

July 27th-30th

2008

58th
Annual Conference

NCSSSA

In the Spirit of Collaboration



Racing for Excellence

Seelbach Hilton Hotel
LOUISVILLE, KENTUCKY



NATIONAL CONFERENCE OF STATE SOCIAL SECURITY ADMINISTRATORS

58th Annual Conference LOUISVILLE, KENTUCKY

July 27-30, 2008

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NATIONAL CONFERENCE OF STATE SOCIAL SECURITY ADMINISTRATORS

58th Annual Conference
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Dean Conder, Colorado





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Mary Smith, TN
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NCSSSA STATE SOCIAL SECURITY ADMINISTRATORS AND STAFF ATTENDING

ALABAMA

Kathleen Baxter

ALASKA

Kay Gouyton
Patrick Shier

ARIZONA

Michelle Briggs

ARKANSAS

Madison Davis
Jay Wills, III

CALIFORNIA

Marion Montez

COLORADO

Dean Conder

GEORGIA

Megan Schaum

IDAHO

Rita Foltman

ILLINOIS

Nicholas C. Merrill, Jr.

IOWA

Kurt Hiatt
Danielle Huffine

KENTUCKY

James Driver
Connie Eggen
Gerald Howard
Tammy Taylor

LOUISIANA

Angie Dowdy
Linda Yelverton

MASSACHUSETTS

Nick Favorito

MISSISSIPPI

Pauline Howard
Barbara Taylor

MISSOURI

Vandee DeVore

NEW HAMPSHIRE

Teresa Commeau-Retiree

NEW MEXICO

Christopher Bulman

OKLAHOMA

Treba Dennis
Laquitta Heard
Charmaine Wallace-Retiree

OREGON

Karen Park

PENNSYLVANIA

Arthur Doherty

RHODE ISLAND

Gayle Mambro-Martin

SOUTH DAKOTA

Lee DeJabet

TENNESSEE

Vernon Bush

TEXAS

Carolyn Fry

UTAH

Richard Beckstead

VIRGINIA

Barry Faison

WISCONSIN

Michelle Baxter
John Vincent

WYOMING

Roxane Hudson



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SOCIAL SECURITY ADMINISTRATION

**Regina Allen (Lansing, MI)
Ken Anderson (Baltimore, MD)
Regina Bachini (Boston, MA)
Timothy Beard (Seattle, WA)
Tyrone Benefield (New York, NY)
Dena Berglund (Baltimore, MD)
William Brees (San Francisco, CA)
Doris Brookens (Philadelphia, PA)
Mark Brown (Baltimore, MD)
Kelly Connelly (Philadelphia, PA)
Marc Denos (Baltimore, MD)
Dana Edwards (Baltimore, MD)
Alan Follett (San Francisco)
Rick Gann (Indianapolis)
Patricia Hayes (Illinois)
Shawn Hill (Dallas, TX)
Jeanette Jefferys (West Virginia)
Robert Jefferies (West Virginia)
Natalie Jemison (Baltimore, MD)
Kirk Jockell (Atlanta, GA)
Jim Kaib (Philadelphia)
Yvette Keesee (Denver, CO)
Timothy Kelley (Baltimore)**

**Ron Konkol (Madison, Wisconsin)
Mary Kurtz (Kansas City, MO)
John Lamotte (Columbus, Ohio)
Merry LeBlanc (Philadelphia)
Lawrence Levey (Baltimore, MD)
Anne Madden (Chicago, IL)
Ann McConnell (Denver)
David Morado (Seattle, WA)
Denise Morris (Virginia)
Jon Norberg (St. Paul, MN)
Frank O'Brien (Philadelphia, PA)
Cassia Parson (Baltimore, MD)
Vicki Porter (Dallas)
Kevin Rice (Springfield, Illinois)
Fred Sanchez (Chicago)
Ellen Sovern (New York, NY)
Deborah Stachel (San Francisco, CA)
Darryl Swain (Chicago, IL)
Chandra Thomas (Dallas, TX)
Belinda Thornton (Maryland)
Carla White (Maryland)
Annie Ziff (San Francisco, CA)**

**Paul Barnes, Regional Commissioner, Atlanta, Georgia
William Gray, Deputy Commissioner for System, Baltimore, Maryland**

INTERNAL REVENUE SERVICE

**Lynne Camillo
Sunita Lough
Jayne Maxwell**

**Chief of Employment Tax-Branch II
Director, FSLG
Manager, Compliance & Program**

July 25, 2007

**1st
Executive
Committee Meeting**

Closed Meeting

July 26, 2008

**2nd
Executive
Committee Meeting**

Closed Meeting

July 28, 2008

**1st
Business Session**

Closed Meeting

July 30, 2008

**2nd
Business Session**

Closed Meeting

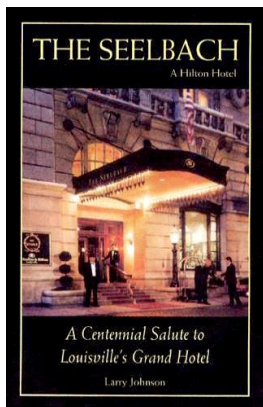
Guest Speaker

Larry Johnson

Introduced by Carolyn Fry, Texas

Larry Johnson is a former National Bellman of the Year for the Seelbach Hilton and today its lobby concierge. He has been with the hotel for nearly 25 years and has met and helped a wide variety of hotel guests, celebrities, movie and television stars and sports personalities. During this time he has become the official historian for the hotel and the chronicler of all Seelbach legend, myth, and history, especially involving stories of the ghostly kind.

Larry John is the author of, *The Seelbach: A Centennial Salute to Louisville's Grand Hotel*



Book Description

For 100 years the Seelbach Hotel has been a bastion of stately, elegant architecture in the grand old style, offering world-class dining and Five-Diamond service. Along the way, the hotel has hosted its share of celebrities, presidents, movie stars, famous writers, gangsters and even ghosts, all of whom are discussed in lively fashion in this centennial compilation by Larry Johnson, the hotel's concierge and consummate chronicler of the Seelbach's curious legends, myths and history.

Jonathan Miller

Kentucky Secretary of Finance

Jonathan Miller, 41, was appointed by Governor Steve Beshear in December 2007 to serve as Kentucky's Secretary of the Finance and Administration Cabinet.

As the state's Chief Financial Officer, Secretary Miller oversees the agency that operates as the hub of state government, and serves on dozens of state boards, covering policy matters which range from higher education to environmental protection, from affordable housing to the 2010 World Equestrian Games.

Secretary Miller has led Governor Beshear's recent pension reform efforts which have already resulted in passage of comprehensive, bi-partisan legislation that averted the systems' bankruptcy. Currently, Miller chairs the Kentucky Public Pension Working Group, which is developing plans to help improve fund investments, provide sufficient long-term state funding for the pension plans, and ensure quality, affordable, and sustainable health care benefits for teachers and state employees.

When the nation's financial crisis this year threatened to shut down the state's student loan corporation, Miller helped engineer a \$50 million bond purchase that served as a bridge loan to keep the student loan program afloat. This move ensured that over 110,000 Kentucky students would be able to pay for higher education this fall, at a favorable rate to Kentucky taxpayers.

Secretary Miller also is leading the Beshear Administration's efforts to promote energy efficiency and conservation in state government; to provide for the long-term financial self-sufficiency of Recovery Kentucky, a nationally acclaimed statewide network of peer-to-peer drug treatment facilities; and to ensure government transparency and accountability through establishment of a new Web site where citizens will be able to review how their tax dollars are being spent.

Prior to his appointment to the Beshear Cabinet, Miller served for eight years as Kentucky's State Treasurer, having been elected statewide in 1999 and re-elected in 2003.

As Treasurer, Miller helped create a pre-paid college tuition savings program to help Kentucky parents better afford a college education for their children. Kentucky's Affordable Prepaid Tuition program (KAPT) has enrolled more than 9,000 families since its launch in 2001. Miller also formed a bipartisan Commission on Personal Savings and Investment, which developed a variety of programs and initiatives to promote financial literacy by educating students about responsible credit use; prohibiting aggressive marketing of credit cards on campus; protecting our most vulnerable citizens from predatory lending practices; offering free financial training for Kentucky women and girls; and easing the financial burdens on military families during times of deployment.

While Kentucky State Treasurer, Miller streamlined internal accounting procedures, modernized office technology and improved customer service. The unclaimed property program launched a series of popular eBay auctions and broke records in terms of claims processed and money returned to its rightful owners.

In May 2001, Miller was appointed to the Executive Monitoring Committee of state and local financial officers, which monitors the return of assets seized during the Holocaust to their rightful owners. In March 2002, Miller was one of 200 distinguished delegates appointed by President Bush and Congressional leaders to the 2002 National Summit on Retirement Savings charged with developing strategies to ensure a secure and dignified retirement for all Americans.

Miller has been active in the political arena, serving on the Democratic National Committee Rules Committee in 2008, as Chairman of the Kentucky Democratic Party in 2007, and having a featured speaking role at the Democratic National Convention in 2000. Miller also has played several leadership roles in his community, including service on the board of the Lexington Urban League.

