

**65th Annual
National Conference of State
Social Security Administrators**



**A Venti Cup of Section
218 Knowledge**

**July 26 – 29, 2015
DoubleTree Suites by Hilton
Seattle, Washington**

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Executive Committee

2014 - 2015

PRESIDENT

Vandee DeVore, Missouri

FIRST VICE PRESIDENT

Dr. Maryann Motza, Colorado

VICE PRESIDENT DESIGNATE

James Sawyer, Texas

SECRETARY

Tammy Taylor, Kentucky
2013-2015

TREASURER

Richard Beckstead, Utah
2014-2016

REGIONAL VICE PRESIDENTS

Region 1 – Stephanie Fecteau, Maine
Region 2 – T.J. Reardon, Maryland
Region 3 – Barbara Taylor, Mississippi
Region 4 – Nancy Burklow, Illinois
Region 5 – Karen Lawrence, Oklahoma
Region 6 – Amanda Schmitgen, South Dakota
Region 7 – Pamella Johnson, Oregon

IMMEDIATE PAST PRESIDENT

Rita Foltman, Idaho

Committee Assignments

2014 -2015

AUDITING

Kay Gouyton, AK – Chairperson
Meghann Butler, MT
Madison Davis, AR
Barry Faison, VA
Melanie Piccin, WA
Jim Sawyer, TX

GOVERNING DOCUMENTS

Rita Foltman, ID – Chairperson
Rick Beckstead, UT
Michele Briggs, AZ
Madison Davis, AK
Angie Dowdy, LA
T.J. Reardon, MD
Shirley Sessoms, MS

INTERNET COMMUNICATIONS

Tammy Taylor, KY – Chairperson
Ron Carlson, NE
Vandee DeVore, MO
Barry Faison, VA
T.J. Reardon, MD
Amanda Schmitgen, SD
Barbara Taylor, MS

LEGISLATIVE

Dr. Maryann Motza, CO – Chairperson
Kathleen Baxter, AL
Dean Conder, CO
Vandee DeVore, MO
Angie Dowdy, LA
Mary Griffin, TN
Omar Masood, DE
T.J. Reardon, MD
Jim Sawyer, TX

ELECTIONS

Kevin Mack, NY - Chairperson
Jennifer Berrier, PA
Michele Briggs, AZ
Angie Dowdy, LA
Barbara Taylor, MS

PROGRAM

Maryann Motza, CO - Chairperson
Meghann Butler, MT
Dean Conder, CO
Beth Dillon, MO
Angie Dowdy, LA
Mary Griffin, TN
Danielle Huffine, IA
Melanie Piccin, WA
T.J. Reardon, MD
Jim Sawyer, TX
Kim Smith, WA
Grant Wright, NM

RESOLUTION

Amanda Schmitgen, SD – Chairperson
Paul Brugger, NV
Barry Faison, VA
Barbara Taylor, MS
Tammy Taylor, KY

MEMBERSHIP

James Sawyer, TX – Chairperson
Nancy Burklow, IL
Stephanie Fecteau, ME
Pamella Johnson, OR
Karen Lawrence, OK
T.J. Reardon, MD
Amanda Schmitgen, SD
Barbara Taylor, MS

TIME & PLACE

Meghann Butler, MT – Chairperson
Ron Carlson, NE
Madison Davis, AR
Beth Dillon, MO
Mary Griffin, TN
Danielle Huffine, IA
T.J. Reardon, MD

TRAINING & SUCCESSION PLANNING

Dean Conder, CO – Chairperson
Vandee DeVore, MO
Angie Dowdy, LA
Maryann Motza, CO
Melanie Piccin, WA
T.J. Reardon, MD
Jim Sawyer, TX

NETWORKING SESSIONS

Angie Dowdy, LA – Chairperson
Rick Beckstead, UT
Michele Briggs, AZ
Paul Brugger, NV
Barry Faison, VA
Rita Foltman, ID
Kay Gouyton, AK
Pamella Johnson, OR
Joyce Morgan, FL
Kim Smith, WA
Barbara Taylor, MS

Conference Attendees

2014 – 2015

STATE SOCIAL SECURITY ADMINISTRATORS & STAFF

ALABAMA

Kathleen Baxter
Jamie Jackson

ALASKA

Jim Puckett
Katherine Gouyton - Retiree
Roy Gouyton - Guest
Kay Gouyton - Guest

ARIZONA

Michele Briggs

ARKANSAS

Madison Davis

COLORADO

Maryann Motza
Dean Conder

FLORIDA

Joyce Morgan

IDAHO

Rita Foltman

IOWA

Danielle Huffine
Tina Koenen

KENTUCKY

J.W. Bryan
Tammy Taylor

LOUISIANA

Angie Dowdy

MARYLAND

T.J. Reardon

MICHIGAN

Trista Stine
Brian LaVictoire

MISSISSIPPI

Shirley Sessoms
Barbara Taylor

MISSOURI

Vandee DeVore

MONTANA

Meghann Butler
Cheryl Grey

NEBRASKA

Ron Carlson

NEW MEXICO

Grant Wright

NEW YORK

Kevin Mack
Michael Bazicki

OHIO

David Rust

OREGON

Pamella Johnson
Karen Park - Retiree

SOUTH DAKOTA

Amanda Schmitgen

TEXAS

Jim Sawyer

UTAH

Rick Beckstead

VIRGIN ISLANDS

Grace Fahie
Bernadette Benjamin

VIRGINIA

Barry Faison
Edith Faison - Guest

WASHINGTON

Kim Smith
Melanie Piccin
Eleanor Conway

WEST VIRGINIA

Mark Shelhammer

WISCONSIN

Gene Janke

WYOMING

Gwynne James

Conference Attendees

2014 – 2015

FEDERAL OFFICIALS

SOCIAL SECURITY ADMINISTRATION

Regina Bachini
Sarah Berry
Amy Bland
Mark Brown
David Burdett
Sue Bussman
Shawn Cole
Tara Czekaj
Breyan Foltz
John Fox
Glenn Haas

Natalie Jemison
Kirk Jockell
Armond Joseph
Chris McDermott
Jorge Ortiz
Benjamin Prevas
Elizabeth Rothstein
Paul Sachelari
Fred Sanchez
Shalyn Timmons
CaRita Timms

INTERNAL REVENUE SERVICE

Clark Fletcher
Dwayne Jacobs
Paul Marmolejo

SOCIAL SECURITY ADMINISTRATION RETIREES

Ken Anderson

July 30, 2014

**1st Executive
Committee Meeting**

Closed Meeting

July 25, 2015

**Last Executive
Committee Meeting**

Closed Meeting

July 26, 2015

**1st
Business Session**

Closed Meeting

July 29, 2015

**2nd
Business Session**

Closed Meeting

Conference Presentations

Moderator Reports

Copies of the Presentation are located on the NCSSSA website:

<http://www.ncssa.org/conferencepresentations.html>



65th Annual Conference
Seattle, Washington
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July 27, 2015

Session Title: Introduction To Public Pension Plans
Speaker: Michael W. Spaid, Internal Revenue Service
Moderator: Mark D. Shelhammer

Michael defined Public Retirement Systems (aka FICA Replacement Plans) as outlined in IRC 3131(b)(7)(F) and Regulation 31.3121(b)(7)-2. Interestingly, about a quarter of the nation's public employees (mostly local government police, firefighters and teachers) are not covered for Social Security.

He went on to explain that the two types of public retirement systems that meet the minimum requirement are defined contribution plan and defined benefit plan. To avoid confusion, he explained that ERISA, (the tax treatment of contributions on benefits of employee plans) are irrelevant to these coverages. He then went into greater detail describing both Defined Contribution Plans as well as Defined Benefit Plans.

Once the various plans were fully discussed, he turned his attention to the Qualified Participant. He discussed the regulatory requirements for employees to be excluded from mandatory coverage, and described the tests/conditions that may be used to determine participation in either plans. He then discussed an in depth look into qualifications for Part-Time Employees, Seasonal Employees, Temporary Employees, the Alternative Lookback Rule, Former Participants, and the DREADED....REHIRED ANNUITANT!

The presentation then turned to Deferred Retirement Option Plans which Michael, defined and described in detail. Michael finished his presentation by discussing Section 414(h)(2) Pickup Arrangements and Hybrid Defined Benefit Plans. A question/answer session was held to ensure understanding.

Michael's presentation was complete, well organized and gave NCSSSA members a great deal of useful information that we can use to help guide our "customers" in regards to FICA Replacement Plans.



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Session Title: Joint Ventures

Speaker: Mark Brown, SSA OISP, HQ; Fred Sanchez, SSA, OGX, Chicago

Moderator: Kevin Mack, NY



65th Annual Conference
Seattle, Washington
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July 27, 2015

Session Title: Majority Vote Referendum Educational Presentation and Social Security/Medicare Benefit Implications

Speaker: Kirk Larson, SSA – Public Affairs Representative

Moderator: Melanie Piccin

Kirk Larson started off with a brief history of Social Security including the effective dates of Retirement insurance, Survivors insurance, Disability insurance, Medicare, SSI, and Medicare Part D.

The following topics were addressed:

- ✓ Social Security is not meant to be the only source of income for retired Americans
- ✓ Who gets Social Security
- ✓ Social Security Trust Funds – state of
- ✓ How a benefit is earned
- ✓ Benefit differs depending on when a person starts collecting
- ✓ Using the SSA Online's Retirement Estimator
- ✓ Windfall Elimination Provision
- ✓ Working after worker starts collecting Social Security Benefits
- ✓ Disability Benefits
- ✓ Benefits for family members
- ✓ Government Pension Offset
- ✓ Medicare Benefits



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Session Title: State Outreach Panel

Speaker: W. Grant Wright, New Mexico; Dean Conder, Colorado; Danielle Huffine, Iowa; Meghann Spring, Montana.

Moderator: Meghann Spring, Montana

A panel presentation was constructed and geared towards new SSSA's and being a resource for those wanting more information on personalized out-reach within our states.

Grant opened the presentation with discussion on the various agencies and departments that we all work with, across the nation. We all have a special uniqueness and duties as assigned. Grant works in the NM Retirement system, 100,000 employees and 300 public employers. [Dean is with Co. Labor & Employment, Danielle is with Public Employees' Retirement System and Meghann is under Department of Administration.]

Grant has guides available for entities (on-line) and paper-versions for when he can't travel. Please note: New Mexico is a divided and majority vote state.

Danielle spoke about Iowa being an Absolute Coverage State, some of their out-reach with Kansas City SSA to create a new police officer modification as well as outreach to the entities that were to vote in referendum.

Dean followed with discussion on finding entities within your state. They work with the Department of Local Affairs to track and discover when filings are created to create a new entity. DoLA contacts Dean/Maryann.

Due to a reduction in budget, they no longer travel as much. They would invite other folks to do presentations (Ex: ICE), so that others would be interested in discussions. He suggested tapping local associations, such as League of Cities, Association of Counties, etc.

(Rita discussed the 8821 form from the IRS, for discussion with an entity. (She has them sign it immediately.)

Meghann discussed internet usage and the recent update for the State Financial Services Division website (SSSA included.) Meghann plans on at least updating the Fact Corner at least quarterly or sooner if needed. This is a work in progress and there is hope for a counter on the page, to count "hits."

We also suggested other websites to go visit, compare and utilize for each states outreach and education.

In August: www.nmpera.org (New Mexico is revamping their website, currently.)

<http://sfsd.mt.gov/SSSA> Montana

<http://pess.cdle.state.co.us/> Colorado

www.ipers.org Iowa

<http://www.okdhs.org/programsandservices/ss/default.htm> Oklahoma

<http://www.treasury.louisiana.gov/Home%20Pages/SocialSecurity.aspx> Louisiana

<http://oa.mo.gov/accounting/state-social-security-administrator> Missouri

Respectfully Submitted,



Meghann Spring, State Social Security Administrator

Dept of Administration

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**65th Annual Conference
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Date of Presentation: July 27, 2015

Session Title: Wage Reporting 101: W-2s, 941s and 1099s

Speaker: Dwayne Jacobs and Clark Fletcher

Moderator: Joyce W. Morgan, PhD

Slide Presentation was introduced by Dwayne Jacobs and presented by Clark Fletcher.

Discussion points were mostly covered by Clark with Dwayne's assistance:

- How to complete the Form 941-X.
- How to file a claim for the employer-only and for the employer and employee.
- Several questions asked about "proactive claim" and the employee consent forms.
- The data needed for each individual's documentation when making adjustments.



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Tuesday, July 28, 2015

Session Title: Covering Ineligibles and Optionals

Speaker: John Fox, Esq. SSA OGC/Kansas City

Moderator: Pamela Johnson, OR

“Everything should be made as simple as possible, but not simpler”

Albert Einstein (maybe)

This presentation was met with many questions and a spirited audience involvement. The take-away from Mr. Fox’ session was the boiling down of several key points including ineligibles and optionals are people.....not positions. Ineligible and optional status is based on timing (what is the employee’s status on the relevant date?)

