford (D-PA), and communications director to Senator Barbara Mikulski (D-MD). He also practiced law, specializing in labor and retirement issues. He received his bachelor's, master's and law degrees from Georgetown University and pursued advanced study in American legal history at the University of Virginia.



Stephen C. Goss
Chief Actuary, Social Security Administration

Steve Goss has been Chief Actuary at the Social Security Administration since 2001. He has worked closely with agencies throughout the Executive Branch, members, Committees, and Commissions in the Congress, FASAB, and AGA, academic researchers, and private institutions in areas related to pension, disability, and survivor protection as well as health insurance and long-term-care insurance.

He is a member of the Society of Actuaries, the American Academy of Actuaries, and the National Academy of Social Insurance.



Teresa Ghilarducci, Ph.D.
Irene and Bernard L Schwartz Professor of Economics and Policy Analysis, The New School for Social Research

Dr. Teresa Ghilarducci is a labor economist and nationally recognized expert in older worker labor markets and retirement security. She is the Bernard and Irene L Schwartz Chair of Economic Policy Analysis at the New School for Social Research and director of the Schwartz Chair of Economic Policy Analysis. Her forthcoming book from University of Chicago Press, *Work, Retire, Repeat: The Uncertainty of Retirement in the New Economy*, unpacks the economic myths about the positive effects on health, wealth, and productivity of working longer and offers a political economy defense of the affordability and social desirability of adequate pensions and a dignified retirement. She is the author of five other books and coauthor and editor of three others.

Dr. Ghilarducci continues to advise policy makers to create pension plans, a version of Guaranteed Retirement Accounts (GRAs) to supplement Social Security for all Americans. The U.S. Government Accountability Office (GAO) identified GRAs as one alternative to overhaul the U.S. retirement system.



Mathew Greenwald, Ph.D.
Founder & Managing Director, Strategic Initiatives, Greenwald Research

Dr. Mathew Greenwald is the Founder and Managing Director of Strategic Initiatives of Greenwald Research, a market research firm, founded in 1985, that specializes in retirement, life insurance, employee benefits, and other financial services issues. Dr. Greenwald was a Congress-appointed delegate to the 1998 and 2002 National Summits on Retirement Savings. He has published numerous articles on retirement issues. He is an elected member of the Market Research Council, a group of the country's leading market researchers. He is the only market researcher in the Insured Retirement Institute's Annuity Hall of Fame.

Dr. Greenwald's firm has worked with the Employee Benefit Research Institute to conduct the Retirement Confidence Survey, which has annually monitored American's attitudes toward retirement since 1991. Greenwald Research was a member of a Financial Literacy Center funded by the Social Security Administration and worked with researchers from the University of Pennsylvania, Dartmouth College, RAND, the University of Illinois, and others to conduct research on how to help Americans make better decisions on retirement related issues. He has also directed numerous studies for the Society of Actuaries.

Prior to founding Greenwald Research, Dr. Greenwald spent 12 years at the American Council of Life Insurers. From 1977 to 1985, he was ACLI's Director of Social Research and was responsible for programs monitoring public attitudes toward financial services issues, demographic research, and futures research.

Dr. Greenwald has a Ph.D. in sociology from Rutgers University.



Laura Haltzel
Senior Fellow, The Century Foundation

Laura Haltzel is a senior fellow with The Century Foundation, where she focuses on ensuring retirement income security for all Americans. Ms. Haltzel has 25 years of experience producing politically sensitive, analytically rigorous, nonpartisan policy and research reports on retirement security issues for clients in the U.S. Congress, Social Security Administration (SSA), and Office of Management and Budget (OMB). Ms. Haltzel joins TCF after nearly five years as the research manager for the Income Security Section at the Congressional Research Service (CRS). In this capacity, she led a team in the development of Congressional reports in a portfolio that included Social Security, Supplemental Security Income, pensions, retirement security, household savings, Unemployment Compensation, Workers' Compensation, and Veterans Disability Benefits.