Prior to his service in state government, Miller was an aide to former Vice President Al Gore, Deputy Chief of Staff for the U.S. Department of Energy, Legislative Director for Tennessee Congressman Jim Cooper, and an attorney in private practice for Latham & Watkins in Washington, DC, and Miller, Griffin & Marks, in Lexington.

Miller is the author of a critically-acclaimed book on the role of faith in public policy, *The Compassionate Community: Ten Values to Unite America*, published nationally in 2006 by Palgrave MacMillan, a division of St. Martin's Press.

Miller is a native of Lexington, and graduated with high honors from both Harvard College and Harvard Law School. He currently resides in Lexington with his wife Lisa, and their daughters, Emily (14) and Abigail (12).

Moderator: James Driver, Kentucky



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“Leveraging Technology”

Speaker:
Bill Gray
Deputy Commissioner for Systems, SSA

Bill Gray informed the Conference of the challenges of meeting the technology demands for SSA. There were over \$500 Trillion in postings, 82 million calls to the 1-800 number, and 25% of the federal budget outlays are rolled up in meeting these demands.

By 2025, there will be twice as many people on SSA rolls as there were at the end of 2007. Currently, the SSA is placing heavy emphasis on meeting the challenges now in dealing with disability. The only way to keep up is by technology.

Over the last 6 years the SSA has moved from paper to electronic. The National Disability System is web based. And a standard coding with the medical industry has been created.

Sixteen thousand file for benefits daily. There is simply not enough staff to handle this demand. Currently, only 20% is filing online. The goal is to drive that number up to 50% by 2012.

Technology will continue to strive to meet the increasing demands on SSA.

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Moderator: James Driver, Kentucky



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“Role of State Social Security Administrator”

Speaker:
Linda Yelverton

Linda Yelverton is employed by the Louisiana State Treasurer and is responsible for Section 218 Social Security & Medicare coverage. SSA Regulations require that each state designate a person to act for the state in administering that state’s Section 218 Agreement. Linda Yelverton is the State Social Security Program Director for Louisiana and has handled Section 218 coverage for almost 37 years. She is currently training her replacement – Angie Dowdy, Social Security Program Analyst

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Moderator: Kathleen Baxter, Alabama



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“Chronology of NCSSSA and State Administrator”

Speaker:
Michele Briggs

Michele Briggs has been employed with the Arizona State Retirement System for the past 9 years. For the last 6 years, she has served as the Employer Relations Manager for External Affairs and is the main contact for over 725 employers. In addition to her duties, she serves as the State Social Security Administrator for the state of Arizona.

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Moderator: Kathleen Baxter, Alabama



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“Social Security Administration Communications Update”

Speaker:
Dana Edwards
Public Affairs Specialist, SSA

Dana V. Edwards Bio

Dana V. Edwards is a Public Affairs Specialist in the Office of Intergovernmental Affairs in the Office of External Affairs in Social Security’s Office of Communications. The Office of Intergovernmental Affairs serves as the liaison with the national organizations of State and local governments and agencies, and other Federal agencies.

He began his career with SSA as a claims representative in the Santa Barbara Field Office in the San Francisco Region. He has held a wide variety of program and management positions in a number of Social Security’s Regions and Central Office.

The Agency job he considers to have been the most rewarding was when he was the Field Representative in the San Rafael, California Field Office. In that job, he got to travel throughout beautiful Marin County, which is just North of San Francisco, taking claims and interacting with businesses, the media, schools, hospitals and local governments, making weekly visits to San Quentin State Prison, and giving speeches about Social Security.

There are three new products at SSA.

1. SSA Online Retirement Estimator launched mid-July. This tool can be used to help workers and financial advisors better plan for future retirement needs.
 - Allows immediate and personalized information to help plan for your retirement
 - Convenient. It is tied to your actual earnings record which eliminates the need for a person to manually enter their data from their SSA statement.
 - Interactive. It allows you to compare different retirement options by changing your stop work date or expected future earnings.
 - Secure. No personal information is revealed.
 - Cannot be used if WEP is involved or if the individual is a medicare beneficiary.
 - More information is available at www.socialsecurity.gov

2. Upcoming changes to the Social Security Statement (last revised in 2006).
 - Now includes a statement from the Social Security Commissioner recommending mymoney.gov website as an excellent planning tool.
 - Targeted inserts are being developed to go in the statements. These will focus specific messages based on recipient's age.
 - A new fact sheet "When to start receiving retirement" is being developed which will target ages 25-35 to help them better understand their Social Security rights and responsibilities.
3. Social Security Office Directory
 - [Available online only at the SSA CORE website](#)
 - [pdf format can be downloaded, printed and distributed as needed.](#)

Moderator: Lee DeJabet, South Dakota



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Taxpayer Advocacy Panel (TAP)

Speaker:
Dean Conder

The purpose of the Taxpayer Advocacy Panel (TAP) is to identify and elevate issues for the IRS. They hold public meetings to get citizen input, and then make recommendations to the IRS for improvements. Dean briefly reviewed the history of the TAP, and the panel members. Each panel member serves on two committees, an Area Committee and an Issues Committee.

There have been many success stories already with the TAP. Small business reporting has been made easier. Source information for disaster victims has been consolidated. Many tax forms have been revised for ease in understanding and simplification.

The group is always recruiting volunteers. You don't have to be a tax professional to serve. Applications and other information about TAP can be found at their website at www.improveirs.org.

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[Part 1](#)

[Part 2](#)

Moderator: Vandee DeVore, Missouri



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“Advisory Committee on Tax Exempt and Government Entities (ACT)”

Speakers:

Sunita Lough

Director, Federal, State and Local Governments (FLSG), IRS
and

Nick Merrill, Illinois

Accounting Division Manager

ACT is a committee of outsiders that was formed to basically make life easier for taxpayers.

There are 27 members on ACT and include external stakeholders and representatives who deal with employee retirement plans, tax-exempt organizations, tax-exempt bonds and federal, state, local and Indian tribal governments. ACT members are appointed by the Secretary of the Treasury and generally serve two-year terms. They advise the IRS on operational policies and procedures. ACT cannot change laws as congress makes the rules and they can't take on any project they want. The projects they work on usually last the entire year and a report is made at their annual meeting in Washington D.C.

Some of this year's projects include: in a project bridging the Employee Plans and Federal, State and Local Governments areas, proposals for improving public sector defined contribution plans; and in the Federal, State and Local Governments area, a report on tax treatment of cellular telephones and Internet-provider allowances.

In addition to these projects, the ACT has urged TE/GE to utilize this committee and its subgroups for ongoing consultation in the hope of improving both the administration of the tax law and the relationship of the IRS to their constituencies. The ACT believes that significant progress has been made in filling this additional role.

The benefits that this organization provide affects everyone not just governmental employers. Nick's term will end this year and they are looking for new members to join the team. They have four meetings per year and an annual meeting.

Moderator: Danielle Huffine, Iowa



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“SSA – Legislative Update”

Speakers:

Tim Kelly

Staff Director-SSA

Dena Berglund

Social Insurance Specialist, OASDI, Office of Legislation and Congressional Affairs-SSA

Tim Kelley and Dena Berglund of the SSA provided legislative update to the Conference. They provided brief backgrounds and explanations of the Windfall Elimination Provision (“WEP”), the Government Pension Offset (“GPO”) and efforts at mandatory social security coverage.

Tim serves as the Staff Director for the Office of Legislation & Congressional Affairs for the SSA. Dena works as a Social Insurance Specialist for the Office of Legislation & Congressional Affairs. Both Tim and Dena are headquartered in Baltimore.

Tim and Dena indicated that more than 1.1 million individuals were affected by the WEP as of June, 2008. Some 485,000 beneficiaries are affected by the GPO as of June 2008. They highlighted various legislation that had been filed to modify or repeal the WEP and GPO and the arguments for and against. They also discussed the likelihood of these issues being addressed by either of the incoming administrations

With regard to mandatory social security efforts Tim and Dena reported that some 28% of the more than 6.4 million state and local employees are not covered under Social Security. They highlighted the positions advanced by the supporters (increased portability; universal coverage) and opponents (cost to local entities; adverse impact on public pension funding) of the issue.

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[Part 1](#)

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[Part 4](#)

Moderator: Nick Favorito, Massachusetts



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“Government 101”

Speaker:
Dean Conder, CO

Recap of Session

Mr. Dean Conder’s presentation provided important information as to how the government works and the impacts on state and local government FICA and Medicare coverage and taxation.

Mr. Conder discussed the following topics:

- Hierarchy of Law
- Supremacy Clause. Article VI "...This constitution, and the Laws of the United States which shall be made in Pursuance thereof; and all Treaties made, or which shall be made, under the Authority of the United States, shall be the supreme Law of the Land;..."
- Separation of Powers
 - Prohibits either federal or state from infringing on or encroaching upon or exercising the powers belonging to another branch.
 - Congress is vested with the power to create laws and the President and the federal agencies are charged with executing those laws. The Courts decide the meaning of law and how they are applied, and whether they violate the constitution.
- Federalism and Section 218
- How power is distributed in the United States

National Government	State Government
<ul style="list-style-type: none">• Coin money.• Declare war.• Conduct foreign relations.• Oversee foreign and interstate trade.	<ul style="list-style-type: none">• Ratify amendments.• Manage public health and safety.• Oversee trade within the State.