Key definitions noted include:

Ineligible – “an employee who, on first occupying a position under a retirement system, is not eligible for membership in that system because of a *personal disqualification* like age, physical condition, or length of service” 20 C.F.R. Section 404.1208(a)

Optional – “employee in a position covered by a retirement system who had the option to join the system on the date he or she first occupied the position” Handbook Section 30001.334.B

This session brought simplicity and clarity to a potentially baffling topic.



65th Annual Conference
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July 27, 2015

Session Title: Legal Framework Update, including New Information About Charter Schools

Speakers: Ms. Susan Bussman, SSA/HQ; Mr. Anthony J. Roda, Esq., Williams & Jensen, PLLC.; Mr. Benjamin Prevas, Esq., SSA/HQ/OGC

Moderator: Maryann Motza, PhD

Ms. Susan Bussman, Staff Director, Retirement and Survivors Insurance Branch Office of Legislation and Congressional Affairs, U.S. Social Security Administration, addressed current or anticipated legislative proposals related to the major things that always concern NCSSSA's members. See the attached PowerPoint slides (see Appendix A) where she addressed the following:

- 1) Windfall Elimination Provision "WEP" (including, H.R. 711, 114th Congress, co-sponsored by Representatives Brady and Neal).
- 2) H.R. 973, introduced on February 13, 2015, by Congressman Rodney David and an identical bill (S. 1651) which was introduced on June 23, 2015, by Senator Sherrod Brown, both of which would repeal both WEP and the Government Pension Offset "GPO."
- 3) Issues related to the imminent exhaustion of the Disability Insurance (DI) Trust Fund; reserves are scheduled to be depleted in December 2016.
- 4) Proposals included in the President's budget that may impact state and local governments.
- 5) No bills have been introduced in the 114th Congress that would impose universal (mandatory) Social Security (OASDI portion) on all non-covered state and local government employees (either for new hires only and/or for all active employees).

Copies of the PowerPoint slides from Ms. Bussman's presentation are attached to this report.

Mr. Roda, Partner, Williams & Jensen, PLLC., addressed the following:

- 1) H.R. 2618, 113th Congress, to allow Medicare-only opt in by state and local government employees.
- 2) Summarized Public Law 114-14 and Public Law 114-26 that affected Federal tax treatment of survivor and retirement benefits of public safety officers.
- 3) The Annuity Accumulation Plan for public employees which was proposed by Senator Orrin Hatch (S. 1270, 113th Congress).
- 4) Employer pick-up issues associated with Internal Revenue Code Section 414(h)(2) (H.R. 205; 113th Congress).

Copies of the PowerPoint slides for Mr. Roda's portion of the legislative and regulatory update are attached to this report as Appendix B.

Mr. Roda also reviewed and discussed recent documents that provide some guidance about charter schools from the IRS's and Tax Exempt/Government Entities' Counsel's perspectives. Mr. Roda summarized and analyzed information issued by TE/GE Counsel both for the Employee Plans and Federal State Local Governments sections that address how each treat political subdivisions of the states vis-à-vis their particular sections of federal law. Mr. Roda discussed the recent Notice 2015-07 that addressed proposed new regulations related to IRC Section 414(d). Another document that was discussed and analyzed by Mr. Roda is the redacted version of the Memorandum, dated January 23, 2015, issued by TE/GE Counsel wherein that office provided advice to a "Wholly-Owned Instrumentality Status of X Charter School" vis-à-vis determining the FICA tax liability under Internal Revenue Code section 3121(b)(7)(F). Mr. Roda explained that the redacted Memorandum cannot be used as definitive and controlling, but the analysis and tests TE/GE Counsel applied can be instructive for all State Social Security Administrators and their state and local government customers. This portion of the session involved comparing and contrasting the similarities and differences in how TE/GE Counsel view these issues. It gives State Administrators guidance in what issues to look for in their states related to treatment of political subdivisions, especially charter schools, which vary significantly from state to state. Copies of the materials Mr. Roda discussed related to charter schools as well as the PowerPoint slides that accompanied his presentation are attached to this report as Appendix B.

Mr. Benjamin Prevas, Esq., Attorney, Office of Program Law, Office of the General Counsel, U.S. Social Security Administration, compared and contrasted the University of Texas and the University of Minnesota (Mayo) cases. This was timely because the U.S. Supreme Court recently declined to review the Fifth Circuit's affirming of the District Court's decision in the University of Texas System case which discussed the student exclusion provision of Section 218 of the U.S. Social Security Act as it applies to medical residents. Copies of both court decisions are attached to this report as Appendix C.



**65th Annual Conference
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July 28, 2015

Session Title: IRS Risk Areas

**Speaker: Dwayne Jacobs, IRS FSLG; Clark Fletcher, IRS FSLG; Paul Marmolejo,
IRS FSLG**

Moderator: Angie Dowdy, LA



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July 28, 2015

Session Title: Differences Between Majority and Divided Vote Referendum Processes and Outcomes
Speaker: Natalie Jemison and Kirk Jockell
Moderator: Kathleen D. Baxter

Majority Vote Referendum was discussed.

Who is eligible?
Retirement System Referendum
Majority Vote Referendum

Who is not eligible?

Who is an Ineligible?

Divided Vote Referendum was discussed.

What Happens if the Majority vote is yes? Or No?

23 Divided Vote Referendum States

Originally a 2 step process

Divided Vote Referendum Requirement

Who is eligible to vote?

Who is not Eligible?

Second Chance

Timeline for Referendum process

National Conference of State Social Security Administrators



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HANDOUTS FOR:

Day/Date/Time of Presentation: Tuesday, July 28, 2015
10:30 to 11:15 am
Location: Phoenix Room

Session Title: Differences Between Majority and Divided Vote Referendum Processes and Outcomes

Speaker: Natalie Jemison, Esq., SSA/OGC/Atlanta; Kirk Jockell, SSA/Atlanta

Moderator: Kathleen Baxter, PhD, AL

Overview and Scope of Topic: This session will explore the legal and practical differences between the majority and divided vote referendum processes. Social Security Administration (SSA) officials will discuss any issues or concerns the Office of General Counsel and Regional Offices have observed related to referendum election information received from the states. This session will include SSA's recommendations for how State Administrators should address those issues, such as suggesting state legislative changes (when and how to identify the necessity of such changes), modifications that might be needed to the State's Master Section 218 Agreement (when and how to identify the necessity of such changes), process improvements, records retention issues and concerns, and so forth.

Both speakers have been invited to address the topic according to the scope and manner in which he/she feels is best so that both the Social Security Administration's and each state's needs are appropriately discussed and considered.

Natalie K. Jemison

**Assistant Regional Counsel
Social Security Administration
Office of the Regional Chief Counsel
Atlanta**

Natalie began working with the Office of the General Counsel, Social Security Administration, Atlanta in March 2001, Natalie's practice areas include: State and Local Coverage, General Law, and Representative Sanctions. Natalie represents the Agency in district court litigation related to disability programs in the Eleventh Circuit. Natalie also serves as a Special Assistant United States Attorney in the Middle District of Florida and the Northern District of Alabama. During her tenure with the Agency, Natalie briefed several appeals before the Sixth and Eleventh Circuit Courts of Appeals. Last year, Natalie presented an oral argument to the Eleventh Circuit Court of Appeals, resulting in a favorable published decision. Natalie also coordinates the Substantive Law meetings to inform the office of new case law and procedures.

Natalie is originally from California and graduated from the University of California at Berkeley, with a Bachelor of Arts degree in Political Science. Natalie received her Juris Doctor from Howard University School of Law. Natalie is married to Danny Jemison and they have three children: Jonathan, Daniel, and Emily.

Kirk Jockell

Kirk Jockell is the Employer Services Liaison Officer (ESLO) for the Social Security Administration's Regional Office in Atlanta, GA. He has been with SSA since April 1998 and has worked in the wage reporting and earnings community for the past fifteen plus years. He operates as the point of contact for all employers (public and Private) within the southeast providing services and information with regard to proper W-2 wage reporting and W-2/941 reconciliation issues. Since 2007, he has served as the region's State and Local Coverage Specialist helping states with issues pertaining to Social Security coverage under Section 218 of the act.

He is a retired Senior Chief from the world's most powerful United States Navy and holds a Bachelor's of Arts in Business Technologies from Saint Leo University and a Master's in Public Administration from Troy State University.

He enjoys writing, reading, sailing, fishing, and scalloping. He has one daughter that has since flown the coop leaving him to live with his wife of 29 plus years, Dixie the dog, and a cat named Stormy that pukes a lot.



65th Annual Conference
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Date of Presentation
July 28, 2015

Session Title: Annexations, Consolidations, and Other Transitions
Speakers: Shalyn Timmons, SSA, OGC, Dallas
Amy Bland, SSA, OGC, Boston
Special Guests – Bubbles and Fluff
Moderator: Barbara A. Taylor, PERS of Mississippi

The listed speakers provided a LIVELY presentation concerning Social Security Section 218 Agreements and Predecessor-Successor Situations. Such Predecessor-Successor Situations discussed during this session included Annexations, Consolidations, Hybrid Consolidations and Miscellaneous Transitions. The presentation featured special guests Bubbles and Fluff (*brought to life by puppeteer Mark Brown, SSA, and Meghann Spring, SSSA Montana*) and included audience participation, demonstrations, and a detailed-specific slide component.

As on topic, the presentation provided:

- Definition of Consolidations, Annexations, Hybrid Consolidations and Miscellaneous Transitions
- Demonstration of Annexation, Consolidation, Hybrid Consolidations and Miscellaneous Transitions
- Description of the how Social Security coverage is affected by Consolidations, Annexations, Hybrid Consolidations and Miscellaneous Transitions
- Useful documentation in determining status of a predecessor-successor situation



National Conference of State Social Security Administrators

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July 28, 2015

Session Title: Modification Process from Beginning to End

Speaker: Mr. Kirk Jockell, SSA/Atlanta

Moderator: Mr. Madison Davis, Arkansas

The focus of this training session was solely on the process of completing a modification from beginning to end. A modification amends a Section 218 Agreement to extend Social Security and Medicare coverage to new groups of employees, identifies new political subdivisions joining a public retirement system, corrects errors in previous modifications, implements changes in Federal or State law.

Mr. Jockell's presentation explained the necessary steps at the U.S. Social Security Administration's Regional Offices when processing a Section 218 Modification from receipt in the mail from a State Social Security Administrator (SSSA) through approval by the Office of General Counsel (OGC) through final approval by the Regional Commissioner to notify the SSSA of the final outcome (or any intermediate communication with the SSSA regarding concerns and issues that are identified along the way).

When preparing a modification:

- clearly state its purpose
 - use the sample language in the exhibits
 - request assistance from the RO if special language is required
 - list all optional exclusions
 - include all statewide optional exclusions, from the original agreement, in each modification.
-

After preparing the modification:

- If the modification is complex or there is a question concerning the legality of any provision request a preliminary review from the Regional Office (RO) through the Parallel Social Security Office (PSSO).
- Submit two original modifications with the pen-and-ink signature(s) of the authorized State official(s) to the PSSO. Provide extra copies if you want more than one signed copy.
- The RO reviews the modification and approves (or denies) coverage SSA decisions are final. A modification must meet the requirements of Federal and State laws.
- The RO specialist requests an OGC legal review of the modification. The RO specialist should follow-up with OGC in 30 days if a response has not been received.
- Upon OGC approval, the RO specialist prepares a notification of approval letter and hand delivers the entire modification packet to the Regional Commissioner, or designated official.
- The Regional Commissioner or designated official must sign the approval letter and all original copies of the modification.

The speaker knowledge and familiarity of the modification process was well-received by conference attendees.