Ms. Haltzel has deep expertise in Social Security policy. She has served as an advisor to both the Social Security Administration's Retirement and Disability Research Consortium and the Social Security Advisory Board. Her leadership roles at SSA included work as deputy associate commissioner for the Office of Data Exchange and Policy Publications. She previously served as SSA's deputy associate commissioner for the Office of Retirement Policy (ORP), ORP's director of the Office of Policy Research, and as a social science research analyst. Due to her expertise in certain policy issues, as well as prior Congressional experience, she frequently represented SSA in formal meetings with Congressional staff and members. In her ORP management roles, she developed a research agenda that focused on economically vulnerable groups, increased Congressional and OMB outreach and consumption of ORP research products, and developed new research products that were more accessible and policy relevant to internal and external SSA customers. As an Analyst, Ms. Haltzel co-chaired SSA's Legislative Development Team responsible for developing and recommending policy proposals to the commissioner for submission to OMB.

Ms. Haltzel has a master's of public policy degree from Duke University and a B.A. in international relations and Hispanic studies from Connecticut College.



Senator Tom Harkin (retired)

In 1974, Tom Harkin was elected to Congress from Iowa's Fifth Congressional District. In 1984, after serving 10 years in the U.S. House of Representatives, Senator Harkin challenged an incumbent senator and won. Iowans returned him to the Senate in 1990, 1996, 2002, and 2008. Senator Harkin made history by becoming the first Iowa Democrat to win a consecutive second term in the U.S. Senate, and to date is the longest serving elected Democrat in Congress in Iowa history. He retired from the United States Senate in January 2015.

As a young senator, Tom was tapped by Senator Ted Kennedy to craft legislation to protect the civil rights of millions of Americans with physical and mental disabilities. He knew firsthand about the challenges facing people with disabilities from his late brother, Frank, who was deaf from an early age. What emerged from that process would later become his signature legislative achievement — The Americans with Disabilities Act (ADA).

The ADA has become known as the "Emancipation Proclamation for people with disabilities." The legislation changed the landscape of America by requiring buildings and transportation to be wheelchair accessible, and to provide workplace accommodations for people with disabilities. For his ongoing and dedicated work to people with disabilities around the world, Senator Harkin was twice nominated for the Nobel Peace Prize.

In September 2009, Senator Harkin became chairman of the Senate Health, Education, Labor and Pensions (HELP) Committee. As chairman, he played a critical role in the passage of the Affordable Care Act. In 2015, Senator Harkin and Ruth Harkin established The Harkin Institute for Public Policy & Citizen Engagement at Drake University in Des Moines, Iowa, to inform citizens, inspire creative cooperation, and catalyze change on issues of social justice, fairness, and opportunity.



Cindy Hounsell
President, Women's Institute for a Secure Retirement

Cindy Hounsell is the President and Founder of the Washington D.C. based Women's Institute for a Secure Retirement (WISER), a nonprofit launched in 1996 to improve opportunities for women to secure retirement income and to educate the public about the inequities that disadvantage women in retirement.

An attorney and retirement expert, Ms. Hounsell has been widely quoted in a variety of media and publications. Ms. Hounsell has testified before Congress and attended as a delegate at several White House summits and conferences. She has authored many chapters, columns, articles, op-eds, papers, guides, and booklets focused on women's retirement issues.

Ms. Hounsell is also Director of the National Resource Center on Women and Retirement in partnership with the U.S. Administration on Community Living's Administration on Aging. Ms. Hounsell provides technical assistance to national aging organizations and trains leaders and grassroots advocates across the country as part of the Resource Center's programs.



Richard W. Johnson, Ph.D.
Director, Program on Retirement Policy, The Urban Institute

Dr. Richard W. Johnson is a senior fellow in the Income and Benefits Policy Center at the Urban Institute where he directs the Program on Retirement Policy.

An expert on income and health security at older ages, he has authored or co-authored more than 200 journal articles, book chapters, and research reports and has testified before Congress and federal commissions. His research focuses on older Americans' retirement outlook, employment at older ages, long-term services and supports for older adults with disabilities, and state and local pensions. Recent studies have examined job loss at older ages, occupational change after age 50, and employment prospects for African Americans and Latinos over age 50. He has also written extensively about retirement preparedness, including the retirement outlook for Millennials, financial and health risks people face as they approach retirement, the affordability of long-term services and supports, and the potential impact of various Social Security reform proposals on future retirement income.