Shared powers

- Make and enforce laws.
- Tax.
- Borrow money.
- How are Laws made?
- Hierarchy of Court Rulings
 - Hierarchy depends on the issue to be decided.
- Which Agency has Supremacy?
 - None.
- Federal or State Law?

Federal law applies to the following:	State law applies to the following:
<ul style="list-style-type: none">➤ Does an employer-employee relationship exist?➤ What is the identity of the employer?➤ Are earnings wages?➤ What are emergency services?➤ What are student services?	<ul style="list-style-type: none">➤ Who is an officer of a state or political subdivision?➤ Is an entity a political subdivision?➤ What is the legal status of a new entity?➤ Is a function governmental or proprietary?➤ Is a position under a retirement system?➤ Which employees are eligible for membership in a retirement system?➤ Who is an employee for purposes of retirement system participation?

- State Government
- Dillon's Rule
- State Control of Political Subdivisions
- Other Resources
 - SSA State and Local Training Website: <https://collab.core.gov>
 - Ben's Guide to U.S. Government: <https://bensguide.gpo.gov>

The information provided in this session was of great value and worthwhile.

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Moderator: Michelle Baxter, Wisconsin



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“Federal, State and Local Governments – IRS Toolkit”

Speaker:

Jane Maxwell

Manager, Compliance and Program Management-IRS

Jayne Maxwell, Manager, Compliance and Program Management with Federal, State and Local Governments presented updates on the FSLG Toolkit. The toolkit is located at www.irs.gov/govtandprovidesasinglepointentrytobasicinfonnation., links and forms for government employers.

The FSLG Toolkit was created based on a recommendation from the ACT committee and the information is automatically updated. The Toolkit also contains a link for government employers to sign up for the semi annual newsletter.

It was suggested by NCSSSA the newsletter include information about the IRS Toolkit and increasing the newsletter more than the current semi annually publication. Both suggestions are being considered. NCSSSA is encouraged to suggest topics for articles in the newsletter.

[Click Here to View Presentation](#)

Moderator: Laquitta Heard, Oklahoma



NATIONAL CONFERENCE OF STATE SOCIAL SECURITY ADMINISTRATORS

58th Annual Conference
LOUISVILLE, KENTUCKY
July 28, 2008

“New Entity Referendums”

Speaker: James Driver

This presentation detailed the most important “Things to Do” if you have a new Political Subdivision.

- 1.) Get legal documentation first**
 - a.) Make sure to review all statutes**
 - b.) Is it a “Body Politic”? Does it have the right to sue or be sued?**
 - c.) Do they have their own by-laws and do they stand alone?**
 - d.) Contact State Attorney General to see if they stand alone**
- 2.) Notify Subdivision of Political Options**
 - a.) Be impartial when giving options**
 - b.) Educate employers**
- 3.) Submit Resolution/Amendment**
 - a.) Explain Consequences if they elect to cover for Social Security**
 - b.) Explain Consequences if they do not elect to cover for Social Security**
- 4.) Set the time and place within 90 days to send letters to Employees**
- 5.) Employees have to be an Employee on the date of letter in order to vote**
- 6.) Hold the Referendum Vote**
 - a.) Know your state and potential problems/audience**
- 7.) Issue the Plan and Agreement to ratify plan**
- 8.) After the agreement is signed send copy's to SSA**
- 9.) Notify Subdivision agreement has been signed and received**
 - a.) Always make sure the effective date is on the 1st day of the quarter.**

[Click Here to View Presentation](#)

Moderator: Kurt Hiatt



NATIONAL CONFERENCE OF STATE SOCIAL SECURITY ADMINISTRATORS

58th Annual Conference
LOUISVILLE, KENTUCKY
July 28, 2008

“New Government Plans Initiative”

Speaker: Sunita Lough, Director FSLG, IRS

Background:

- There are approximately 2,160 plans covering approximately 20 million workers
- One out of every five employees in the US is a government employee and governmental plans hold approximately \$3 trillion in pension assets.
- Focus on governmental plans relates to recent publicity around the economic stress issues surrounding public plans
- Employee Plans (EP) has not historically had a meaningful presence in the governmental plans area
- There is no governmental plan prototype

The Government Plan Initiative is intended to:

- Raise awareness of the tax-qualification requirements and need for compliance with Federal pension laws
- Provide EP with a better understanding of the unique aspects of these governmental plans that confront governmental plan sponsors
- First phase of effort directed to increased audits of governmental plans to ensure compliance with section 401(a) of the IRC and appropriate tax treatment of plan participants

Process:

- Employee Plans Compliance Unit (EPCU) would manage the survey governmental plans
- Surveys would provide basic information about the plan and participants
- Survey:
 - o Initially directed to 25 plans with later extension to approximately 200
 - o Surveys would also contain questions as well as requests for information that are not within those areas that are enforceable

[Click Here to View Presentation](#)

Moderator: Barry C. Faison (VA)



NATIONAL CONFERENCE OF STATE SOCIAL SECURITY ADMINISTRATORS

58th Annual Conference
LOUISVILLE, KENTUCKY
July _29_, 2008

“Keynote Speaker”

Speaker: Paul D. Barnes, Regional Commissioner, Region IV, SSA

Paul Barnes opened with a humorous story about not being appreciated for hard work. He encouraged us to continue to keep up our hard work and to know we were appreciated for it. He said he is hoping that an increased budget will help increase lost positions. Even if a budget bill is passed, the money will not actually come in until March 1, 2009.

Moderator: James Driver, Kentucky



NATIONAL CONFERENCE OF STATE SOCIAL SECURITY ADMINISTRATORS

58th Annual Conference
LOUISVILLE, KENTUCKY
July 29, 2008

“Issues Affecting Section 218 Agreements”

Speaker:

Jane Maxwell, Manager, Compliance and Program Management (IRS)
Lynne Camillo, Chief, Employment Tax Branch 2 / Associate Chief Counsel

This session presented information on the continued maintenance of the employer 218 Agreements and the possibility of the eventual electronic accumulation of information contained in the agreements.

Ms. Maxwell discussed the way information will be hopefully accumulated and processed so that it can be quickly referenced by the SSA and IRS in the future. She also reviewed the problems with the current information and emphasized that assistance will be needed from the states to accumulate the data required to make this program work.

She stressed a commitment from her staff to accelerate the accumulation program, and discussed the way these goals would be accomplished.

Moderator: Kay Gouyton, AK



NATIONAL CONFERENCE OF STATE SOCIAL SECURITY ADMINISTRATORS

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Section 218 “Error Modifications”

Speaker: Fred C. Sanchez

Mr. Sanchez began his Federal career in April 2001, with the Office of the General Counsel, Social Security Administration, Chicago – Region V. Mr. Sanchez provides legal counsel and advice on a broad range of programmatic topics for the Social Security Administration and serves as the resource for state and local matters for the Chicago Region.

Mr. Sanchez discussed when an error can occur and in detail, several ways an error modification could be corrected. It was mentioned that not all errors need a modification; some can be corrected through a written request, but other issues must be corrected either through a standard modification, error modification or a 218(e)(3) modification. An overview regarding common reporting errors was provided and it was explained how each error could be corrected.

Mr. Sanchez was the main speaker, which also included a panel that was assembled to further discuss the topic. The panel consisted of: James Driver, KY, Karen Park, OR, Tim Beard, SSA Region X and Mark Brown, SSA. Several website addresses were provided to the audience as a resource should this issue come up in their respective state.

[Click Here to View Presentation](#)

Moderator: Michele Briggs, AZ



NATIONAL CONFERENCE OF STATE SOCIAL SECURITY ADMINISTRATORS

58th Annual Conference
LOUISVILLE, KENTUCKY
July 29, 2008

“FSLG: FY 2008 and Looking into FY 2009”

Speaker:

Sunita Lough, Manager, Compliance and Program Management (IRS)

Ms. Lough discussed the unusual nature of the three agencies that work to maintain the 218 Agreement program. The fact that two of the agencies are bound by the complexities of Federal disclosure limitations; while the third agencies disclosure laws vary by state further complicates the exchange of information. She stressed the importance of all three agencies working together within the confines of each of these variable sets of laws.

She emphasized the continuing approach her officers are working under that is a combination of compliance auditing and employer education. She stressed the importance of the relationship between her officers and the State Administrator positions and encouraged all the State Administrators to seek out and develop a relationship with their FSLA assigned contact.

She did acknowledge a shortage of FSLA staff and stressed that they were trying to automate some of the information they could communicate to assist both the SSA and State Administrators when ever possible.