Respectfully Submitted,



Madison Davis, AR
Moderator 2014-2015 Annual Conference



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National Conference of State Social Security Administrators

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HANDOUTS FOR:

Day/Date/Time of Presentation: Tuesday, July 28, 2015

1:15 to 2:30 pm

Location: Phoenix Room

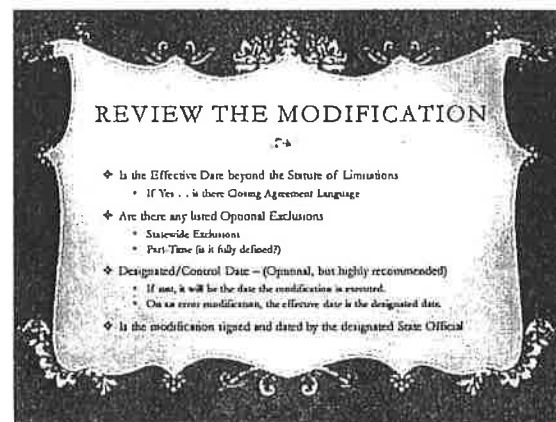
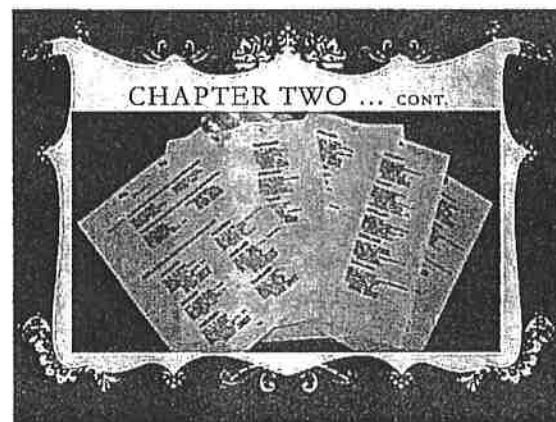
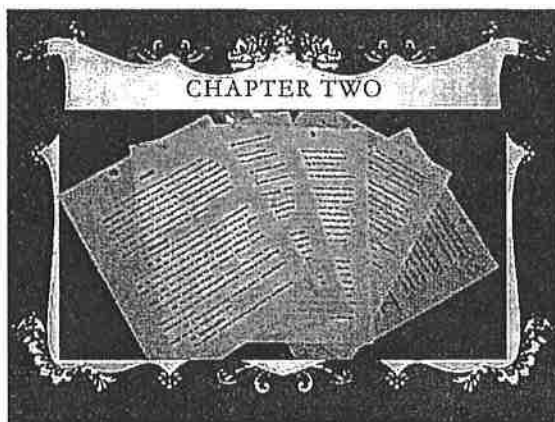
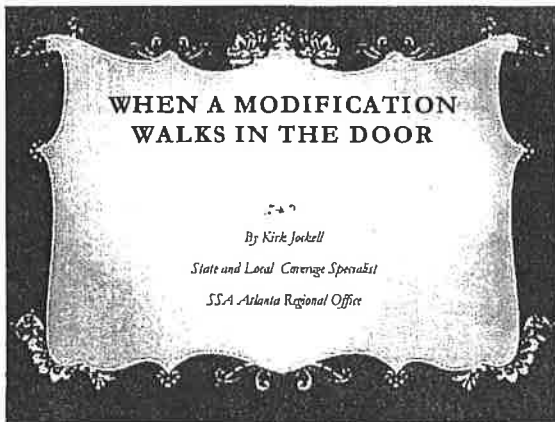
Session Title: Modification Process from Beginning to End

Speaker: Kirk Jockell, SSA/Atlanta

Moderator: Madison Davis, Arkansas

Overview and Scope of Topic: This session will explain the steps at the U.S. Social Security Administration's Regional Offices when processing a Section 218 Modification from receipt in the mail from a State Social Security Administrator (SSSA) through approval by the Office of General Counsel (OGC) through final approval by the Regional Commissioner to notifying the SSSA of the final outcome (or any intermediate communication with the SSSA regarding concerns and issues that are identified along the way). For example, verifying FICA deductions under the stated EIN, confirming authority under state law to conduct a divided or majority vote referendum for the coverage group included in a referendum, etc.

NOTE: Mark Brown will address the issue of problems around modifications associated with part-time employees that do not consistently include a definition of what constitutes "part-time" so Mr. Jockell's presentation can tie back to that discussion as well. That discussion by Mr. Brown is part of the Training & Succession Planning Committee's introduction to Section 218 for all attendees on Sunday, July 26, 2015, from 10:00 am to 1:00 pm.



A LOOK AT THE ENTITY

- ❖ Is the entity seeking coverage a true political subdivision?
 - Documentation about its creation and existence may be needed.
 - Is there already an active modification on record?

EVIDENCE

- ❖ Absolute Coverage Group
 - Minimal evidence needed.
- ❖ Retirement System Coverage Group
 - Referendum Certification (Majority or Divided Vote)
- ❖ Identification Modification
 - Documentation about the entity's new participation in the retirement system.
 - Referendum not required.

EVIDENCE

- ❖ Error Modification
 - Is a Retirement System involved?
 - If so, when did the entity join the Retirement System?
 - When did the error first occur?
 - SSA reports can (with their reason) help with this.
 - If the positions were part of a retirement system at the time the error first occurred, a referendum is needed.
 - If the positions were not part of a retirement system at the time the error first occurred, no referendum is needed.

EVIDENCE

- ❖ Dissolution SL 4000L485
 - The State must submit evidence to support the entity's dissolution, that it no longer exists.
 - Primary Evidence
 - Secondary Evidence

ODDS AND ENDS

- ❖ Modifications Infrequently Received
- ❖ Name Changes SL 4000L475
 - Written notice sent to SSA, Old name, the New name, the Modification effected by the change, legal documentation establishing the change.
- ❖ New Government Components SL 4000L477
 - The State completes and sends the Notification of a New Government Component along with evidence of its creation.

OFF TO OGC

- ❖ The next step is the Office of General Counsel (OGC) for legal review.
- ❖ The OGC review is more detailed. Often additional questions and clarification is needed which requires additional requests for more evidence.





65th Annual Conference
Seattle, Washington
July 26-29, 2015

July 28, 2015

Session Title: Extending Social Security Coverage to Police and Firefighter Positions under a Retirement System

Speakers: John Fox, Esp., SSA/OGC/Kansas City and Fred Sanchez, Esq., SSA/OGC/Chicago

Moderator: Danielle Huffine, Iowa

Mr. Fox and Mr. Sanchez discussed how the states need to proceed to extend SS coverage to the police and firefighters already under a retirement system. Most states need to change legislation and/or complete a modification that allows the state to add the police and firefighters to the State's Section 218 Agreement. A law change in 1994 allowed police and firefighters to be covered; however, most section 218 agreements were never changed. Some states even completed referendums in error. There was also a great deal of discussion on what constitutes a police/firefighter position. This may be established in your statute.

There is a new format (templates) that SSA wants administrators to use and if the original agreement has roman numerals, letters and numbers, you must retain that system in the new modification.

John and Fred went through the processes that the States of Idaho, Iowa, and Michigan had to follow to extend coverage to their police and firefighters.

The templates will be available on the NCSSA website attached to this presentation handout.



A Venti Cup of Section
218 Knowledge

National Conference of State Social Security Administrators

65th Annual Conference
Seattle, Washington
July 26-29, 2015

Tuesday July 28, 2015

Session Title: ACT Committee and Section 218 Council Updates
Speakers: Vandee DeVore, MO, Dean Conder, CO, T.J. Reardon, MD,
Angie Dowdy, LA, Anthony J. Roda, Esq., Williams & Jensen, PLLC.
Moderator: James E. Sawyer, TX

NCSSSA representatives on the ACT Committee and Section 218 Council and provided an overview of the intended roles of each group as well as updates on issues discussed, concerns raised and efforts pursued within each committee to further the cooperative relationship between NCSSSA and our federal partners. Overall, these multiparty groups have made progress in improving interaction and communication between the NCSSSA, Internal Revenue Service and Social Security Administration. We anticipate continued continued positive results based on commitment by all three partners to use these groups as forums for sharing/exchanging information.

Mr. Roda, unfortunately, could not attend the conference, but agreed to call in to provide his insights on new developments, in general, and to discuss legislative changes that might impact our members.



65th Annual Conference Seattle, Washington July 26-29, 2015

July 26, 2015

AD Hoc Committee / Name change

Chair

Michele Briggs, AZ

Committee Members

Tammy Taylor, KY

Joyce Morgan, FL

Ron Carlson, NE

Mary E. Griffin, TN

Barry Faison, VA

Because this topic was brought up in several meetings and conversations, there was a consensus that the idea should be addressed and a recommendation brought to the Executive Committee for consideration. The Ad Hoc Committee was formed by the President with the directive to survey members on their thoughts of a name change while maintaining the NCSSSA branding; research the history of the reason for the current name and see if that still applies; research the implications of a change and any items that would need changed (Constitution, website, 501c6 status, etc); and then recommend one name, if any, to the Executive Committee. The Ad Hoc Committee also had the authority to recommend to the Executive Committee, that no change be made.

The following questions were asked to individuals that represent NCSSSA in outside meetings and conduct daily business for the NCSSSA:

1. What would be the impact regarding our bank accounts? Be specific. Please list what financial accounts we have and what the process would be to change a name of an account (forms, online process, cost time).
2. What supply inventory do we currently have that has our name either spelled out and/or has our acronym? Please list all items, quantities and if possible, cost.
3. Please list any contracts, associations, foundations, etc., we deal with on a regular basis that this change may have an impact on and how we conduct business with our partners. Would this change have a negative impact on our associates (updating their website, brochures, contact information)?

Results:

1.
 - Didn't see this as a big issue and most can be accomplished by simple transfer documents.
 - New paperwork will have to be completed, including new signature cards.
 - Our checks are currently low, so the cost will be approximately \$25.00 to reorder.
 - A new 990-EZ form would have to be filed with the IRS.

2.
 - Supply inventory does not seem to be an issue. Any letterhead, forms, envelopes or other supplies are done electronically and can be updated easily with our current software. There would be no cost.

3.
 - If we're changing one word in the overall name, website changes would be minimal.
 - If the full name were to be changed or the acronym, there would be a great deal more work involved and time.
 - The logo is not a problem as a simple program was used and it would take very little time to create a new logo.
 - Changing one word on websites, publications and forms might be an added burden to our federal partners.
 - Some entities that might be impacted by this change are: IRS, SSA, GFOA and various other pension networks.
 - Didn't see a problem with vendors, contractors and hotels, existing or pending contracts should not be an issue.
 - We need to investigate whether our non-profit standing be jeopardized with IRS.

Results/comments of survey sent to NCSSSA membership:

- We have a total of 30 responses.
- 53% suggested a name change would be appropriate.
- Approximately 37% did not want a name change.
- Proposal is to change "one word" in our name.
- We would need to contact Angie to determine how much print material we actually have to assess loss if we make a change.
- Most of what we do is online, so overall cost may be minimal.
- Not everyone likes change, but change may suggest we're "keeping up with the times."
- Pro name change offered the following:
 - Change "Conference" to Association, Consortium, Committee, Council.
 - The definitions provided suggests a change would better define who we are and what we do.

- Any changes to material would be a one-time change.
- Most material is online, so the fix would be easy.
- Because we are changing one word in the name, the change would not be disruptive.
- Conference = meeting whereas Council represents a group discussion and decision makers.
- Instead of changing our name, change the annual conference name.
- Con
 - Issue is mundane and it's taking away from more important issues.
 - Concerned about the time it will take to change all our material, accounts, etc.
 - If it's not broken, why change it.
 - Not sure the purpose or point of changing our name.
 - Any outside affiliations will be confused by a name change.
 - Some said no, but gave no reason.
 - Staying the same suggests stability.

Summary:

As someone pointed out, there is never a good time for change. Based on the results of our survey and receiving feedback from various individuals throughout our organization, the overall opinion seems to be strong in both directions. If a change were suggested, the change does not have to be accomplished this year and the process could be scheduled out over a period of time so individuals can deal with any unforeseen issues.

If the organization is researching and contemplating a change, a suggestion was made to consider a more aggressive approach and come up with other options or possibly a full name change.

Overall, the topic should be discussed further and if possible, addressed at our next Annual Conference for additional feedback. To end this, I'll summarize what our President stated, "a name change is a very small step and does not speak to the larger issue, which is transforming how our constituents see us."

Recommendation by Ad Hoc Committee:

At this time, do not move forward with a name change until all members of the NCSSSA have a chance to hear and discuss the proposal for the name change.

Respectfully Submitted,

Michele Briggs, Chair
Ad Hoc Committee / Name Change



**65th Annual Conference
Seattle, Washington
July 26-29, 2015**

Governing Documents Committee

Chair

Rita Foltman, Idaho

Committee Members

Rick Beckstead, Utah
Michele Briggs, Arizona
Madison Davis, Arkansas
Angie Dowdy, Louisiana
Thomas J. Reardon, Maryland
Shirley Sessoms, Mississippi

The Governing Documents Committee was created and introduced by an action of the Executive Committee in September 2014. The former Constitution & By-Laws and Policy & Procedures Committees consolidated to form this new Committee. The purpose for the consolidation is to provide NCSSSA with a comprehensive, consistent, and coordinated management process for developing and maintaining the governing documents which include the Constitution & By-Laws, Policy, Mission/Vision/Values Statement, and Standard Operating Procedures.