Dr. Johnson has a B.A. from Princeton University and a Ph.D. from the University of Pennsylvania, both in economics.



Congressman John B. Larson (CT)

Congressman John B. Larson proudly represents Connecticut's First District. Now in his 13th term, Mr. Larson sits on the influential House Ways and Means Committee, including the Subcommittee on Tax Policy and the Social Security Subcommittee, where he serves as the Ranking Member. Throughout his time in Congress, Mr. Larson has proven himself a staunch advocate for Connecticut's working families, Connecticut's manufacturing and small business ecosystem, and commonsense solutions for the problems Americans face every day.

Born and raised in the federal housing project of Mayberry Village in East Hartford, Mr. Larson is fond of saying he is the product of public housing, public education, and public service. His father, Raymond, worked for Pratt & Whitney, while his mother, Pauline, served on the Town Council. Mr. Larson graduated from East Hartford High School in 1967 and from Central Connecticut State University (CCSU) in 1971.

Before entering Congress, Mr. Larson taught history and coached football at George J. Penney High School. He was also an owner of Larson & Lysik insurance agency, where he saw firsthand the challenges many small business owners must overcome. Following in his mother's footsteps, he served on the East Hartford Board of Education and the East Hartford Town Council. In 1982, he was elected to the Connecticut State Senate, beginning a 12-year tenure representing the 3rd Senate District until 1995. Larson served as Senate President Pro Tempore for eight years from 1987 to 1995.



Nancy LeaMond

Executive Vice President and Chief Advocacy & Engagement Officer, AARP

As AARP's chief advocacy and engagement officer, Nancy LeaMond has responsibility for driving the organization's social mission on behalf of Americans 50-plus and their families. Ms. LeaMond leads government affairs and legislative campaigns for AARP, and she also manages public education programs, community engagement, and AARP's network of 18,000 volunteers.

Ms. LeaMond has led several landmark advocacy campaigns for AARP including the most recent Fair Drug Prices Now campaign. She has been named by The Hill as one of the "Top Lobbyists" every year since 2011. She was recognized as one of the Washingtonian's most influential people for her advocacy on public healthcare issues and named by the National Institute for Lobbying & Ethics as one of its 2022 Top Lobbyists. In 2020, she received the first ever Lifetime Achievement award from the Women in Government Relations. The National Institute for Lobbying & Ethics also named Nancy one of its 2020 Top Lobbyists. In 2016, she received the What's Next Boomer Business Innovation Award for Vision, Leadership and Integrity, and she was named one of Next Avenue's 2017 Influencers in Aging.

Ms. LeaMond is a nationally recognized leader on health, retirement security, and other issues important to older Americans. Prior to coming to AARP, she served as the chief of staff and assistant U.S. trade representative for congressional affairs at the Office of the United States Trade Representative. She worked extensively on health care and pension issues before entering the trade field, beginning her career in the Public Health Service, the Medicaid program, and the Department of Commerce. She also served in the Office of Management and Budget, the Department of Education, and on Capitol Hill as chief of staff to a senior member of Congress.

Ms. LeaMond has a B.A. from Smith College and a master's degree in public policy and city planning from the John F. Kennedy School of Government at Harvard University.



Monique Morrissey, Ph.D.

Senior Economist, Economic Policy Institute

Dr. Monique Morrissey is a Senior Economist at the Economic Policy Institute, which she joined in 2006. Her areas of interest include Social Security, pensions and other employee benefits, household savings, tax expenditures, older workers, working conditions, public employees, unions, and collective bargaining.

Dr. Morrissey is active in coalition efforts to expand Social Security and reform our private retirement system to ensure an adequate, secure, and affordable retirement for all workers. She is a member of the National Academy of Social Insurance. Prior to joining the Economic Policy Institute, Dr. Morrissey worked at the AFL-CIO Office of Investment and the Financial Markets Center.

Dr. Morrissey has a B.A. in Political Science and History from Swarthmore College and a Ph.D. in Economics from American University.