Moderator: Kay Gouyton, AK



NATIONAL CONFERENCE OF STATE SOCIAL SECURITY ADMINISTRATORS

**58th Annual Conference
LOUISVILLE, KENTUCKY**

July 29, 2008

“IRS-Recent Developments in Employment Tax Litigation, Legislation and IRS Guidance”

Speaker:

Lynne Camillo

Chief, Employment Tax Branch 2/Assoc. Chief Council - IRS

RECAP:

What's new with IRS and Tax law and IRS Guidance

Effective 1/1/2009

1) New procedures for making Employment Tax Adjustments

Generally taxpayers who underpay the IRS owe interest and taxpayers who overpay the IRS are due interest. There is a unique exception to Employment taxes only. Employers are allowed to make interest free adjustment with the next tax form they file. This is done with the form 941C with their regular form. The 941C form will be going away. To reduce the burden on tax payers, we are developing new form, similar to the form amended 1040. There are a whole set of new forms available, including form 941X, (at IRS.gov) for use that will correspond line by line with the Employment tax return that's being corrected. These forms will be filed to adjust the return period for which the wages or compensation were paid and can be used if the tax payers discover the results themselves. These forms can be used to adjust over or under payments.

2) Disregarded entities such as Limited Liability Companies

These are creatures of state law. IRS has determined how to tax limited liability companies. Depends on how many member they have and what elections they make, two or more members can elect to be taxed as a partnership or as a corporation. These new rules apply to single member limited liability companies; can be taxed as corporation or sole proprietorship. IRS challenge was to determine who is liable for employment taxes; LLC or owner. The entity doesn't exist for tax purposes. New rules: single member limited liability entities will now be liable for employment taxes on wages paid after 1/1/2009.

3) Tax treatment of Military Differential pay

Pay that civilian employers continue to pay to employees called to active military service. This is normally for the difference between what the employee would have received from the civilian employer and what their military base pay is. IRS determines these payments are not considered wages since employees are considered termed when called to duty. The Heroes Earnings Assistance Relief Tax Act of 2008 disputes the IRS ruling in part. Heart will make the differential payments subject to income tax withholding. The IRS ruling, unless congress makes changes, will still be in effect regarding FICA and FUTA.

4) Proposed regulations that extends the definition of Qualifying Non-Personal Use Vehicles

Whether a vehicle provided by an employer to employee is determined Qualified Non-Personal Use will determined how it is taxed. This determination is made based on the amount of time the vehicles would/could be used for personal purposes. Only the business use of a vehicle is excluded from tax, not the commute to and from home. Vehicle logs must be used to verify how the vehicle was used. Employers are to determine how much use is personal and assign a dollar figure for taxing purposes. In the past, only “clearly marked police and fire vehicles” were excluded from taxes. Some Emergency Medical Service Organizations went to their congressman and said they respond to emergencies, just as police and firefighters do, sometimes we are the first on the scene of accidents and because we don’t have clearly marked police or firefighter vehicles we are unable to get the exclusion for qualified non-personal use vehicles.

IRS acknowledged the merit of their argument and has issued proposed legislation to expand the definition of qualified non-personal use vehicles to include clearly marked public safety vehicles. IRS has requested comments and all are due by September 8, 2008. If you would like to comment please do so. Call me at (202) 622-6040.

5) New Section 3402(t) of Internal Revenue Code enacted in 2005

All government entities, with the exception of some small entities making payments of less than \$100,000,000.00 will be required to deduct and withhold the tax of 3% on all purchases to all persons on all service or property payments.

6) Medical Residents

Continuing saga: Continuing to Litigate whether medical residents are students and therefore exempt from withholding on wages. Medical residents are new doctor who have received their degrees and are performing services as hospital staff as post graduates. Under new regulations, medical residents are not students and are not exempt from tax withholdings. Outcome is pending the circuit courts decisions.

7) Stressed that pure tax questions should be referred to FSLG field specialists. One question raised was whether wages can be deferred into another time period, very frequently regarding teachers. Teacher can be paid for 10 months of work over twelve months. Any pay arrangement that allows employees to elect to receive compensation that is earned in one year, in a subsequent year, is considered a deferral of compensation, unless a part of a qualified retirement plan. In 2004 congress passed legislation to crack down on abuses involving non-qualified deferred compensation. An example of ENRON was given, when highly paid executives, who knew the company was failing, who had lots of generous no-qualified compensation, were able to get their money out of the company before it went down while leaving the rank and file employees holding the bag. Because wages are deferred for teacher they fall into this category per 409(A). IRS has issued guidance to make sure there is no undue burden put on teachers.

Moderator: Marion Montez, CA



NATIONAL CONFERENCE OF STATE SOCIAL SECURITY ADMINISTRATORS

58th Annual Conference
LOUISVILLE, KENTUCKY
July 29, 2008

SSA- Online Training, CORE

Speaker: Marc Denos, Policy Specialist, Office of Earnings, SSA

Marc Denos, SSA, is a Social Insurance Specialist for the SSA Office of Retirement and Disability Policy (ORDP), Office of Earnings (OE), in Baltimore, MD. He is primarily responsible for administering the state and local government coverage program. He plans, develops, evaluates, and issues operational policies and procedures concerning coverage issues related to Section 218 of the Act. Marc is also the Chief Administrator for the State and Local Community Center.

Marc presented an overview of “The Online” State and Local Coverage Community (S&L Community), and along with a powerpoint presentation, showed conference attendees how to use, and navigate through, the S&L Community. The S&L Community is comprised of members who work in this field, and are focused on S&L coverage. The S&L Community provides training courses for both new and experienced employees, and offers a support network through knowledge sharing and communication.

Marc’s presentation included logging into the S&L Community at <https://collab.core.gov> and showing how to request a user account. Once logged in, he showed how easy it was to navigate to the SSA State and Local Community. The website is comprised of different areas, which together, create the community, but also function separately to provide various services to members.

Marc demonstrated the Welcome Page, how the various tabs worked, the Communication Center, Resources, the State and Local Library, and how to access State specific information. The presentation also included the training sessions currently on the site. The session was very informative and “The Online” S&L Coverage Community should be a useful tool for state and federal employees who are involved in the application of Section 218 of the Act.

Click Below to View Presentation

[Part 1](#) [Part 2](#)

Moderator: Nick Merrill, Jr., IL



NATIONAL CONFERENCE OF STATE SOCIAL SECURITY ADMINISTRATORS

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“Retiree Spotlight”

Speaker:

Charmaine Wallace, Retired NCSSSA, Oklahoma

Charmaine Wallace worked for the Oklahoma Department of Human Services for 34 years.

She began her career under one of its Agencies with the Pauls Valley State School as it was called then, for the mentally retarded and physically disabled. For 25 years she supervised the Business Office and then became Assistant Business Manager keeping within the Oklahoma Statutes, Nursing Home guidelines and the State Medicaid Plan.

She stated it was like running a large household making sure the facility had food, clothing, medicine, recreational activities, vehicles, with the aid of hard working staff and interacting with clients and parents. In other words it was not an 8 to 5 job.

Charmaine transferred to the Department of Human Services in Oklahoma City in 1994. She was assigned to work in the OASI Unit (State Social Security Bureau) under Office of Finance while still working with budgets and contracts. She became responsible for the Section 218 Social Security & Medicare coverage of Oklahoma.

SSA Regulations require that each state designate a person to act for the state in administering that state’s Section 218 Agreement.

She became very active in the NCSSSA and was Regional Vice-President in 1997. Her boss, Russell Graves served as the 1997 NCSSSA President. Charmaine handled the Section 218 coverage for Oklahoma until her retirement in 2002.

Charmaine lives in the country and help raises Guinea’s & chickens with her neighbor, has 5 expensive adopted stray cats, active in various clubs and her church, practices and teaches piano and swims 4 times a week.

Moderator: Linda Yelverton, LA



NATIONAL CONFERENCE OF STATE SOCIAL SECURITY ADMINISTRATORS

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“You Don’t Have to be a Minor to be Ineligible”

Speaker:

Mark Brown, Policy Specialist, Office of Earnings (SSA)

Mark, with the assistance of some NCSSSA attendees, introduced the topic with an entertaining skit about a little boy and his father in line to ride a roller coaster. After much waiting, the boy learns that he’s “in-elig-bull” because he’s not old enough.

(Note: Because of the amount of interesting information, this report will provide much of the body of Mark’s presentation.)

The point of the skit was to serve as an illustration on how much, in our society, age dictates one being eligible or not, e.g., certain age to drive a car, etc. More importantly, how controls are in place throughout our daily lives, e.g., must be a citizen to vote, age requirements, etc.

Relating this to state and local coverage, the term “ineligible” refers to an employee who performs services in a position under a retirement system but who is ineligible for membership *in that* retirement system because of a personal disqualification, e.g., age, part-time employment, date of hiring. What sets the “ineligible” apart is that another employee in the same position who has no such disqualification would be eligible for membership in the retirement system.

Most states have included either in their original 218 Agreement or else by a subsequent modification to their Agreement, language that permits Social Security coverage of retirement system ineligible. Often this language was included with the language which initially permitted Social Security coverage of retirement system groups.

In order to be considered “ineligible” for Social Security coverage purposes, the individual must meet the definition of “ineligible” at a **critical time point**.

1. In general, the critical time point is determined based on the employee being ineligible on one of the following dates:
 - a. September 1, 1954 or if the coverage agreement was later,
 - b. The date the Agreement is made applicable to the employee’s coverage group, or
 - c. The date the employee first occupied the position under the retirement system.