During the Conference Year, the Committee activities included:

- Six conference call meetings
- Multiple electronic meetings to review and edit governing documents, vote to accept edits and submitting the Committee's recommendations to the Executive Committee.
- Called upon all members for Constitution & By-Laws comments and amendments (through a request from each Regional Vice President to his/her Administrators).
- Called upon each Officer and Committee Chair to review and edit Standard Operating Procedures.
- Created Standard Operating Procedures for
 - Governing Documents Committee
 - Executive Committee
- Reviewed, edited, accepted, and submitted recommendations to the Executive Committee for the following governing documents:
 - Constitution & By-Laws
 - Policy
 - Tribute & Announcement
 - Standardized the travel reimbursement form
 - Revised the Travel Reimbursement Policy

- President
 - Secretary
 - Treasurer
 - Resolution
 - Training & Succession Planning
 - Election (formerly Nominating)
- All remaining Standard Operating Procedures were reviewed by the Governing Documents Committee for uniformity, however, not revised at the Position or Committee Chairs' recommendations. The following Committees were edited for uniformity in names and to add the Executive Committee approved language stating: *"The Chair may be designated as a full member of the Governing Documents Committee at the Discretion of the President."*:
 - Auditing Committee
 - Internet Communications Committee
 - Legislative Committee
 - Membership Committee
 - Networking Sessions Committee
 - Program Committee
 - Time & Place Committee
- Notable changes and achievements include:
 - The President will have full online access to all bank accounts and shall review the activity no less than monthly.
 - Defined prerequisites for the elected officer positions.
 - Standard Operating Procedure revisions will become effective on the first day of the following conference year unless otherwise stated in the Standard Operating Procedures.
 - All governing documents will include a revision date.
 - Committee chairs may be designated as a full member of the Governing Documents Committee at the discretion of the President.
 - Constitution & By-Laws and officer voting will be completed electronically beginning after the July 2015 Annual Conference.
 - Constitution & By-Laws voting has been better defined to include all Designated Members.
 - Coordinated with the Internet and Communications Committee, the Standard Operating Procedures banner page on the website has been redesigned.
 - Attendance certificates for Annual Conference attendees will be prepared and distributed by the Resolution Committee, as requested.
 - Executive Committee roles, responsibilities, and processes have been documented, including naming a quorum to be present as a requirement for passing any issue.
- In the final days of the Standard Operating Reviews prior to Annual Conference, comments from members have created the following observations and recommendations for the incoming Governing Documents Committee:

- Address the responsibilities of the 218 Council members either in an existing or creating a specific Standard Operating Procedure allowing for input from members prior to quarterly meetings and a summary of quarterly meetings using any or all of the available resources (Executive Committee, Regional Vice Presidents, Forum, GoogleGroups, SurveyMonkey).
- Time & Place Committee
 - Address the contract language regarding CONUS rate changes from the effective date of the contract to the opening date for attendee registration.
 - Consider a tiered cancellation liquidation schedule.
- Define the voting process for each Committee excluding the Executive Committee
 - Is a majority of members present required to conduct business including/excluding voting?
 - Is a majority vote of the full committee's membership or a majority vote of committee members in attendance required to pass a vote?
- Define the minimum number of members for all Committees. For example, all Committees must have a minimum of three members including the Chair.

To Angie, Madison, Michele, Rick, Shirley, and T.J. – my thanks and appreciation for your hard work and contributions as a member of this Committee. I know how much time this Committee has demanded. Your ideas, understanding, support, thoughtful disagreements, and patience have made this a successful year. The challenges and successes have given me a valuable understanding of who we are individually and collectively. For that and more, thank you.

Respectfully Submitted on Behalf of the Governing Documents Committee,



Governing Documents Committee Chair, Idaho



**65th Annual Conference
Seattle, Washington
July 26-29, 2015**

Elections Committee

Chair

Kevin Mack, New York

Committee Members

Jennifer Berrier, Pennsylvania

Michele Briggs, Arizona

Angie Dowdy, Louisiana

Barbara Taylor, Mississippi



65th Annual Conference Seattle, Washington July 26-29, 2015

July 26, 2015

Program Committee

Chair

Maryann Motza, PhD, Colorado

Committee Members

Meghann Spring, Montana

Dean Conder, Colorado

Beth Dillon, Missouri

Angie Dowdy, Louisiana

Mary Griffin, Tennessee

Danielle Huffine, Iowa

Melanie Piccin, Washington

T.J. Reardon, Maryland

James Sawyer, Texas

Kim Smith, Washington

W. Grant Wright, New Mexico

The purpose of the NCSSSA Program Committee is to: plan, organize, direct, and manage the Annual Conference.

The Program Committee began by having an organizational conference call on September 9, 2014. A regular, monthly conference call schedule was established. At the beginning of the September call the existing Program Committee's section of the NCSSSA Standard Operating Procedures (SOP) Manual was reviewed and discussed so everyone had a clear understanding of the Committee's responsibilities. Also during that first conference call it was decided that the most efficient way to approach Committee responsibilities was to divide the workload and assignments among all Committee members by forming subcommittees that would conduct conference calls and/or exchange emails to accomplish assigned tasks between the full Program Committee conference calls. An agenda was distributed prior to each meeting and summary notes, including action items, were provided after each conference call. Between conference calls numerous email exchanges occurred to ensure issues were addressed as quickly as possible, if action was needed before the next regularly scheduled conference call.

During the course of the program year, the Committee acted both as the “Committee of the Whole” and also established several subcommittees to facilitate completion of all tasks, as follows:¹

Committee of the Whole:

- Reviewed, amended as deemed necessary and appropriate, and approved subcommittee recommendations.
- The Program Committee reviewed and discussed the NCSSSA Name Change Ad Hoc Committee’s request for feedback. The Executive Committee voted to postpone any action on the Name Change until it can be discussed by the full NCSSSA membership at the Annual Conference in Seattle in July 2015. The Program Committee added this topic to the Annual Conference agenda.
- Reviewed and discussed recommended changes to the Program Committee Standard Operating Procedures (SOP). Committee members identified some changes that the majority of the committee recommended be considered by the Governing Documents and Executive Committees. No changes to the current SOP are recommended until after they are discussed during the 2015 Annual Conference because the majority of the changes relate to proposing that the name of the “Annual Conference” be changed to “Annual Convention” to avoid confusion with the organization’s name. Those recommendations will be discussed when the Name Change Ad Hoc Committee provides its report and the NCSSSA membership discusses how to proceed further with a possible name change for the organization.
- Served as a “beta-test” for the NCSSSA Forum. NCSSSA FORUM LINK: <http://www.ncsssa.org/index.php>. The Program Committee found the Forum to be a valuable tool not only for the current program year, but also as a way to preserve ideas for future annual conferences as well as an excellent way to store documents that can be adapted by other Program Committees as they plan future conferences.
- Received information from Susie Dahl, NAPPA Executive Director, on how NAPPA manages and operates.
- Various organizational documents were used by the Committee during the course of the conference year to ensure all necessary and appropriate actions were taken in a timely manner. The Seattle Annual Conference Planning Sheet became the principal tool to plan, monitor, and confirm arrangements.

¹ Details on the Program Committee processes and decisions are available in the archives on the NCSSSA forum: <http://www.ncsssa.org/index.php> .

- Drafted and evaluated a survey to solicit suggestions for the 2015 Program. Committee members took a prospective look, i.e., “if NCSSSA was just established how would we want to set up our Annual Conference? What do we want to accomplish?” As part of that process, three of NCSSSA’s committees (Program, Networking Sessions, and Training & Succession Planning) developed a joint survey that was distributed in August 2014 to those who attended the New Orleans Annual Conference. The final results of that survey are available at: <https://www.surveymonkey.com/results/SM-5G8D9LCJ/> . Information obtained from that survey was instrumental to development of the proposed program (see the Program Content Subcommittee summary, below, for further information).
- In addition, to ensure any last-minute revisions and adjustments to the program were coordinated among all presenters, Maryann Motza, as the Program Committee Chair handled all final arrangements with the speakers and moderators. Adjustments to the program were necessary for various reasons. The final “block schedule” for the Seattle Annual Conference and other materials that were distributed to speakers and moderators are included in the archive folders on the NCSSSA Forum.
- Conference evaluation survey for the Seattle conference. Lead: Maryann Motza. The survey that was created and approved for use by the full Program Committee is available at: <https://www.surveymonkey.com/r/D2FZBDK> and the results of that survey are available at: <https://www.surveymonkey.com/results/SM-F3Y9Z8CJ/> .

Subcommittees:

Program Content Subcommittee

The Program Content Subcommittee recommended the following topics (numbered for ease of reference, not to indicate relative importance):

1. Public Pension Plan theme including what can be a pension plan and how is it taxed. It would include Hybrid Plans and Drop Plans-Rob Choi, an IRS field person, was suggested as a presenter. This can be combined with the topic discussed in number 2.
2. Overview of public pension and common terms and concepts. This can be combined with the topic discussed in number 1.
3. Social Media-Given by SSA and IRS discussing their use of videos/internet/teleconferencing/online SSA calculator. This would be about Federal outreach and referral information for the SSSAs.

4. State Outreach-Formalized Outreach by State Social Security Administrators using YouTube/traveling, tutorials on 218 and other presentations, etc. to educate before a local entity has a problem. A survey of State Administrators was conducted by the Program Committee to facilitate the panel's preparation for its presentation. The final results of that survey are at: <https://www.surveymonkey.com/results/SM-F6XXPCDY/>.
5. IRS Risk Areas identified through the 218 assessment project. This goes well with the State Outreach presentation to prevent problems before they occur.
6. Social Security Databases/Security of Electronic Information/Retention of Documents. How are documents provided to SSA and the IRS? How do you get copies of documents from the regional SSA office and the IRS? Thumb drives/jump drives are not secure. What are issues that you have with your IS/IT department in the transfer of information? Does your email have a limit on the size of a document attachment? What is kept in fire proof cabinets? What are destruction policies and practices? This could be done with someone from Baltimore, such as Marc Denos, in conjunction with a State Social Security Administrator to discuss the federal government's policy on document retention and how to implement it at the state level. Mary Griffin could coordinate with Marc Denos. This fits in well with the topic listed in number 7 below.
7. Old Age Survivor Insurance (OASI) filing systems (goes with the topic in 6) How do SSSA's keep their files? In paper/electronic? What type of database? Is it searchable/indexed? Are the documents easily retrieved? Does your state OASI law allow electronic filing? How do you get the documents scanned? What are the costs/equipment associated with a project like this? Was the scanning done as part of a Departmental scanning contract? How is the database maintained? We propose doing a survey of administrators to see how OASI documents are currently filed and whether they have a law in place, etc. to tailor the presentation to the audience. Meghann Butler-Spring offered to help formulate questions for a Survey Monkey questionnaire. This topic had a lot of interest and it was suggested that we take an idea from another organization and have tables set aside at lunch marked for discussion of this topic. This can be an effective way to network and exchange information. Mary Griffin offered to present the Tennessee electronic filing project and would work with Marc Denos and others on this topic as well. **NOTE:** A survey of records maintenance and retention practices was drafted by Program Committee members, but it was never distributed because this topic was dropped from the Seattle program. This topic will be reserved for consideration by future Program Committees.
8. Wage Reporting 101-what must employers file and how? Address Error Modifications, retroactive pay, and Rehired Annuitants when an entity paid and should not have as well as when they did not pay and should have done so. Many State Social Security Administrators need to understand how this

process works, even though State Administrators no longer process the documents. This would be a joint IRS/SSA presentation.

9. Police Officers/Firefighters/employees/EMTs. Some of these people were hired prior to 1986 as are other employees in state and local governments and this topic would address the options for employees who have not paid into Medicare. Could they draw on a spouse? Prior employment? Apply for insurance through the Exchanges? State Administrators need referral options for these employees. **NOTE:** Police Officers were added to the original topic suggested by the Subcommittee, based on a discussion of the survey results by the full Committee.
10. Wrap up: Hot Topics in Legislation. The subcommittee members indicated they thought it is important to have a legislative update every year and would like Maryann Motza, as Chair of the Legislative Committee, to be the moderator and to invite Susan Bussman from the Social Security Administration headquarters to speak. Time needs to be built in for discussion about concerns.
11. Because Mark Brown will be retiring soon, the subcommittee members wanted to ensure he would speak in Seattle. Subcommittee members would like to offer him an hour and a half to present on the topic of his choice and puppets **MUST** be included!
12. Kirk Jockell is also retiring soon. It was proposed that he could talk about the steps at the Regional Social Security Office in processing a Section 218 Modification from receipt in the mail from a State Administrator through the Office of General Counsel to final approval by the Regional Commissioner. Among the items to be addressed, for example, would be verifying FICA deductions under the stated EIN, etc.
13. Consolidations, annexations, dissolutions, particularly regarding school districts/local governments.
14. K through 12 school districts; this would go along with number 13. Some school consolidations, become "K-12 Schools," others are allowed to change their name. Montana has experienced these issues.

Additionally, the Subcommittee discussed some of the comments from the surveys:

- It is good to have some review of information and some new presentations with Monday and Tuesday being the true training days and Sunday and Wednesday being business sessions.
- It is important to have a variety of speakers from a variety of agencies.
- Perhaps have some designated tables for "discussion" during our lunch caucuses.