Matthew Reed, Ph.D.

Executive Director, The Harkin Institute for Public Policy & Citizen Engagement

Dr. Matthew Reed is Executive Director of The Harkin Institute. As Executive Director, Dr. Reed leads all aspects of The Harkin Institute to engage in rigorous public policy research and citizen engagement programming that advances social justice, fairness, and opportunity for all.

Dr. Reed comes to The Harkin Institute after serving most recently as Vice President for Academic Affairs at Brookdale Community College in New Jersey, one of the most acclaimed and comprehensive, multi-campus community colleges in the nation. As Vice President for Academic Affairs, Dr. Reed served as Chief Academic Officer for the college's 9,000 students and more than 180 full-time faculty members.

Prior to Brookdale, Dr. Reed served as Vice President for Academic Affairs at Holyoke Community College in Holyoke, MA, as Division Dean of Liberal Arts at the County College of Morris, and as Dean of General Education at DeVry University in New Jersey. He has also served as Senior Executive Officer for the New Jersey Council of County Colleges.

Recognized as a national thought-leader for his work on expanding access to higher education, Dr. Reed has been a featured columnist for Inside Higher Ed since 2007 and has published numerous articles as well as *Confessions of a Community College Administrator*, a book which has served as a key text for community college leadership programs.

Dr. Reed graduated with honors in political science from Williams College and earned his doctorate from Rutgers University. He has published and lectured widely on such topics as political polarization and apathy, as well as the relationship between community colleges and democracy.



Max Richtman

President and CEO, National Committee to Preserve Social Security and Medicare

A former staff director of the Senate Special Committee on Aging and 16-year veteran of Capitol Hill, Max Richtman is President and CEO of the National Committee to Preserve Social Security and Medicare (NCPSSM), one of the nation's most influential senior advocacy and education membership organizations. Mr. Richtman, who joined the organization in 1989, also serves as Chair of the National Committee's Political Action Committee (PAC) board, a non-partisan committee that endorses candidates for federal office who take uncompromising stands on social policy legislation which impacts the aging population.

Mr. Richtman has testified before House and Senate committees; provided expert political and policy commentary during appearances on CNN, C-Span, FOX, MSNBC, CBS, and Pacifica radio networks; participated in hundreds of Congressional Town Hall meetings across the country; and served as a featured speaker for numerous national and state conferences on aging.

During his congressional career, Mr. Richtman directed a lengthy investigation of Equal Employment Opportunity Commission's enforcement of age-discrimination statutes which included a series of oversight hearings and preparing the committee testimony by then-EEOC Chairman Clarence Thomas. As staff director for the Senate Committee on Aging, Mr. Richtman developed legislation to establish a Consumer Price Index [for the] Elderly (CPIE) which if adopted, would lead to a more accurate cost of living adjustment for Social Security beneficiaries.

Mr. Richtman was born in Munich, Germany, and grew up in Omaha, Nebraska. He has a degree from Harvard College and a J.D. from Georgetown University Law School. He is vice-chair of the Seniors Coordinating Council of the Democratic National Committee and a member of the District of Columbia Bar.



Kathleen Romig

Director of Social Security and Disability Policy, Center on Budget and Policy Priorities

Kathleen Romig is Director of Social Security and Disability Policy at the Center on Budget and Policy Priorities. She works on Social Security, Supplemental Security Income, paid leave, and other budget issues.

Ms. Romig previously worked at the Social Security Administration, Social Security Advisory Board, and Congressional Research Service. She began her career as a Presidential Management Fellow, during which time she completed an assignment at the Office of Management and Budget.

Ms. Romig has a B.A. from Michigan State University's James Madison College and a master's degree in social policy from University College Cork, Ireland, where she was a George J. Mitchell Scholar.



Rayna L. Stoycheva, PhD

Director of Retirement Security Policy, The Harkin Institute for Public Policy & Citizen Engagement

Dr. Rayna Stoycheva is an experienced policy researcher and faculty in public administration and policy. She joined The Harkin Institute in 2021, motivated by the opportunity to contribute to public policy making through high-quality policy analysis and citizen engagement in the policy process. Dr. Stoycheva is interested in improving the social safety net through policy design and financial management. As the Director of Retirement Security Policy, she is responsible for research on public and private retirement programs, retirement savings access and adequacy, financial literacy, and pension wealth inequality.