If the employee had an “option” to join the retirement system on September 1, 1954, or, if later, the employee had an “option” on the date he/she first occupied the position, the employee would not be considered an ineligible, even though the option expired before a referendum is held.

2. Where the retirement system obtained Social Security coverage via a divided referendum, the critical point in time is determined based on the employee being ineligible for retirement system membership as of
 - a. August 1, 1956 or, if later
 - b. The date the employee first occupied his/her position

PROVIDING (Voluntary Social Security) COVERAGE FOR INELIGIBLES

Ineligibles do not in themselves constitute a separate coverage group. This means they cannot be covered for Social Security by themselves; they have to be included with or subsequently added to their entity’s absolute coverage group or the retirement system coverage group.

Ineligibles may be covered with other employees in one of three ways:

1. As part of, or as an addition to, an absolute coverage group.
2. As part of a retirement system group that obtained Social Security coverage through a majority vote referendum.
3. As part of, or as an addition to, a divided vote retirement system group that voted “for” Social Security coverage (the “yes” group).

COVERING THE INELIGIBLES WITH THE ABSOLUTE COVERAGE GROUP

Retirement system ineligibles, other than ineligibles in police officer and firefighter positions, may be covered as part of our in addition to their absolute coverage group.

These employees will usually be ineligibles of a retirement system that does not have SS coverage. If the ineligibles are covered as part of the absolute coverage group (under the same modification), they share the same effective date and the same optional exclusions that apply to the absolute coverage employees.

If their entity’s absolute coverage group is already covered for SS, the ineligibles will be covered by a subsequent mod as an addition to that absolute coverage group. The optional exclusions already in place for the absolute coverage group will apply also to the ineligibles. The State may select for the ineligibles the same effective date as the absolute coverage group or it may choose a different effective date. The effective for the ineligibles cannot be earlier than the effective date of coverage for the absolute coverage group.

When preparing the mod, language must be included which states what will happen to an ineligible’s SS coverage once h/she becomes a member of the retirement system. (See exhibit 3 in SL 40001.490 for an example of such language)

COVERING THE INELIGIBLES WITH THE MAJORITY VOTE RETIREMENT SYSTEM GROUP

Retirement system ineligible who are not already covered for SS as part of the absolute coverage group are automatically covered if the retirement system obtains SS coverage following a favorable majority vote referendum, unless their positions are optionally excluded under the 218 Agreement (SL 30001.340D, SL 30001.324A, SL 30001.357).

COVERING THE INELIGIBLES WITH THE “YES” GROUP OF A DIVIDED VOTE RETIREMENT SYSTEM

Although retirement system ineligible are deemed to be a part of the “no” group of a divided vote retirement system, the State, if it so chooses, may provide SS coverage for the ineligible at the time SS coverage is first provided for the divided vote retirement system’s “yes” group following the referendum (See SL 3000.340E). Or, if the “yes” group is already covered for SS under a Section 218 Agreement, the State may provide the retirement system’s ineligible with SS coverage as additional services to the retirement systems coverage group via a subsequent mod. Either way, the ineligible do not have a right of individual choice. (These provisions do not apply to retirement system ineligible in police officer and firefighter positions)

Covering the ineligible as part of the “Yes” group

If the State is initially covering the “yes” group of the retirement system and includes the retirement system’s ineligible in the Agreement, the ineligible have the same optional exclusions and effective date of coverage as the “yes” group.

Covering the ineligible when the “yes” group has already been covered

Where the retirement system’s “yes” group has already been covered for SS under a Section 218 Agreement and the State now wishes to extend SS coverage to the retirement system’s ineligible as an addition to the “yes” group, it can do so via a subsequent mod. The ineligible will have the same optional exclusions as the “yes” group, but the effective date of coverage can be different, but no earlier than the established for the “yes” group.

REHIRED ANNUITANTS AS INELIGIBLES

The SSA does consider rehired annuitants as members of their retirement system as long as their current employer had positions under that retirement system. That, however, is for mandatory SS purposes, but that is not necessarily the case when it comes to voluntary SS coverage (Section 218 Agreement).

It is very important to know what the retirement system’s rules are concerning an individual’s membership in the retirement system once that person retires or reaches retirement age.

**Respectfully submitted,
John Vincent
Wisconsin Social Security Administrator (2007-2008)**

Click Below to View Presentations

[The Saga of the City of Fresno](#)
[You Don’t Have to be a Minor to be Ineligible](#)



NATIONAL CONFERENCE OF STATE SOCIAL SECURITY ADMINISTRATORS

**58th Annual Conference
LOUISVILLE, KENTUCKY**

July 29, 2008

3:15 p.m. – 3:30 p.m.

“Information Reporting Program Advisory Committee”

Speaker: James Driver

James Driver presented information related to his participation on the Information Reporting Program Advisory Committee (IRPAC). This Committee operates with several people across the country to advise the Internal Revenue Service on issues related to information reporting. Having a representative from NCSSSA gives NCSSSA a voice in IRS reporting. James will be sending out a request to all members asking them to identify reporting issues that can be taken to IRPAC for consideration, and urges members to consider serving on this committee in the future.

Moderator: Megan Schaum

COMMITTEE

A grayscale background image featuring a Louisville Slugger baseball bat in the foreground, angled diagonally. The bat has the words "GENUINE" and "LOUISVILLE SLUGGER®" printed on it, along with a handwritten signature "J.A. 'Bud' Hulsanich". In the background, a large, multi-story building with many windows is visible, creating a sense of depth and scale.

REPORTS



NATIONAL CONFERENCE OF STATE SOCIAL SECURITY ADMINISTRATORS

58th Annual Conference
LOUISVILLE, KENTUCKY
July 27-30, 2008

AUDIT COMMITTEE

2007/2008 Conference Year Report

The Audit Committee met on Sunday, July 27, 2008, to review the Conferences' financial records and/or receipts. Harry Wales, Treasurer (WY) was unable to attend the meeting or the 2008 conference, therefore he transmitted the reports and information ahead of time to John Vincent. The Report was put together by Harry Wales for the period of July 2007-July 18, 2008.

The Committee reviewed the financial report in detail. No discrepancies were noticed. Expenses for the Kentucky Conference had not been reconciled at the time of the Conference; therefore, some numbers will change in the current statement.

As of July 18, 2008, the total amount in the Money Market and Checking Accounts = \$61,285.65.

The Audit Committee wishes to thank Harry Wales for his diligence and commitment to the Conference.

Respectfully Submitted,

John Vincent (WI), Chairperson

NATIONAL CONFERENCE OF STATE SOCIAL
SECURITY ADMINISTRATORS

Financial Report As Of July 18, 2008 and September 3, 2008

Balance in Checking July 2007 \$ 25,847.13

Additions:

Interest earned	\$	45.07	
Transfers from Money			
Market Account	\$	19,283.80	
State Dues	\$	1,050.00	
Conference registrations - 2007	\$	2,394.00	
Conference registrations - 2008	<u>\$</u>	<u>11,943.00</u>	
Total Additions			\$ 34,715.87

Deductions:

Visa Machine Rental	\$	749.01	
Reimburse for Gifts	\$	55.90	
Refunds for 2007 conference fees and meals	\$	1,012.00	
Costs for 2007 conference	\$	21,969.48	
Costs for 2008 conference	\$	29,873.39	
Travel reimbursements	\$	5,847.85	
Overnight Mail Charges	\$	159.89	
IRS Determination (EIN) Cost	\$	750.00	
Web site Hosting Costs	\$	99.00	
Misc. and Fees to close accounts	<u>\$</u>	<u>12.49</u>	
Total Deductions			\$ 60,529.01

Balance in Checking July 2008		<u>\$ 33.99</u>	
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Balance in Money Market account July 2007 \$ 37,612.79
(Includes \$10 in reserve)

Additions:

State Fees	\$	5,100.00	
Conference Registrations - 2007	\$	900.00	
Conference Registrations - 2008	\$	14,464.00	
Dividends Earned	\$	1,462.77	
Total Additions			\$ 21,926.77

Total Deductions:		
	Fed Ex Charges	\$ 252.25
	Transfers to Checking	<u>\$ 17,194.33</u>
	Total Deductions	\$ 17,446.58
Total amount in Money Market		<u>\$ 42,092.98</u>
Total Checking and Money Market Balance		<u>\$ 42,126.97</u>



NATIONAL CONFERENCE OF STATE SOCIAL SECURITY ADMINISTRATORS

58th Annual Conference
LOUISVILLE, KENTUCKY
July 27 - 30, 2008

Constitution and By-Laws Committee Report

Date: August 23, 2008
To: Linda Yelverton, Secretary NCSSSA
From: Michele Briggs, Chairperson
Constitution and By-Laws Committee
Subject: Constitution and By-Laws Committee

The constitution and By-Laws Committee had a suggestion submitted this year. If the NCSSSA were to dissolve, what would be the exit strategy. The following is the proposed addition:

Section 8. No part of the assets of this Conference, nor any income or gain there from, shall inure to the benefit of its members in the event of dissolution of this Conference. If for any reason the purposes of this Conference shall become impossible to fulfill, the assets remaining after all liabilities and obligations have been paid, satisfied and discharged, shall be distributed equally among the paid participating States in the dissolution fiscal year.