- Have at least one panel.
 - Have time to discuss concerns coming up. This can be paired with the Legislative Hot Topics session.
 - Encourage handouts for all presentations.
 - Consider the amount of time needed to fully cover a topic. Also time for discussion.
 - Keep the speakers running on time.
 - Consider starting with more basic topics and working towards more difficult ones.
 - Continue to cover the role of the State Administrators for new attendees and others that want to attend in the Sunday afternoon session and use the session to energize administrators about why their role is important and how to communicate the importance of the role to management/the powers that be.
- **Registration Fee/Meals, breaks, menus/Registration Gifts.** Beth Dillon (Subcommittee Chair) with Angie Dowdy, Danielle Huffine, Melanie Piccin, Kim Smith, and Grant Wright. **NOTE:** This subcommittee worked closely with the Social Events Subcommittee as well as with the Networking Sessions Committee. Recommendations of this subcommittee which were approved by the full Program Committee are included as part of the archived materials on the NCSSSA Forum.
 - **Social Events.** Angie Dowdy (Subcommittee Chair) with Beth Dillon, Melanie Piccin, and Kim Smith. **NOTE:** This subcommittee worked closely with the Registration Fee/Meals, breaks, menus/Registration Gifts Subcommittee as well as with the Networking Sessions Committee. The Networking Committee decided not to host a Monday Night Event in Seattle.
 - **Theme and Logo.** Kim Smith (Subcommittee Chair) with Melanie Piccin, and Meghann Butler. The final theme and logo that were adopted for the Seattle Annual Conference are on the NCSSSA Forum in the archive folder.
 - **Preparation of the draft conference call and “Save the Date” announcements.** Meghann Butler-Spring (Subcommittee Chair), Danielle Huffine, and Maryann Motza. See the archives of the NCSSSA Forum for the final conference call and save the date announcements.
 - **Program Booklet.** Angie Dowdy (Subcommittee Chair) with Maryann Motza.
 - **Audio-visual needs** (based on contract terms). Angie Dowdy (Subcommittee Chair) with Beth Dillon.
 - **Points to discuss during Regional Conference Break-out Sessions.** James Sawyer (Subcommittee Chair) with Mary Griffin. The agenda for the break-out sessions on Sunday, July 26th is included in the archives on the NCSSSA Forum.

- **Moderator Coordination**. Mary Griffin (Subcommittee Chair) with James Sawyer.
- **Monitor hotel and conference registrations**, compare/contrast the two lists, and follow-up with appropriate Regional Vice President to have them encourage additional participation from their regions as well as to remind anyone who has registered for either the hotel or conference, but not both, to complete the appropriate registration that is missing. Beth Dillon (Subcommittee Chair) with James Sawyer.
- **Finance Subcommittee** (to compare & contrast proposed expenses against past conferences). Danielle Huffine (Subcommittee Chair) with Kim Smith.
- **Plan a “special” event or tribute for Mark Brown**. Melanie Piccin (Subcommittee Chair) with Meghann Butler-Spring and TJ Reardon.

Topics Identified for Future Programs

The following topics were not used for the Seattle program, but are recommended for consideration as part of future programs:

- Old Age Survivor Insurance (OASI) filing systems. How do State Administrators keep their files?
- Social Security Databases/Security of Electronic Information/Retention of Documents.
- Social Media from the Social Security Administration’s perspective. (This topic will be addressed during the Seattle conference from the IRS’s perspective.)

Details on each of those topics are provided in the attachment to this report.

As chairperson of the Program Committee, I want to personally thank the other members (listed on page one of this report) for their contributions and continued support of the efforts of the Committee. Their work and dedication to the committee was invaluable to ensuring that the NCSSEA Annual Conference in Seattle contains timely information that is valuable to state and federal officials alike.

Respectfully Submitted,



Maryann Motza, PhD, Chair
Program Committee

Attachment

The following topics were originally considered for the Seattle Annual Conference, but were not used for various reasons. The numbers tie back to the original list of topics that were compiled by the 2014-2015 NCSSTA Program Committee.

3. Social Media-Given by SSA and IRS discussing their use of videos/internet/teleconferencing/online SSA calculator. This would be about Federal outreach and referral information for the SSSAs.

6. Social Security Databases/Security of Electronic Information/Retention of Documents. How are documents provided to SSA and the IRS? How do you get copies of documents from the regional SSA office and the IRS? Thumb drives/jump drives are not secure. What are issues that you have with your IS/IT department in the transfer of information? Does your email have a limit on the size of a document attachment? What is kept in fire proof cabinets? What are destruction policies and practices?

This could be done with someone from Baltimore (Denos?) in conjunction with an SSSA to discuss the Feds policy on document retention and how to implement it at the state level. Mary G. would coordinate with Denos on this. See number 7 below.

(Number 6 on original list)

7. OASI filing systems (goes with the topic in 6). How do SSSA's keep their files? In paper/electronic? What type of database? Is it searchable/indexed? Are the documents easily retrieved? Does your state OASI law allow electronic filing? How do you get the documents scanned? What are the costs/equipment associated with a project like this? Was the scanning done as part of a Departmental scanning contract? How is the database maintained? We propose doing a survey of administrators to see how OASI documents are currently filed and whether they have a law in place, etc. to tailor the presentation to the audience. Meghann offered to help formulate questions for a Survey Monkey. This topic had a lot of interest and it was suggested that we take an idea from another organization and have tables set aside at lunch marked for discussion of this topic. This can be an effective way to network and exchange information. Mary G. has offered to present the Tennessee electronic filing project and would work with Marc Denos/others on number 6 as well.

(Number 7 on original list)

NOTE: References to Marc Denos are no longer valid (as of August 2015). He is no longer the Team Leader for state and local. As of August 31, 2015, his successor has yet to be named.



**65th Annual Conference
Seattle, Washington
July 26-29, 2015**

Date: July 26, 2015
Resolution Committee

Chair

Amanda Schmitgen, South Dakota

Committee Members

Tammy Taylor, Kentucky

Barry Faison, Virginia

Barbara Taylor, Missouri

During the conference year, the Resolution Committee revised our SOP and the revised SOP was reviewed and approved by the Governing Documents Committee and the Executive Committee. The Chairperson purchased paper for printing resolutions and \$8.45 was approved for reimbursement by the President and Treasurer.

The Resolution Committee submits the following **sixty-five** Resolutions to the 65th Annual Conference of the NCSSSA:

NCSSSA

2015-01	Vandee DeVore
2015-02	Dr. Maryann Motza
2015-03	James Sawyer
2015-04	Tammy Taylor
2015-05	Richard Beckstead
2015-06	Stephanie Fecteau
2015-07	T.J. Reardon
2015-08	Barbara Taylor
2015-09	Nancy Burklow
2015-10	Karen Lawrence
2015-11	Amanda Schmitgen
2015-12	Pamella Johnson
2015-13	Rita Foltman
2015-14	Katherine Gouyton
2015-15	Meghann Butler Spring
2015-16	Madison Davis
2015-17	Barry Faison
2015-18	Melanie Piccin

2015-19 Michele Briggs
2015-20 Angie Dowdy
2015-21 Shirley Sessoms
2015-22 Paul Brugger
2015-23 Joyce Morgan
2015-24 Kim Smith
2015-25 Dr. Kathleen Baxter
2015-26 Dean Conder
2015-27 Mary Griffin
2015-28 Omar Masood
2015-29 Kevin Mack
2015-30 Jennifer Berrier
2015-31 Beth Dillon
2015-32 Danielle Huffine
2015-33 Grant Wright
2015-34 Ron Carlson
2015-36 Mark Shellhammer
2015-56* Mark Shellhammer
2015-57* Richard Beckstead

SSA

2015-38 Mark Brown
2015-39 Fred Sanchez
2015-40 Kirk Larson
2015-42 John Fox
2015-43 Susan Bussman
2015-44 Benjamin Prevas
2015-47 Natalie Jemison
2015-48 Kirk Jockell
2015-49 Amy Bland
2015-50 Shalyn Timmons
2015-52 Alan Heim
2015-58 Patricia Lightholder

IRS

2015-37 Michael Spaid
2015-41 Dwayne Jacobs
2015-46 Paul Marmalejo
2015-53 Clark Fletcher

OTHER

2015-35 Velda Staley
2015-45 Anthony Rodas
2015-51 Nancy Pennington
2015-55* Nancy Pennington

2015-54* Glen Gainer
2015-59 The American Legion Renton Post 8
2015-60 Carlos Villa
2015-61 Stephanie Clarey
2015-62 Diana Jimenez
2015-63 Diane Witt
2015-65 DianaWaddell
2015-65 Josie Colado.

Certificates of Attendance Issued to

NCSSSA:

James Sayer
Ron Carlson
Kay Gouyton
J.W. Bryan
Chris McDermott

Respectfully Submitted this 26th Day of July,

Amanda Schmitgen, Chair
Resolution Committee

* Special resolutions requested for regional training sessions.



National Conference of State Social Security Administrators

**65th Annual Conference
Seattle, Washington
July 26-29, 2015**

Date: July 23, 2015

Time and Place Committee

Chair

Meghann Butler Spring, Montana

Committee Members

Beth Dillon, Missouri

Mary Griffin, Tennessee

Danielle Huffine, Iowa

T.J. Reardon, Maryland

Ron Carlson, Nebraska

Madison Davis, Arkansas

The purpose of the NCSSSA Time and Place (T & P) Committee is to: solicit bids, negotiate contract specifications, and recommend future host sites for the Annual Conference to the Executive Committee.

During the course of the 2014-2015 conference year, T & P Committee did just that. We initially had four states offer sites. Colorado removed their name, once they knew we had other states offering. Arkansas, West Virginia and Texas all sent information for conference location sites.

T & P Committee had organizational conference calls, beginning October 16, 2014. Conference calls/discussions were held as needed, as well as email editing and question/answers as needed.

Madison Davis removed Arkansas from the contention, thus Texas and West Virginia were analyzed on the January 15, 2015 conference call. Mr. James Sawyer (Texas SSSA) and Mr. Mark Shelhammer (West Virginia SSSA) were invited to sit in on the beginning of the call and discuss options each state offered. T & P Committee followed SOP rules (#5 and 6 specifically during this time). After much deliberation T & P proposed to Executive Committee to line up two states for conferences into 2018. Both offered great locations and atmosphere for the NCSSSA Conference. With permission granted, we have selected Charleston, WV, for the 2017 conference and moving to the southern part of the USA in 2018: Texas. Both Executive Committee and Time and Place felt comfortable with lining up these states, however, leaving to the discretion of the next T & P Committee to choose which city and negotiate the RFP, etc.

T & P Committee worked with Ms. Nancy Pennington from the West Virginia State Auditor's office. [We are very grateful and thankful for the help she provided in soliciting and gathering RFP's in Charleston.] We analyzed 4 sites, narrowing down to two locations. Upon further discussion and based on recommendations, Marriott Charleston was selected for our 2017 NCSSSA Conference location.

T & P Committee also requested to serve as a "beta-tester" for the NCSSSA Forum. As a whole, our committee felt this was a great way to upload history and pass along information to the next committee. (The past few years, we have had several states show interest in hosting the NCSSSA Conference.)

I wish to thank each person on Time & Place Committee, for their dedication and contribution towards the entire process, from deciding where to host to the finalization of the RFP.

Respectfully Submitted,



Meghann Butler Spring, Chair
Time and Place Committee

Time and Place Committee
Seattle, Washington
Saturday July 25, 2015



National Conference of State Social Security Administrators

65th Annual Conference
Seattle, Washington
July 26-29, 2015

Auditing Committee

Chair, Katherine Gouyton, AK
Committee Members
Meghann Butler, MT
Madison Davis, AR
Barry Faison VA
Melanie, Piccin, WA
James Sawyer, TX

The Auditing Committee met on July 27, 2015, to review the financial records of the National Conference of State Social Security Administrators. The Treasurer's record of receipts and disbursements were found to be accurate and complete. The Auditing Committee commends Rick Beckstead for his efforts that supported the Auditing Committee's review.

Findings: The committee sampled both expenditures and revenues. All appear to be within the scope of our review; and we thank Rick for all of his hard work and well organized binder.

Recommendations:

#1: The Treasurer has been using the same bank used by the prior treasurer and it was felt a review of additional firms, such as a government credit union might better benefit the organization.

#2: It was noted that charges from both the bank and the internet company used by the organization varied from month to month. While the differences from month to month were not material a more detailed note as to the variations billed would benefit future inquiries from the Auditing Committee.

Respectfully submitted,

Katherine Gouyton, Past Alaska SSSA
Auditing Committee Chair, NCSSSA



National Conference of State Social Security Administrators

**35th Annual Conference
Seattle, Washington
July 26-29, 2015**

July 29, 2015

Internet Communications Committee

Chair

Tammy Taylor, Kentucky

Committee Members

Ron Carlson, NE

Vandee DeVore, MO

Barry Faison, VA

T.J. Reardon, MD

Amanda Schmitgen, SD

Barbara Taylor, MS

The Conference Presentation page on the NCSSSA website was redesigned to provide a menu of the presentations. The updated format uses a drop down menu system. The drop down menu is categorized by year and includes the presentation name and the presenter name.

Several file sharing options were researched for sharing secure or sensitive information with the NCSSSA membership. The options that were researched and tested were a secure webpage, secure PDF files and a member's only Forum.

The secure webpage would require a password before opening the page. It included coding that would direct to the page if the correct password was entered. If the incorrect password was entered, the page contents would be encrypted. The chief complaints with this page were that the password had to be entered each time you were directed back to the page and there would just be one universal password for all users.