Prior to joining The Harkin Institute, Dr. Stoycheva was a faculty member at the University of Miami, where she taught courses in policy analysis, public finance, health economics, microeconomics, and statistics. Her publications include articles and book chapters on pensions, state and local public finance, and the financial management of international organizations.

Dr. Stoycheva has a joint Ph.D. in Public Policy, with a concentration in Public Finance, from Georgia State University and Georgia Institute of Technology, and a master's in public administration from Ohio University. She received her bachelor's degrees in political science and economics from the American University in Bulgaria.



Rebecca Vallas

Senior Fellow and Co-Founder of the Disability Economic Justice Collaborative, The Century Foundation

Rebecca Vallas is a senior fellow at The Century Foundation (TCF), where her work focuses on achieving economic justice. In 2022, she launched TCF's Disability Economic Justice team and cofounded the Disability Economic Justice Collaborative, which brings together more than 40 leading organizations across the disability rights and justice and economic policy sectors to work collaboratively to bring a disability lens across all economic policymaking in the United States. Ms. Vallas joined TCF after seven years at the Center for American Progress (CAP). During her time at CAP, she spearheaded the institution's efforts to protect the safety net during the Trump era, and originated CAP's Disability Justice Initiative—the first disability policy project at a U.S. think tank—as well as the organization's criminal justice reform work.

Much of Ms. Vallas's national and state policy and advocacy work comes from her years as a legal aid lawyer. In partnership with her legal aid alma mater, she co-developed the "clean slate" model of automated, automatic criminal record-clearing that is now law in ten states. In 2019, she co-founded the Clean Slate Initiative, a national organization supporting state efforts to adopt clean slate policies. Ms. Vallas spent several years representing low-income individuals and families at Community Legal Services in Philadelphia, where she began her work as a Skadden Fellow and was the inaugural recipient of the National Legal Aid and Defender Association's New Leaders in Advocacy Award.

Ms. Vallas authored dozens of policy reports on antipoverty policy, income security, disability policy, access to justice, and criminal records/reentry policy; testified before Congress and state legislatures on numerous occasions; and was cited and quoted in media outlets across the country. She serves as secretary of the Board of Directors of the National Academy of Social Insurance and was a member of the academy's 2020–21 Economic Security Study Panel. Ms. Vallas was twice named to Forbes magazine's "30 Under 30" for law and policy and later to Emory University's "40 Under 40." She has a bachelor's degree from Emory University and a law degree from the University of Virginia.

2023 Harkin Retirement Security Awards

Visionary Award

Congressman John B. Larson

Advocacy Award

Social Security Works

The National Committee to Preserve Social Security and Medicare

Social Security Works

Social Security Works was established in 2010 with the mission of "protecting and improving the economic security of disadvantaged and at-risk populations; safeguarding the economic security of those dependent, now or in the future, on Social Security; and maintaining Social Security as a vehicle of social justice." Social Security Works also created and staffs the Strengthen Social Security Coalition, a broad-based alliance of over 350 national and state organizations, including women's, labor, aging, disability, veterans, and civil rights groups representing more than 50 million Americans. The coalition is chaired by Social Security Works President Nancy Altman.

The National Committee to Preserve Social Security and Medicare

The National Committee to Preserve Social Security and Medicare was founded in 1982 by former Congressman James Roosevelt, the son of President Franklin D. Roosevelt, who signed Social Security into law. NCPSSM is one of the nation's largest and most effective seniors' advocacy organizations, powered by the strength of its millions of members and supporters around the country. Its mission is to protect Americans' earned benefits and to educate the public about the importance of those benefits. NCPSSM is currently presenting a series of town halls across the country, in partnership with AARP, to reinforce the value of Social Security. This new national campaign is called, "Social Security: Here Today, Here Tomorrow." Max Richtman is the President and CEO of NCPSSM.