The proposed change was submitted and voted upon at the closed business session held on Wednesday, July 30 2008.



NATIONAL CONFERENCE OF STATE SOCIAL SECURITY ADMINISTRATORS

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July 27, 2008

Government Affairs Committee Report

The purpose of the NCSSSA Government Affairs Committee is to: Serve as technical resource and informational conduit between NCSSSA members and Federal officials. Evaluate, propose, lobby and advance NCSSSA positions regarding changes to Social Security and employment tax programs transcending policies, procedures, forms, etc.

Committee Members: Karen Park, Or; David Breckenridge, Oh; James Driver, Ky; Maryann Motza, Co; Nick Merrill, IL and Dean Conder, CO, Chair.

The Government Affairs Committee was active this year, having accomplished the following:

Held five conferences calls from October 1, 2007, through July 7, 2008. These calls established and pursued the following:

- Encourage more IRS participation in the annual conference. David and Nick contacted the FSLG and Treasury Counsel to encourage their participation and ascertain any barriers to their full participation in the conference.
- IRS Telephone forums to continue. Dean contacted FSLG (Sunita) to ensure this education opportunities continue and develop topics.
- The monitoring of Social Security issues such as universal coverage and WEP/GPO is within the purview of the Legislative Committee.
- Dean put out "final call" on the Google group for Pub. 963 Edits. Edits received by and provided to IRS.
- IRS's refusal to accept retroactive dollars for retroactive coverage.
- Karen will try to locate a letter from SSA indicating that pre-87 accounts and contributions are balanced and the state has no liability. Due to the nature of the issue, it was decided that the best that the NCSSSA can do was provide sample documents to state administrators wanting to pursue this issue.
- Agreed to accept the invitation of the Government Finance Officers Association (GFOA) to join them and other organization on issue / position papers.

NCSSSA's participation in the Public Pension Network provided it with the platform to pursue items at the federal level. Many thanks to Dr. Motza and the Legislative Committee for providing the conference with this platform.

Dean Conder, CO
Chairperson



NATIONAL CONFERENCE OF STATE SOCIAL SECURITY ADMINISTRATORS

58th Annual Conference
LOUISVILLE, KENTUCKY
July 30, 2008

History Committee Report

The History Committee's purpose is to preserve the history of the NCSSSA. The chairperson is responsible for preparing a summary of the Conference proceedings. For the 57th annual meeting held in Anaheim, California the committee prepared the Proceedings Book and provided it to members on CD. The proceedings book on CD was also sent to Mr. Larry DeWitt, SSA Historian on December 26, 2007.

I would like thank Dean Conder (CO), and James Driver (KY) for serving on the History Committee. I also want to send a special thank you to my assistant, Angie Dowdy, for all her time and effort which was greatly appreciated.

Respectfully submitted,

Linda Yelverton (LA)
History Committee Chairperson



NATIONAL CONFERENCE OF STATE SOCIAL SECURITY ADMINISTRATORS

58th Annual Conference
LOUISVILLE, KENTUCKY
July 30, 2008

Hospitality Committee Report

The 58th annual meeting of the National Conference of State Social Security Administrators was held at the Seelbach Hilton Hotel in Louisville, Kentucky, July 27 through July 30, 2008.

The Hospitality Committee attempted to provide members and guests with a relaxing place to reminisce with old friends, meet new members and renew working relationships with federal officials. It is hoped that the hospitality and fellowship provided at this year's conference made each attendee's stay a pleasant one.

I would like to thank Harry Wales (WY), Deb Bourbeau (NH), Connie Eggen (KY) and Laquitta Heard (OK) for serving on the Hospitality Committee. A special thank you is extended to everyone who was not on the Committee but helped in the Hospitality Suite. Their time and efforts are greatly appreciated.

Respectfully submitted,

Linda Yelverton (LA)
Committee Chairperson



NATIONAL CONFERENCE OF STATE SOCIAL SECURITY ADMINISTRATORS

58th Annual Conference
LOUISVILLE, KENTUCKY
July 30, 2008

Internet Committee Report

- The NCSSSA web site has been redesigned.
- Roster changes for State Administrators and Social Security Regional contacts are current as of July 2008.
- Executive committee, past conference, and past president have been updated through July 2008.
- 2008 conference presentations have been add to the Conference Presentations page.

Respectfully submitted,

Tammy Taylor

Internet Committee Chairperson

Committee Members:

Tammy Taylor, KY - Chairperson
Michelle Baxter, WI
Kathleen Baxter, AL
Teresa Commeau, NH (retired)
Angie Dowdy, LA



NATIONAL CONFERENCE OF STATE SOCIAL SECURITY ADMINISTRATORS

Legislative Committee Report 2007-2008 Conference Year July 27, 2008 Louisville, Kentucky

The purpose of the NCSSSA Legislative Committee is to: maintain, assess, and disseminate proposed legislative, policy, or regulatory changes affecting Social Security and employment tax programs. As needed, testify on behalf of the NCSSSA before Congress or in Federal forums, representing the NCSSSA public sector position.

The Legislative Committee was very active this year, having accomplished the following:

- Held seven (7) conference calls from October 1, 2007, through July 7, 2008. During the first conference call (held October 1, 2007), it was decided that the most efficient way to approach the Committee's responsibilities was to divide up the workload and assignments among all Committee members.
- Established a networking/liaison relationship with ten (10) organizations that have similar issues and concerns to NCSSSA, i.e.:
 - Senate Finance Committee – Maryann and Dean.
 - House Ways and Means Committee – Maryann and Dean.
 - Government Finance Officer's Association (GFOA) – Maryann.
 - National Governor's Conference (NGA) – Angie.
 - National Association of Counties (NAC) – Angie.
 - National Conference of State Legislatures (NCSL) – Dean.
 - National League of Cities (NLC) – Michelle
 - State Auditors, Comptrollers and Treasurers (SACT) – Michelle.
 - National Conference of Public Employees Retirement Systems (NCPERS) – Nick.
 - National Association of State Retirement Administrators (NASRA) – Nick.
- Between conference calls, informational e-mails and reports from the above organizations as well as the Public Pension Network (discussed in depth, below) were shared with members of the Legislative Committee and the NCSSSA President and First Vice-President.
- Drafted a letter for NCSSSA President James Driver to send to GFOA regarding possible partnership between NCSSSA and GFOA on legislative matters (see attached letter, dated October 23, 2007). The response to the October 2007 letter came from Ms. Barrie Tabin-Berger, Assistant Director, Federal Liaison Center, GFOA, suggesting that it would be valuable for NCSSSA to become a member of the Public Pension Network (at no cost to NCSSSA).

The Public Pension Network consists of a group of organizations that lobby Congress and Federal agencies regarding many issues with which NCSSSA members are also concerned. Among participating organizations in the Network, in addition to the GFOA, are: National Conference of Public Employees Retirement Systems (NCPERS), National Association of State Retirement Administrators (NASRA),

National Council on Teacher Retirement (NCTR), National Association of Government Defined Contribution Administrators (NAGDCA), and the National Conference of State Legislatures (NCSL).

Meetings of the Network are held regularly in Washington, D.C., but they can include people in the discussions via conference calls. Ms. Tabin-Berger suggested that it might be best to limit NCSSSA's initial involvement to a small number of representatives, so James Driver and Maryann Motza agreed to have the following people represent NCSSSA at this time:

- Dean J. Conder, Immediate Past President, NCSSSA
- James Driver, President, NCSSSA
- Maryann Motza, Legislative Committee Chair, NCSSSA

At least one of them participated in all Network calls and kept NCSSSA members, especially the members of the Legislative Committee and the NCSSSA leadership, apprised of developments.

Becoming a member of the Network enabled NCSSSA to accomplish three key goals:

- (1) Get a sense of what's happening at the Federal level on legislative and regulatory matters that involve issues of concern and importance to public pension systems and state and local government employers and employees;
- (2) To give NCSSSA a forum to run our ideas past members of the Network before pursuing them with Congress or other appropriate avenues; and
- (3) Voice our opinions about policy issues that impact State Social Security Administrators and state and local government employers and employees.

As a member of the Network NCSSSA has joined in on several major policy statements that were submitted to Congress (copies of which are attached to this report), including:

- February 22, 2008, letter to Congress requesting a needed technical correction to the Pension Protection Act (PPA) of 2006 to ensure restrictions aimed at issues in the ERISA plan setting do not impose benefit cuts on employees in governmental defined benefit plans.
- June 17, 2008, letter to Congress to set the record straight with regard to the long-term viability and strength of State and local government employee retirement systems. The letter noted that recent press articles have used inappropriate and incomplete information, and muddled pension and healthcare liabilities, to distort the truth of public pension finance. Independent sources, such as the U.S. Government Accountability Office (GAO) and the Center for Retirement Research at Boston College (CRR), have found the vast majority of public sector pension plans to be sound and on track to meet their future obligations.
- July 10, 2008, letter to Congress commending the Joint Economic Committee for examining the need to strengthen retirement security and economic growth in our country. The negative national savings rate, lack of pension coverage and participation in many parts of the private sector, and number of baby boomers that are currently ill-prepared for retirement, will place increased strain on our public assistance programs and our economy. The letter further noted that while pensions are seriously on the decline in most sectors of the workforce, State and local government employee pensions continue to provide a modest, secure benefit to those who spend a career in public service—providing for public

safety, protecting the homeland, caring for the sick, and educating our children. The management of public pension assets also promotes economic growth and vitality. Through their size, broad diversification, and focus on long-term investment returns, public pension funds stabilize and add liquidity to the nation's financial markets. They additionally distribute consistent and inflation-protected revenue streams to local communities throughout the nation.