The secure PDF files would require a password to open the file. Access to the page would be granted to all users, but the PDF files could not be opened without the password. This resolved the issue with reentering the password when directed back to the page, but it would still use one universal password for the files.

The Forum is an internet-based system that has been designed as a tool to share secure information with members. It can also be a useful communication tool for Committee Chairs as a discussion board during a current Conference Year, as well as a

file sharing system between current and future Committee members. The forum allows users to create their own User ID and password which helps to maintain the security by not sharing a password.

After testing within the Committee, the Internet Committee presented all three options to the Executive Committee for review. It was decided to move forward with further testing of the Forum as this option not only serves the purpose of sharing secure documents with the membership, but it also addressed the concerns raised by the other options. A beta test was conducted with several members and committees using the forum for several months and then completing a survey for the usefulness of the site. The results were shared with the Executive Committee and they voted to move forward with using the NCSSEA Forum as the secure file sharing method. A registration notification was sent through the Google Group to notify members of the Forum and how to sign up.

The format in which the Standard Operating Procedures were presented on the website has been updated. Formerly, the SOP was a PDF file that included all SOPs in one document that was posted on the Forms and Publications page. This format has been replaced with a webpage that is dedicated to the SOPs with links to each individual SOP. A button was added to the side bar menu to access this page. A link to the page is also on the Forms and Publications page. All SOPs have been updated and are available for review on the website.

Roster changes for State Administrators and Social Security Regional contacts are current as of July 2015. All 2015 Conference Presentations will be added and Committee assignments will be updated as soon as they are made available.

Respectfully Submitted,


Tammy Taylor, Chair
Internet Communications Committee



65th Annual Conference Seattle, Washington July 26-29, 2015

July 29, 2015

Legislative Committee

Chair

Maryann Motza, PhD, Colorado

Committee Members

Kathleen Baxter, PhD, Alabama

Dean J. Conder, Colorado

Vandee DeVore, Missouri

Angie Dowdy, Louisiana

Mary Griffin, Tennessee

Omar Masood, Delaware

T.J. Reardon, Maryland

James Sawyer, Texas

The purpose of the NCSSSA Legislative Committee is to: monitor, maintain, assess, and disseminate proposed legislative, policy, and regulatory changes affecting Social Security and employment tax programs at the federal and state levels of government. Provide analyses and proposed responses to NCSSSA leadership and other appropriate officials.

The 2014-2015 Legislative Committee conducted an organizational conference call on September 10, 2014. The Committee was extremely active again this year, having accomplished the following:

1. Held multiple conference calls during the program year. During the first conference call it was again decided that the most efficient way to approach Committee responsibilities was to divide the workload and assignments among all Committee members. An agenda was distributed prior to each meeting and summary notes, including action items, were provided after each conference call. Between conference calls numerous email exchanges occurred to ensure issues were addressed as quickly as possible.
2. Continued networking/liaison relationship with twenty (20) organizations or policy-making bodies at the national level and added eight (8) new ones that have similar issues and concerns to NCSSSA (numbered for ease of reference, not to indicate relative importance.), i.e.:

1. Advisory Committee on Tax Exempt and Government Entities (ACT)
2. Association of Government Accountants (AGA)
3. BenefitsLink
4. Brookings Institution
5. Buck Consultants
6. Center for State and Local Government Excellence (SLGE)
7. Coalition to Preserve Retirement Security (CPRS)
8. Council of State Governments
9. Gabriel-Roeder-Smith Consulting
10. Governing
11. Government Finance Officers Association (GFOA)
12. KPMG – The Washington Report
13. National Association of Counties (NAC)
14. National Association of Public Pension Attorneys (NAPPA)
15. National Association of State Retirement Administrators (NASRA)
16. National Conference of Public Employees Retirement Systems (NCPERS)
17. National Conference of State Legislatures (NCSL)
18. National Council on Teacher Retirement Systems (NCTRS)
19. National Governor’s Conference (NGA)
20. National League of Cities (NLC)
21. Pension Research Council
22. Public Pension Network (PPN)
23. Segal Consulting
24. Section 218 Council
25. State Auditors, Comptrollers and Treasurers (SACT)
26. The Urban Institute
27. U.S. House Ways and Means Committee
28. U.S. Senate Finance Committee

Between conference calls, informational emails and reports from the above organizations were shared with members of the Legislative Committee and the NCSSSA leadership to ensure they were apprised of significant national-level issues and developments.

3. Follow-up assignments from 2013-2014. The Legislative Committee had a number of follow-up assignments that carried over into 2014-2015. Those items were:
 - A. A letter was drafted to the Council of State Governments recommending that they work with NCSSSA in the future, especially when issues associated with state and local governments’ FICA taxes, public pension system requirements, and Social Security/Medicare coverage and benefit topics arise. See Appendix A for the final letter.

- B. Center for Retirement Research (CRR) at Boston College published a study on integration of Social Security into the public sector. The study was “commissioned” by the U.S. Social Security Administration through a grant to CRR. The report, entitled “The Impact of Mandatory Coverage on State and Local Budgets” was issued in May 2014 and is available at: <http://crr.bc.edu/working-papers/the-impact-of-mandatory-coverage-on-state-and-local-budgets/>. During 2013-2014, Ms. DeVore gave Dr. Motza a “heads up” that such a report was being prepared by CRR and a footnote in the final report acknowledged NCSSSA’s historical opposition to universal (or “mandatory”) Social Security coverage for state and local governmental employees. That occurred because Dr. Motza contacted Mr. Jean-Pierre (JP) Aubry, Deputy Director of the Center for Retirement Research at Boston College (CRR), and explained NCSSSA’s unique role and expertise in state and local FICA coverage and public pension plan matters. She also explained that CRR’s reports on state and local Social Security, Medicare, and public pension plans could benefit from NCSSSA’s involvement early in the process of designing and drafting their studies.

During the current program year, the Legislative Committee began drafting comments and concerns about the contents of the final report which were to be sent to CRR with a copy being sent to the U.S. Social Security Administration’s Acting Commissioner (Carolyn Colvin). Dr. Motza contacted Tom Lussier of the Coalition to find out what they planned to do about updating the Segal reports and/or other follow-up to the CRR report to provide evidence that the conclusions in the CRR report are fallacious. The Coalition prepared a new informational brochure entitled, Retirement Insecurity: The Unintended Consequences of Mandatory Social Security Coverage.” A PDF copy of that brochure is included as Appendix B of this report. No other actions, however, were taken by the Coalition.

During the 2014- 2015 program year, Dr. Motza was contacted about a separate matter by Mr. Aubry. He asked for assistance in researching referendum election activities in the states. He had become aware of NCSSSA due to Dr. Motza contacting him prior to the release of the May 2014 report. Because of the latest contact that Mr. Aubry initiated and the chance that CRR could view NCSSSA as a resource for state and local FICA/public pension plan research in the future, committee members decided to put the above mentioned response letter “on hold.” The Legislative Committee is currently working with Mr. Aubry on preparing a survey of State Social Security Administrators. This will be a carry-over project for the new Legislative Committee to address during 2015-2016.

- C. Completed compilation of comments and suggested edits for the latest edition of the *Federal-State Reference Guide* (IRS Pub. 963) and submitted the suggestion prior to the end of August 2014. **NOTE:** It was agreed by both

President Foltman and President DeVore that the 2013-2014 Legislative Committee members would complete this project. This was necessary to ensure NCSSSA could meet the Internal Revenue Service's (IRS) deadlines for providing feedback on suggested edits and comments. See Appendix C for the recommendations that were submitted to the IRS and their response.

Dr. Motza recently contacted Ms. Rhonda Kingsley of the IRS who assumed the responsibilities for updating Pub. 963 when Mr. Rouleau retired in 2015, but she has not received a response from Ms. Kingsley as of the date of this report. Dr. Motza will follow-up to ensure NCSSSA's input is provided for any updates to the *Guide* that are planned for November 2015.

- D. Reviewed and discussed implications of the University of Colorado at Colorado Springs report entitled "An Analysis of SMART Options: Reinstatement of the Section 218 Option", dated February 2014. See Appendix D for the report's table of contents and executive summary. Follow-up on this with both El Paso County officials and Mr. Lussier of the Coalition to Preserve Retirement Security will be a carry-over project for the new Legislative Committee to address during 2015-2016.
4. Monitored legislative and regulatory activities and publications of interest to NCSSSA members, including:
 - A. Universal Social Security issues. See item # 3.B. in the follow-up/carry-over projects from last program year.
 - B. Windfall Elimination Provision (WEP) Proposal introduced by Representatives Brady and Neal (see Appendix E for further information). Ms. Susan Bussman, Social Security Administration's Legislative and Regulatory Relations Director in Baltimore, provided the SSA's Chief Actuary's website link for his office's analysis of the bill: <http://www.socialsecurity.gov/OACT/solvency/index.html>. H.R. 5697 is the first bill on this list. The analysis includes a thorough description of what the bill would do, as well as an estimate of cost/savings. The bill was reintroduced (H.B. 711) when the new session of Congress convened in January 2015.
 - C. Medicare Opt-in. H.R. 2618 was introduced in the House of Representatives in July 2013. No further action was taken on this by Congress during the 2014-2015 NCSSSA program year.
 - D. Latest Annual Reports of the Social Security and Medicare Trustees (2015). Link to reports: <http://www.ssa.gov/OACT/TRSUM/index.html>.

- E. Senator Hatch’s proposal (Secure Annuities for Employee (SAFE) Retirement Act of 2013). See Appendix F for information on that proposal.
 - F. On June 9, 2015, Mr. TJ Reardon attended a program in Washington, D.C. sponsored by the Center for State and Local Government Excellence entitled, “Retirement Security Summit: The Evolving Social Contract” See Appendix G for the announcement of the program as well as Mr. Reardon’s report.
 - G. Congressional Research Service, August 28, 2014, report entitled “Social Security: What Would Happen If the Trust Funds Ran Out?” See <https://www.fas.org/sgp/crs/misc/RL33514.pdf>.
 - H. Congressional Budget Office, August 2014 report entitled “An Update to the Budget and Economic Outlook: 2014 to 2024.” See https://www.cbo.gov/sites/default/files/113th-congress-2013-2014/reports/45653-OutlookUpdate_2014_Aug.pdf.
 - I. Congressional Budget Office, June 2014 report entitled “The 2014 Long-Term Budget Outlook.” See https://www.cbo.gov/sites/default/files/113th-congress-2013-2014/reports/45471-Long-TermBudgetOutlook_7-29.pdf.
 - J. Reviewed the Office of Chief Counsel Internal Revenue Service Memorandum # 201519027 Released May 8, 2015 related to Wholly-Owned Instrumentality Status of “X” Charter School. While the information contained in that memorandum cannot be used or cited as precedent, it provides some guidance that can be used in other states as long as their laws are applied to the tests outlined in the memorandum. See Appendix H for a copy of that memorandum.
5. Continued active involvement in the Public Pension Network, which began during 2007-2008, after Ms. Barrie Tabin-Berger, Assistant Director, Federal Liaison Center, GFOA, sponsored NCSSSA’s membership. 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), the National Council on Teacher Retirement (NCTR), National Association of Government Defined Contribution Administrators (NAGDCA), and the National Conference of State Legislatures (NCSL). Involvement in the Public Pension Network has proven to be extremely valuable to NCSSSA in two major ways:
- 1. Ensures that NCSSSA is apprised immediately of any Federal-level developments (Presidential, Congressional, or regulatory) that impact any

aspects of NCSSSA's areas of interest, e.g., Social Security, Medicare, employment taxes, and public pension system requirement oversight.

2. Provides high-profile exposure for NCSSSA on significant national issues when NCSSSA signs on to letters expressing concern or support for proposed actions at the Federal level.

NCSSSA was a signatory on two letters sent by the PPN this year:

- A. U.S. Senate Committee on Finance Tax Reform Working Group on Saving and Investment. The Saving and Investment Working Group had jurisdiction over the tax treatment of capital gains and dividends, financial products, defined benefit pension plans, and private retirement savings accounts. The report is attached to this report and is also available at: <file:///C:/Users/qcnu04/Downloads/The%20Savings%20&%20Investment%20Bipartisan%20Tax%20Working%20Group%20Report.pdf>. See Appendix I for a copy of the PPN letter, dated April 15, 2015, the final Working Group Report (dated July 2015) and miscellaneous email communications distributed by the PPN during 2014-2015.
- B. Letter dated May 11, 2015, providing comments on IRS Notice 2015-07, which sets forth specific rules and relief to certain participants in Internal Revenue Code §414(d) governmental plans. See Appendix J for a copy of the Notice, the joint letter, and a separate letter, dated May 6, 2015, which was sent to the IRS by NCSSSA President DeVore.

NCSSSA's Legislative Committee will continue to participate in PPN activities and provide the NCSSSA President with any draft letters so he/she can decide if NCSSSA should be a signatory.