About The Harkin Institute

The Harkin Institute for Public Policy & Citizen Engagement is a nonpartisan policy research institution focused on the four main policy areas that shaped Senator Tom Harkin's career: labor and employment, people with disabilities, retirement security, and wellness and nutrition.

The Harkin Institute aims to improve the lives of all Americans by giving policymakers access to high-quality information and engaging citizens as active participants in the formation of public policy.

The Harkin Institute conducts research in our four policy areas and hosts events like the Harkin International Disability Employment Summit and the Harkin on Wellness Symposium. THI also provides educational opportunities for students and offers a fellowship program that brings together diverse, insightful professionals to facilitate cooperative, high-quality, nonpartisan research, analysis, and education.

The Harkin Institute Staff

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Ashley Ezzio, UpLift Project Coordinator

Jennifer Fiihr, Office Manager

Lila Johnson, Graphic Designer & Digital Accessibility Specialist

Kathryn Kuckelman, Communications Manager

Matthew Reed, Executive Director

Adam Shriver, Interim Director of Wellness and Nutrition Policy

Rayna Stoycheva, Director of Retirement Security Policy

Daniel Van Sant, Director of Disability Policy

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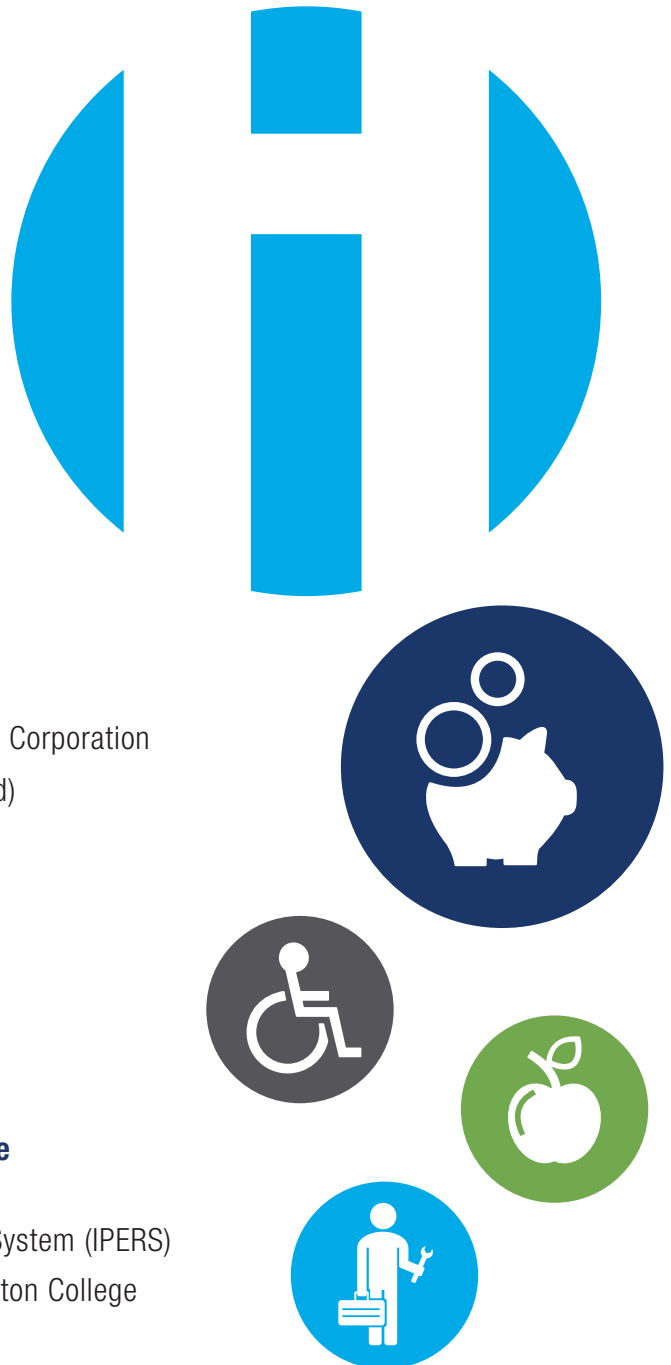
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