- Drafted written comments for NCSSSA President James Driver to send to the U.S. House Ways and Means Committee's Subcommittee on Social Security's Hearing on Social Security Benefits for Economically Vulnerable Beneficiaries. The letter and attachments, dated January 28, 2008 (attached to this report), were submitted as part of the official record of the House Ways and Means Subcommittee's hearing, which was conducted on January 16, 2008.

As chairperson of the Legislative Committee, I want to personally thank the other members of the Committee for their invaluable contributions and continued support of the efforts of the Committee: Michelle Briggs (AZ), Dean J. Conder (CO), Angie Dowdy (LA), and Nick Favorito (MA).

Respectfully submitted,

A handwritten signature in blue ink, appearing to read "Maryann Motza".

Maryann Motza (CO), Chairperson
NCSSSA Legislative Committee

Michelle Briggs (AZ)
Dean J. Conder (CO)
Angie Dowdy (LA)
Nick Favorito (MA)



NATIONAL CONFERENCE OF STATE SOCIAL SECURITY ADMINISTRATORS

Membership Committee
58th Annual Conference
July 27 - 30, 2008
Louisville, Kentucky

July 27, 2007

Members of the Membership Committee:
Karen Park (OR) (Chairperson)
Lee OeJabet (SO)
Kathleen Baxter (AL)
John Vincent (WI)
Nick Favorito (MA)

2007-2008's membership committee was comprised of the Regional Vice Presidents.

Throughout the year the committee kept their states up-to-date on issues regarding the conference in general, in particular the annual conference and contacting the states to update the conference contact information.

Respectively Submitted,

Karen Park, State Social Security Coordinator
Oregon State Social Security Administration
Oregon PERS



NATIONAL CONFERENCE OF STATE SOCIAL SECURITY ADMINISTRATORS

58th Annual Conference
LOUISVILLE, KENTUCKY
July 27, 2008

Nominating Committee Report

NCSSSA 2008-09 Officer Nominations

President:	Carolyn Fry
Vice President:	Linda Yelverton
Secretary:	Angie Dowdy
Treasurer:	John Vincent Vandy DeVore

Thank you,

Harry Wales
NCSSSA Nominations
Committee Chairman
July 2, 2008



NATIONAL CONFERENCE OF STATE SOCIAL SECURITY ADMINISTRATORS

Program Committee Report
2007-2008 Conference Year
July 27, 2008
Louisville, Kentucky

'IN THE SPIRIT OF COLLABORATION RACING FOR EXCELLENCE'

The Program Committee is responsible for preparing and conducting the annual conference for State and Federal officials; educating and informing participants of issues regarding Social Security Coverage and Taxation affecting State and Local Governmental Employers and conducting business of the State Social Security Administrators who represent their respective states.

The 2007-2008 National Conference of State Social Security Administrator's conference was held July 27-30, 2008 at the Seelbach Hilton Hotel in Louisville, Kentucky.

The committee held monthly conference calls and established sub-committees to take ownership of the various tasks associated with preparing for and conducting the annual conference.

Sub Committees and Responsibilities

Annual Conference Call; Theme, Theme Logo; Program Agenda Preparation; Topics and Speakers, Conference Meeting Set Ups; Guest Speakers; Honor Guard; Evaluation Forms; Registration Bags and Gift Items; Kentucky Materials for Registration Bags; Donations, Drawings; Menus; Transportation; Monday Night Activity (Kentucky Derby Museum); Hotel Contract (Seelbach Hilton); Budgeting; Registrations; Hotel Reservations; NCSSSA Web Site; Power Points; Computer Set Ups.

Special "Thanks" to each Program Committee Member for taking on their share of this tremendous project to move towards making this year's conference an excellent one!

Respectfully submitted,

Carolyn J. Fry (TX), Chair
NCSSSA Program Committee

NCSSSA Program Committee Members

Angie Dowdy, LA
Barry Faison, VA
Harry Wales, WY
James Driver, KY
Karen Park, OR
Laquitta Heard, OK
Linda Yelverton, LA
Michele Briggs, AZ.
Michelle Baxter, WI



NATIONAL CONFERENCE OF STATE SOCIAL SECURITY ADMINISTRATORS

58th Annual Conference
LOUISVILLE, KENTUCKY
July 27, 2008

Resolutions

[Click Here to View Copies of Resolutions](#)



NATIONAL CONFERENCE OF STATE SOCIAL SECURITY ADMINISTRATORS

58th Annual Conference
LOUISVILLE, KENTUCKY
July 27, 2008

Time and Place AD Hoc Committee Report

The Time and Place AD Hoc Committee of the NCSSSA for the 2008 Conference year was comprised of the following state representatives:

Michele Williams, Arkansas (Chairperson)
John Vincent, Wisconsin
Vandee DeVore, Missouri
Angela Dowdy, Louisiana
Debra Bourbeau, New Hampshire

The Committee, when requested, is responsible for the solicitation and screening of bids for future host sites for the Annual NCSSSA Conference. The Committee is also responsible for making recommendations for future sites based on an evaluation of the bids submitted.

During the year there was no activity on the part of the Time and Place AD Hoc Committee to solicit bids for future host sites. As of today, the future Conference sites include:

2009 Chicago, Illinois
2010 Kansas City, Missouri
2011 Madison, Wisconsin

Respectfully Submitted,

Michele Williams (Arkansas)
Time and Place AD Hoc Committee Chairperson



NATIONAL CONFERENCE OF STATE SOCIAL SECURITY ADMINISTRATORS

58th Annual Conference
LOUISVILLE, KENTUCKY
July 27, 2008

TREASURER'S REPORT

July 30, 2008

Financial Reports were prepared by Harry Wales and are attached to the Audit Committee Report.

Harry Wales, Wyoming
NCSSSA - Treasurer 2007 – 2008



NATIONAL CONFERENCE OF STATE SOCIAL SECURITY ADMINISTRATORS

**58th Annual Conference
LOUISVILLE, KENTUCKY**

July 30, 2008

Secretary's Report

Angie Dowdy and I compiled the 57th Annual NCSSSA Proceedings Book which was held in Anaheim, California! We burned the book to CD's and mailed a CD to all states. An abbreviated version was placed on the www.ncsssa.org website.

I want to express my special thanks to Karen Park and Angie Dowdy for their hard work. Karen and Angie have put in many hours of work and helped make the 58th Annual NCSSSA Conference a success. I also want to thank Teresa Commeau for maintaining the NCSSSA Website.

**Linda Yelverton (LA)
NCSSSA Secretary**



NATIONAL CONFERENCE OF STATE SOCIAL SECURITY ADMINISTRATORS

58th Annual Conference
LOUISVILLE, KENTUCKY
July 30, 2008

Regional Vice-President's Report: Region I

Attending this year's Conference from Region I were Nick Favorito, Esq. (MA), the newly appointed Gayle Mambro-Martin, Esq. (RI) and retiree Teresa Commeau (NH).

The inconsistent participation from among the Region's states was discussed as well as possible ways to address it despite e-mails and correspondence being sent out periodically and in connection with the Conference.

The SSA Region I Employer Service Liaison Officer also attended the conference and offered to participate in any meetings amongst the Region's administrators that were scheduled.

Mr. Favorito was nominated to continue to serve as the Regional Vice President for the upcoming year.

Nick Favorito, Massachusetts
Region I Vice-President



NATIONAL CONFERENCE OF STATE SOCIAL SECURITY ADMINISTRATORS

58th Annual Conference
LOUISVILLE, KENTUCKY
July , 2008

Regional Vice-President's Report: Region II

As a group we discussed the items suggested by the President, James Driver. One was how to notify and educate inactive states. We suggested sending letters and facts sheets, creating a newsletter, visits to states, round table discussions with state and reps from NCSSSA, SSA, IRS, and use of conference groups, ie. NASACT, NASC, Public Pension Network, etc. We also discussed splitting the regions into groups that coincided with the SSA regions. The idea of a Regional Junior VP was considered such that a person could be “groomed” for the Regional VP position much like the recommended Junior VP position. Kathleen Baxter, Alabama was elected to Regional VP and Vernon Bush, Tennessee offered to assist. Out of the 13 states included in Region II, 6 attended this meeting and 7 attended the conference.