6. Drafted legislative briefing materials for the NCSSSA leadership team (President Vandee DeVore, First Vice-President Maryann Motza, and Vice-President Designate James Sawyer). The Issues Statement was used by the leadership team during the meetings with U.S. House Ways and Means Committee staff and with representatives from several of the NCSSSA Public Pension Network partners, while participating in the leadership meetings held in Washington, D.C. and Baltimore in March 2015 (see Appendix K for the final that was used during the meetings and for the Action Items that resulted from the meetings).
7. At the request of the newly-formed Governing Documents Committee, reviewed the current section of the NCSSSA Standard Operating Procedure (SOP) that applies to the Legislative Committee. Committee members had reviewed the SOP and recommended, and received approval, to update its section of the SOP during 2012-2013, so no additional changes were recommended this program year.

8. Provided Legislative Committee feedback to questions posed by the Ad Hoc Name Change Committee. See Appendix L for that series of email exchanges.
9. Conducted several miscellaneous activities on behalf of NCSSSA during 2014-2015:
 - A. All Legislative Committee members reviewed the current IRS compliance self-assessment form (Form 14581: <http://www.irs.gov/pub/irs-pdf/f14581.pdf>) and suggest areas for improvement. Suggestions were provided to President Vandee DeVore and Mr. Dean Conder, both of whom are serving on the Advisory Committee for Tax Exempt and Government Entities (ACT) and were reviewing that and other education and outreach tools currently used by the IRS. The comments were provided by individual committee members, so there is no single document that captured recommendations and comments from the Legislative Committee. The Legislative Committee solicited information from other NCSSSA members on behalf of the ACT Committee. The documents announcing that the request are contained in Appendix M.
 - B. Asked the Leadership Team, (Vandee DeVore, President; Maryann Motza, First Vice President; and James Sawyer, Vice President Designate) to obtain the current list of Section 218 Compliance Risks that have been identified by the IRS as part of their compliance efforts. The latest available list was provided in March 2014. **NOTE:** This topic was put on the 2015 Annual Conference by the Program Committee, so an update on the risk areas will be available during the conference.
 - C. Conducted an email discussion of the Request for Comments from the Actuarial Standards Board. No action was taken by NCSSSA on preparing and submitting any comments to the ASB, per agreements of Committee members via email exchanges during October 2014.
 - D. Reviewed Ernst and Young's report entitled "2015 Legislative Outlook" that was issued on January 13, 2015 and is available at: file:///C:/Users/qcnu04/Downloads/Legislative%20Update_WCEY-2015Outlook.pdf .
 - E. Reviewed regular issues of the "Washington Update" that is prepared by Williams & Jensen, PLLC, for the National Conference on Public Employee Retirement Systems (NCPERS).
 - F. Dr. Motza participated in a demonstration and feedback session on September 23, 2014, on the upgraded Public Plans Database that is co-sponsored by the Center for State and Local Government Excellence, the Center for Retirement Research at Boston College, and the National Association of State Retirement Administrators (NASRA). The webinar was to "beta test" revisions to the Public Plans Database that is currently maintained by the CRR,

with sponsorship of SLGE. The revised database now provides expanded user-friendly tools. The revised and updated database is available at: <http://crr.bc.edu/data/public-plans-database/>.

- G. Discussed the latest status Government Accountability Office (GAO) 2010 Report entitled "Social Security Administration: Management Oversight Needed to Ensure Accurate Treatment of State and Local Government Employees" GAO-10-938: Published: Sep 29, 2010. Publicly Released: Oct 4, 2010. GAO reports that all recommendations have been accomplished by the Social Security Administration and Internal Revenue Service so no further follow-up is planned by the GAO at this time. The final Report and status of recommendations are available at: <http://www.gao.gov/products/GAO-10-938>.
- H. Reviewed the announcement by the Internal Revenue Service's Tax Exempt and Government Entities Division Announcement 2014-34 Realignment of Technical Work between the Tax Exempt and Government Entities Division and Office of Association Chief Counsel (Tax Exempt and Government Entities). See Appendix N for a copy of that announcement.
- I. Reviewed the Ogletree-Deakins summary report, dated May 8, 2015, entitled "FICA Tax Student Exemption Resolution: Fifth Circuit Decision About Refunds of FICA Taxes Paid by Medical Residents Stands" and decision issued that was issued July 16, 2014, by the U.S. Court of Appeals' Fifth Circuit in the University of Texas System v. U.S. case. See Appendix O for both the report and the Fifth Circuit's decision.

As chairperson of the Legislative Committee, I want to personally thank the other members (listed on page one of this report) for their contributions and continued support of the efforts of the Committee. Their work and dedication to the Committee was invaluable to ensuring NCSSSA members are kept informed in a timely manner of critical national level regulatory and legislative developments that are of importance to State Administrators and public employers/employees throughout the country and that NCSSSA's voice is heard at the national level on important policy issues.

Respectfully Submitted,



Maryann Motza, PhD, Chair Program Committee

Click [here](#) to view Appendix A thru Appendix O



**65th Annual Conference
Seattle, Washington
July 26-29, 2015**

July 29, 2015

Membership Committee

James Sawyer, MPA, CEBS, Chair
State of Texas

Committee Members

Amanda Schmitgen -SD, Barbara Taylor – MS, Pamella Johnson – OR, TJ Riordan – MD, Stephanie Fectau – ME, Karen Lawrence – OK, and Nancy Burklow – IL

The Chair of the Membership Committee solicited comments from the members regarding the mission and purpose of the Committee.

The Committee's purpose statement was revised in June 2014 to read:

Evaluate the merits of broadening participation in the NCSSSA organization. Develop on going strategies to maximize the organization's participation and networking via other national organizations and other means. Encourage states to attend regional training sessions sponsored by NCSSSA. If appointed by the President, the Vice President Designate will serve as the Membership Committee Chair. Regional Vice Presidents, and others appointed by the President, make up the committee members.

The Membership Committee held several conference calls during program year 2014-2015 and accomplished the following:

1. Reviewed and discussed suggested edits to the following sections of the SOP Manual: Membership Committee, Vice President Designate, and Regional Vice President.
2. During the calls the committee discussed various topics of importance to NCSSSA including the following:
 - a. How to encourage State Administrator's participation in NCSSSA.
 - b. Plans for the Sunday June 26 Regional Caucus meetings
 - c. Identify topics for future Committee conference calls and/or actions that Regional Vice Presidents should take which include:
 - Discussing non-participating states

- Discuss latest SOP edits
 - Having Regional Vice Presidents call states in their region to directly encourage participation in regional conference calls if/when scheduled
 - Having Regional Vice Presidents call states in their region to directly encourage participation in the NCSSSA Annual Conference in Bozeman, MT in September 2016
3. During the conference year, the Membership Committee and the Regional VP were responsible for ensuring communication between the Executive Committee and the states within their respective regions. They were also asked to bring up issues, concerns and questions from states in their regions to the Executive Committee.
 4. Membership Committee members participated in or facilitated communications to the member states concerning the work of the Executive Committee and various ad hoc committees established by the President.

As Committee Chair, I would like to personally thank the members of the Committee for their contributions and their continued support of the committee. Their work and dedication to the Membership Committee were invaluable to ensuring NCSSSA members are kept apprised of NCSSSA activities and decisions reached by the Executive Committee.

Submitted by James Sawyer, MPA, CEBS, Chair, Membership Committee – 07/29/15



A Venti Cup of Section
218 Knowledge

**65th Annual Conference
Seattle, Washington
July 26-29, 2015**

Networking Sessions Committee

Chair

Angie Dowdy, Louisiana

Committee Members

Rick Beckstead, Utah
Michele Briggs, Arizona
Barry Faison, Virginia
Rita Foltman, Idaho
Kay Gouyton, Alaska
Pamella Johnson, Oregon
Joyce Morgan, Florida
Kim Smith, Washington
Barbara Taylor, Mississippi



National Conference of State Social Security Administrators

**65th Annual Conference
Seattle, Washington
July 26-29, 2015**

July 26, 2015

Training and Succession Planning Committee

Dean J. Conder, CO Chair

Members: Vandee DeVore, MO

Angie Dowdy, LA

Maryann Motza, CO

Melanie Piccin, WA

T.J. Reardon, MD

James Sawyer, TX

Rita Foltman, ID

The purpose of the Training and Succession Planning Committee (Committee) is to assess the needs for membership training and provide training to state and federal officials in the area of state and local government FICA compliance. Educate state administrators and other officials on the responsibilities of the state administrator and provide advice on succession planning.

Three successful Regional Training sessions were held this year – one in Kansas City, MO (February 3rd and 4th); Salt Lake City, Utah (March 19th and 20th); and Charleston, West Virginia (April 21st and 22nd). These trainings focused on fundamentals of state and local FICA coverage. Surveys of the participants for each event can be seen at:

https://www.surveymonkey.com/analyze/kO4UnHXe7Gc_2BMhyBVc_2FL4iDe3jiKhR_2BjccIzjhlgvww_3D

In our continuing effort to expand our training reach and training methods, a Tele-training was held for NCSSSA members on April 8, 2015. The topic was IRS Form 14581, Self-Assessment Compliance Checklist. The training focused on how to use the form for outreach to state administrator's local government customers. The presentation was recorded using a teleconference service and the recording is available on the NCSSSA website.

The Committee reviewed and revised its Standard Operating Procedure (SOP). The revised SOP was given clearance by the Governing Document Committee and was approved by the NCSSSA Executive Committee.

Other committee work included participation in Program Committee calls for conference topic development and preparation for the annual conference.

Respectfully Submitted,

Dean J. Conder, Chair
NCSSSA Training and Succession Planning Committee



A Venti Cup of Section
218 Knowledge

National Conference of State Social Security Administrators

65th Annual Conference
Seattle, Washington
July 26-29, 2015

September 1, 2015

Treasurer's Report

Rick Beckstead, Utah

NCSSSA Treasurer's Report

Balance Sheet - As of 8/31/2015

	Balance
ASSETS:	
Checking Account	\$3,042.66
Money Market Account	\$36,542.53
Total Checking and Money Market	\$39,585.19
TOTAL ASSETS:	\$39,585.19
LIABILITIES & EQUITY:	
LIABILITIES:	
	\$0.00
EQUITY:	\$39,585.19
TOTAL LIABILITIES & EQUITY:	\$39,585.19

Cash Flow

September 1, 2014 through August 31, 2015

Category Description	9/1/2014 to 8/31/2015
INFLOWS	
2015 Dues	\$12,900.00
2015 Conference Registration	\$27,457.00
Interest Income	\$29.49
TOTAL INFLOWS	\$40,386.49
OUTFLOWS	
2015 Conference Expenses	\$18,548.61
Annual Leadership Meeting Expenses	\$5,206.90
Regional Training Expenses	\$5,492.55
Bank Fees	\$1,629.01
Liability Insurance	\$425.00
Survey Monkey	\$159.88
Misc Expenses	\$393.87
TOTAL OUTFLOWS	\$31,855.82
NET CASH FLOW FOR PERIOD	\$8,530.67
Beginning Cash Balance	\$31,054.52
Ending Cash Balance	\$39,585.19

**2015 NCSSSA Annual Dues
NOT PAID
As of August 31, 2015**

<u>State</u>	<u>Region</u>
Connecticut	I
Delaware	II
Hawaii	VII
New Hampshire	I
New Jersey	I
North Carolina	III
Puerto Rico	I
Vermont	I
Virgin Islands	I

2015 Annual Conference Registration Count

State Administrators	41
SSA	22
IRS	3
Retirees	2
Guests	3
Speakers	0



National Conference of State Social Security Administrators

65th Annual Conference
Seattle, Washington
July 26-29, 2015

July 29, 2015


Secretary's Report

Tammy Taylor, Kentucky

The Proceedings Book for the 64th Annual NCSSSA Conference held in New Orleans, Louisiana was posted to the NCSSSA Forum, <http://www.ncsssa.org/index.php>. An announcement and link was sent via Google Group to notify members that the book was currently available on the Forum. For all States not represented at this year's conference, a reminder email will be sent to the State Administrator, or their designate. A copy of the Proceedings Book has been provided to the Social Security Historian as a permanent historical record. The Proceedings Book is also available on the NCSSSA website at www.ncsssa.org/ProceedingsBook.

Many thanks are extended to NCSSSA President Vandee DeVore, for leading the NCSSSA Annual Conference. Further thanks to all NCSSSA officers and Committee members, State Social Security Administrators, Federal Social Security Administration officials, Federal Internal Revenue Service officials, and other attendees for their presentations and participation in the 2015 NCSSSA Conference.