In attendance for the conference were the following:

Alabama
Georgia
Kentucky
Mississippi
Pennsylvania
Tennessee
Virginia

The states that were not represented were the following:

Delaware
Florida
Maryland
North Carolina
South Carolina
West Virginia

Region II Vice President Kathleen D. Baxter



NATIONAL CONFERENCE OF STATE SOCIAL SECURITY ADMINISTRATORS

58th Annual Conference
LOUISVILLE, KENTUCKY
July 30, 2008

Regional Vice-President's Report: Region III

Region III held its regional caucus on Sunday, July 27, 2008

States Represented

Of the ten states in Region III, there were a total of six representatives from four states in attendance. The members in attendance included:

Illinois	Nick Merrill
Iowa	Danielle Huffine
	Kurt Hiatt
Missouri	Vandee Devore
Wisconsin	Michelle Baxter
	John Vincent

The following states were not able to attend this year's conference:

Indiana
Kansas
Michigan
Minnesota
Nebraska
Ohio

Topics Discussed

General discussion took place, to include how the SSA was taking a closer look at new entities being considered as a public entity.

Michelle Baxter of Wisconsin was re-elected as the Region III Vice President for the 2008-2009 year.

Respectfully Submitted,

John Vincent
Region III Vice President
2007-2008



NATIONAL CONFERENCE OF STATE SOCIAL SECURITY ADMINISTRATORS

58th Annual Conference
LOUISVILLE, KENTUCKY
July 30, 2008

Regional Vice-President's Report: Region IV

Region IV was represented by 9 of the 11 member states. Montana and North Dakota were not in attendance at this year's conference.

The regions were directed to discuss three items of concern by the Executive Committee:
Creation of an educational team, holding regional meetings, and executive committee succession plan.

1. The creation of an educational team to visit States which have new or inactive administrators. The session would be a ½ day meeting with the NCSSSA, SSA, IRS, the State Administrator and that person's higher up.

The members present support the addition of an education committee but are concerned over the associated costs. Would the inviting State be willing to pay a portion of the travel costs? Should a set fee be charged?

2. Regional Meetings for training and discussion within the NCSSSA regional members.

The members are concerned about the amount of travel involved within our region. Most of our states are very large and would require many hours of travel to get to a central location, usually more than one day. We would be willing to hold scheduled conference calls rather than travel.

3. Executive Board Succession Plan, addition of a Junior Vice President (2nd VP).

Members support the addition of a 2nd vice president with the realization of a possible four year commitment. This position would require travel to the spring meetings and possibly to the upcoming conference location. Additional travel costs may have to be included in the budget in order to add this position beginning in 2009-2010.

4. Other regional concerns.

One state has been receiving requests from their parallel SSA office asking for copies of original amendment/modification for an entity when submitting a modification after a referendum. Some states send copies of the amendment to the original agreement where the entities were originally added, others do not and are not requested to by SSA.

Lee DeJabet
Region IV Vice-President



NATIONAL CONFERENCE OF STATE SOCIAL SECURITY ADMINISTRATORS

58th Annual Conference
LOUISVILLE, KENTUCKY
July 27, 2008

Regional Vice-President's Report: Region V

Region V held its regional caucus on Sunday, July 27, 2008

States Represented

Of the 8 states in Region V, there were a total of 7 representatives from 6 states in attendance. The members in attendance include:

Kay Gouyton & Pat Shier, Alaska
Michele Briggs, Arizona
Marion Montez, California
Rita Foltman, Idaho
Karen Park, Oregon
Kim Smith, Washington

The following states were not able to attend this year's conference:

Hawaii and Nevada

Topics Discussed

Region V was represented by six states this year. I'm proud to report Region V has increased it's participation in the conference this year from three states to six.

Washington State will be going through a transition at the end of 2008, moving the program from the Employment Security Department to the Department of Retirement System. Kim Smith from the retirement system attended, jumping in with both feet.

Alaska is back, after five long years, and looking forward to a renewed active role with the conference.

Respectfully Submitted,

Karen Park
Region V Vice President
2007-2008



NATIONAL CONFERENCE OF STATE SOCIAL SECURITY ADMINISTRATORS

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PAST PRESIDENTS

1952-53	William Farris, Tennessee	1981-82	David I. Herbert, Pennsylvania
1953-54	Charles H. Smith, Virginia	1982-83	Carlos A. Gallegos, New Mexico
1954-55	Donald M. O'Hara, Michigan	1983-84	Jim Larche, Georgia
1955-56	Bruce Parkinson, Arizona	1984-85	Daniel J. McAuley, New York
1956-57	Tatum W. Gressette, South Carolina	1985-86	Gary R. King, Maine
1957-58	Steven E. Schanes, New Jersey	1986-87	Dennis B. Snodgrass, Missouri
1958-59	James B. Atlee, Texas	1987-88	Michael K. Blankenship, Illinois
1959-60	Edward W. Bush, Illinois	1988-89	Patrick L. Doyle, Kentucky
		1989-90	Bobby J. Malley, Mississippi
1960-61	W. Frank DeLamar, Georgia	1990-91	James A. Correll, North Carolina
1961-62	Frederick N. MacMillin, Wisconsin	1991-92	Nicholas C. Merrill, Jr., Illinois
1962-63	John F. Sasek, Montana	1992-93	Nicholas C. Merrill, Jr., Illinois
1963-64	B. E. "Bus" Friday., Arkansas	1993-94	Daryl Dunagan, Kentucky
1964-65	William J. Cudding, Pennsylvania	1994-95	Steve Lortz, Nebraska
1965-66	Carl J. Blechinger, California	1995-96	Dawn Evans, California
1966-67	Lawrence L. Farrell, Michigan	1996-97	Johnnie Morales Sr., Texas
1967-68	Murray L. Biegalle, Kentucky	1997-98	Russell Graves, Oklahoma
1968-69	Robert A. Healy, Delaware	1998-99	Charles R. Severn, Idaho
1969-70	Arnold W. Jaeger, North Dakota	1999-00	Donald C. Rohan, Arizona
1970-71	Sidney M. VanDeventer, Oklahoma	2000-01	Doug Peterson, South Dakota
1971-72	Abe Domain, Georgia	2001-02	Maryann Motza, Colorado
1972-73	Fred E. Henne, Arkansas	2002-03	Steve Delaney, Oregon
1973-74	Alta E. Moore, Wisconsin	2003-04	Teresa Commeau, New Hampshire
1974-75	Edward A. Baublits, Colorado	2004-05	Barry Faison, Virginia
1975-76	William J. Joseph, New Jersey	2005-06	Dean Conder, Colorado
1976-77	Harold G. Purser, Oklahoma	2006-07	Dean Conder, Colorado
1977-78	Gerald P. Slaybaugh, Kansas	2007-08	James Driver, Kentucky
1978-79	Edwin C. Gallison, Vermont	2008-09	James Driver, Kentucky
1979-80	Purvis W. Collins, South Carolina		
1980-81	Starlene Mitchell, South Dakota		



NATIONAL CONFERENCE OF STATE SOCIAL SECURITY ADMINISTRATORS

58th Annual Conference
LOUISVILLE, KENTUCKY
July 27-30, 2008

PREVIOUS CONFERENCE SITES

1951 Bloomington, Indiana	1981 Biloxi, Mississippi
1952 Nashville, Tennessee	1982 Hartford, Connecticut
1953 Chicago, Illinois	1983 Portland, Oregon
1954 Baltimore, Maryland	1984 St. Paul, Minnesota
1955 Baltimore, Maryland	1985 Topeka, Kansas
1956 Atlanta, Georgia	1986 Park City, Utah
1957 Denver, Colorado	1987 Myrtle Beach, South Carolina
1958 St. Louis, Missouri	1988 Boston, Massachusetts
1959 Chicago, Illinois	1989 Baltimore, Maryland
1960 Philadelphia, Pennsylvania	1990 Kansas City, Missouri
1961 San Francisco, California	1991 Washington, D. C.
1962 Miami Beach, Florida	1992 Newport, Rhode Island
1963 Billings, Montana	1993 Louisville, Kentucky
1964 Boston, Massachusetts	1994 Olympia, Washington
1965 Milwaukee, Wisconsin	1995 Des Moines, Iowa
1966 Gearheart, Oregon	1996 Denver, Colorado
1967 Fort Lauderdale, Florida	1997 Chicago, Illinois
1968 Tucson, Arizona	1998 Biloxi, Mississippi
1969 San Juan, Puerto Rico	1999 San Antonio, Texas
1970 Louisville, Kentucky	2000 Baltimore, Maryland
1971 Hot Springs National Park, Arkansas	2001 San Diego, California
1972 Seattle, Washington	2002 Rapid City, South Dakota
1973 New Orleans, Louisiana	2003 Portland, Oregon
1974 Sante Fe, New Mexico	2004 Merrimack, New Hampshire
1975 Mobile, Alabama	2005 Denver, Colorado
1976 Las Vegas, Nevada	2006 Williamsburg, Virginia
1977 Kansas City, Missouri	2007 Anaheim, California
1978 Sun Valley, Idaho	2008 Louisville, Kentucky
1979 Williamsburg, Virginia	
1980 Hershey, Pennsylvania	

NCSSSA ROSTER OF OFFICIALS

* Indicates "Working" State Social Security Official

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*Kathleen D. Baxter, Accounting Director (334) 242-4857
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ALASKA - Region V

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*Madison Davis (501) 683-0890
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DELAWARE-Region II

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Carolyn J. Williams (302) 739-4208, ext 3401
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NCSSSA ROSTER OF OFFICIALS

* Indicates "Working" State Social Security Official

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