Respectfully Submitted,


Tammy Taylor, Kentucky
NCSSSA Secretary
2014-15



A Venti Cup of Section
218 Knowledge

65th Annual Conference
Seattle, Washington
July 26-29, 2015

July 26, 2015

Region I

Stephanie Fecteau, Maine

Connecticut
Maine
Massachusetts
New Hampshire
New Jersey
New York
Puerto Rico
Rhode Island
Vermont
Virgin Islands



65th Annual Conference
Seattle, Washington
July 26-29, 2015

July 26, 2015

Region II

Thomas J. Reardon, MD

Delaware, Pennsylvania, Virginia, West Virginia, Maryland

It was a fairly quiet year. The most significant events were that we retained all five of our State Administrators: Mr. Masood of DE, Ms. Berrier of PA, Mr. Shelhammer of WV, Mr. Fasion of VA, and me. This outcome appeared unlikely early in the year, as several of us were faced with possible transitions out of this role.

The other significant event was a Regional Training in WV, which was hosted by Mr. Shelhammer. Also in attendance, were Ms. Berrier, and me. Thus, three of the Regions five States were represented.

We held a few meeting via conference call during the course of the year. However, as mentioned above, while some progress was made, there was little change in status with regard to issues in the Region.



65th Annual Conference
Seattle, Washington
July 26-29, 2015

July 26, 2015

Region III

Region VP Barbara A. Taylor, Mississippi

States

Alabama, Florida, Georgia, Kentucky, Mississippi,
North Carolina, South Carolina and Tennessee

Region III Caucus meeting convened at 2:00 p.m. in the Paradise Room, Doubletree Southcenter. States present for the meeting were:

Alabama	Kathleen Baxter and her assistant
Florida	Joyce Morgan
Kentucky	Tammy Taylor
Mississippi	Shirley Sessoms and Barbara A. Taylor

SSA OGC representative present was Natalie K. Jemison.

The primary issue brought before the caucus was determining the proper protocol to use to ensure that Section 218 issues discovered are viewed as legitimate issues by officials within applicable state. Offered suggestions by the group were:

- SSA Regional office involvement either by site visit or teleconference
- SSA Section 218 website
- Active involvement of the official in question in the process

The other topic of discussion was recommendations on how to get more states involved in the annual conference. Offered suggestions by the group were:

- Market the conference as a 'safe-free' zone... i.e. any Section 218 topic can be discuss and the discussions will be completely confidential;
- Structure the web-site forums to be region-specific so that a region and discuss issues on the web just within the region without access by other regions;
- Have the Membership Committee reach out to states based on what level of Section 218 knowledge they may have;
- Develop a "Be our Guest" campaign to attend the conference or regional training for those states that have been inactive for a minimum of 5 years. Cost will be underwritten by NCSSSA.

The group re-elected Barbara A. Taylor as Region III Vice President.

Meeting adjourned at 4:00 p.m.



65th Annual Conference
Seattle, Washington
July 26-29, 2015

July 31, 2015

Region IV

Nancy E. Burklow, Illinois

States

Illinois

Indiana

Michigan

Minnesota

Ohio

Wisconsin

There is nothing of significance to report during the 8/1/2014 through 7/31/2015 time period.

A couple of joint calls were held earlier in the year to discuss any issues, current and/or potential. Emails were sent to the state administrators when information needed to be disseminated from the regional vp.

Respectfully submitted,

Nancy E Burklow, Illinois
VP Region IV



65th Annual Conference
Seattle, Washington
July 26-29, 2015

July 26, 2015

Region V

Karen Lawrence, Oklahoma

Arkansas
Iowa
Kansas
Louisiana
Missouri
Nebraska
New Mexico
Oklahoma
Texas



65th Annual Conference
Seattle, Washington
July 26-29, 2015

Date: July 26, 2015

Region VI

Amanda Schmitgen, South Dakota

States

Colorado – Dean Conder, present, Maryann Motza, present
Montana – Meghann Butler Spring, present, Cheryl Grey, present
North Dakota – Kurt Ehrmantraut, present
South Dakota – Amanda Schmitgen, present
Utah – Rick Beckstead, present
Wyoming – Gwynne James, present

During our Regional break out session on Monday, July 27, we discussed the following state issues:

Wyoming: Police and firefighters, trying to fund the Social Security Administrator position (part of retirement system, other duties as assigned) Can we get a GAO study done? Encourage IRS & SSA to write a letter to the WY Governor and head of the Retirement system. Recognizing the difference for when a referendum needs to be done, or an error mod needs to be done.

Utah: Passed a resolution to hold referendums for covering police and firefighters, dealing with charter school issues – opinion from the IRS specific to one school claiming that they are not a governmental entity, this ruling is in conflict with the Utah AG’s office opinion, OGC opinion was requested in 2013, no response has been issued. One town with 3 employees that held a referendum and they cannot find the date that the entity began paying in to SSA, so the referendum cannot be submitted – can a b5 be done?

Montana: bi-annual legislative session 2015, updated state law during this session to clean up sections of code, two bills passed, charter schools failed to gain legislation, sharing a computer system with local government services to better track their entities and offer joint educational services, SSA form 1945 – WEP and GPO information

Colorado: Legislation from the 70's mandated that the DA's office be covered by 218, subsequently each DA's office entered into a 218 agreement and the elected DA decided that they did not want to participate and law was changed so that the elected DA was now under the state pension plan, argument was presented against this and lost in district court so all elected DA's from that point forward were not covered under 218. Police and Fire pension system because state statute has not been changed to reflect the current Federal law that police and fire are not allowed to be under a state 218 agreement. Working with the fire and police pension assoc. to double check 218 covered administrative positions against FPPA covered positions to ensure compliance with Federal law. Under state pension law for police officers required that every municipality that had a paid police force maintained a pension, but the town marshal was an exception based on time spent on the job, now issues are being brought up where members of the police departments are covered under 218 and not eligible for the pension plan. Funding for Social Security Administrator position/program because funds that had built up have been used by other programs and never reimbursed.

South Dakota: No legislation for charter schools, no new issues with exclusions or coverage

North Dakota: Not present

North Dakota Administrator, Kurt Erhmantraut, arrived after our Regional Caucus.

It was voted to have Amanda Schmitgen remain as the Region VI Vice-President.

Respectfully submitted this 29th Day of July, 2015

Amanda Schmitgen
State Social Security Administrator
State of South Dakota



65th Annual Conference
Seattle, Washington
July 26-29, 2015

July 29, 2015

Region VII

Pamella Johnson, Oregon

States

Alaska
Arizona
California
Hawaii
Idaho
Nevada
Oregon
Washington

Region VII was fortunate to have five of our eight states attend this year's conference. At this time, the State of Nevada has no one in the position of State Administrator; Hawaii has an interim administrator; and Theo Akana of California was unable to attend the conference.

A snapshot of the program year of the five represented states shows we conducted 26 referenda resulting in 21 new coverage modifications and five declinations of coverage. Of these 26 referenda, 19 were due to error modifications.

The program year was one of goodbyes and hellos. In December 2014, Paul Brugger retired as the Nevada state administrator; in April 2015, Patti Lightholder (the Seattle SSA ESLO) retired; and on July 23rd, 2015, after 35+ years of service to the State of Alaska and dedication to NCSSSA, Kay Gouyton has retired as their state's administrator.

Region VII welcomed Armond Joseph and Breyan Foltz to the world of 218 in the SSA's Seattle Regional Office. Melanie Helmick has been named Alaska's new state administrator. And, Washington state has said hello to charter schools!

Budgetary concerns, legislative changes on the state level, the challenge of employer education and outreach with ever-diminishing federal partners' budgets, a need for consistent information and policy application by SSA regional offices throughout our

region, while not unique to this program year, are anticipated to challenge us until we meet next September in Bozeman, MT.

Respectfully submitted,

Pamella Johnson
VP Region VII
Oregon State Social Security Coordinator



65th Annual Conference Seattle, Washington July 26-29, 2015

PAST PRESIDENTS

1952-53	William Farris, Tennessee	1990-91	James A. Correll, North Carolina
1953-54	Charles H. Smith, Virginia	1991-92	Nicholas C. Merrill, Jr., Illinois
1954-55	Donald M. O'Hara, Michigan	1992-93	Nicholas C. Merrill, Jr., Illinois
1955-56	Bruce Parkinson, Arizona	1993-94	Daryl Dunagan, Kentucky
1956-57	Tatum W. Gressette, South Carolina	1994-95	Steve Lortz, Nebraska
1957-58	Steven E. Schanes, New Jersey	1995-96	Dawn Evans, California
1958-59	James B. Atlee, Texas	1996-97	Johnnie Morales Sr., Texas
1959-60	Edward W. Bush, Illinois	1997-98	Russell Graves, Oklahoma
		1998-99	Charles R. Severn, Idaho
		1999-00	Donald C. Rohan, Arizona
1960-61	W. Frank DeLamar, Georgia	2000-01	Doug Peterson, South Dakota
1961-62	Frederick N. MacMillin, Wisconsin	2001-02	Maryann Motza, Colorado
1962-63	John F. Sasek, Montana	2002-03	Steve Delaney, Oregon
1963-64	B.E. "Bus" Friday, Arkansas	2003-04	Teresa Commeau, New Hampshire
1964-65	William J. Cudding, Pennsylvania	2004-05	Barry Faison, Virginia
1965-66	Carl J. Blechinger, California	2005-06	Dean Conder, Colorado
1966-67	Lawrence L. Farrell, Michigan	2006-07	Dean Conder, Colorado
1967-68	Murray L. Blegalle, Kentucky	2007-08	James Driver, Kentucky
1968-69	Robert A. Healy, Delaware	2008-09	James Driver, Kentucky
1969-70	Arnold W. Jaeger, North Dakota	2009-10	Linda Yelverton, Louisiana
1970-71	Sidney M. Van Deventer, Oklahoma		
1971-72	Abe Domain, Georgia	2010-11	Maryann Motza, PhD, Colorado
1972-73	Fred E. Henne, Arkansas	2011-12	Michele Briggs, Arizona
1973-74	Alta E. Moore, Wisconsin	2012-13	Angie Dowdy, Louisiana
1974-75	Edward A. Baublits	2013-14	Rita Foltman, Idaho
1975-76	William J. Joseph, New Jersey		
1976-77	Harold G. Purser, Oklahoma		
1977-78	Gerald P. Slaybaugh, Kansas		
1978-79	Edwin C. Gallison, Vermont		
1979-80	Purvis W. Collins, South Carolina		
1980-81	Starlene Mitchell, South Dakota		
1981-82	David I. Herbert, Pennsylvania		
1982-83	Carlos A. Gallegos, New Mexico		
1983-84	Jim Larche, Georgia		
1984-85	Daniel J. McAuley, New York		
1985-86	Gary R. King, Maine		
1986-87	Dennis B. Snodgrass, Missouri		
1987-88	Michael Blankenship, Illinois		
1988-89	Patrick Doyle, Kentucky		
1989-90	Bobby J. Malley, Mississippi		



A Venti Cup of Section
218 Knowledge

65th Annual Conference Seattle, Washington July 26-29, 2015

PAST CONFERENCE SITES

1951	Bloomington, Indiana	1990	Kansas City, Missouri
1952	Nashville, Tennessee	1991	Washington, D.C.
1953	Chicago, Illinois	1992	Newport, Rhode Island
1954	Baltimore, Maryland	1993	Louisville, Kentucky
1955	Baltimore, Maryland	1994	Olympia, Washington
1956	Atlanta, Georgia	1995	Des Moines, Iowa
1957	Denver, Colorado	1996	Denver, Colorado
1958	St. Louis, Missouri	1997	Chicago, Illinois
1959	Chicago, Illinois	1998	Biloxi, Mississippi
		1999	San Antonio, Texas
1960	Philadelphia, Pennsylvania	2000	Baltimore, Maryland
1961	San Francisco, California	2001	San Diego, California
1962	Miami Beach, Florida	2002	Rapid City, South Dakota
1963	Billings, Montana	2003	Portland, Oregon
1964	Boston, Massachusetts	2004	Merrimack, New Hampshire
1965	Milwaukee, Wisconsin	2005	Denver, Colorado
1966	Gearheart, Oregon	2006	Williamsburg, Virginia
1967	Fort Lauderdale, Florida	2007	Anaheim, California
1968	Tucson, Arizona	2008	Louisville, Kentucky
1969	San Juan, Puerto Rico	2009	Chicago, Illinois
1970	Louisville, Kentucky	2010	Kansas City, Missouri
1971	Hot Spgs Nat'l Park, Arkansas	2011	Cheyenne, Wyoming
1972	Seattle, Washington	2012	Scottsdale, Arizona
1973	New Orleans, Louisiana	2013	Philadelphia, Pennsylvania
1974	Santa Fe, New Mexico	2014	New Orleans, Louisiana
1975	Mobile, Alabama		
1976	Las Vegas, Nevada		
1977	Kansas City, Missouri		
1978	Sun Valley, Idaho		
1979	Williamsburg, Virginia		
1980	Hershey, Pennsylvania		
1981	Biloxi, Mississippi		
1982	Hartford, Connecticut		
1983	Portland, Oregon		
1984	St. Paul, Minnesota		
1985	Topeka, Kansas		
1986	Park City, Utah		
1987	Myrtle Beach, South Carolina		
1988	Boston, Massachusetts		
1989	Baltimore, Maryland		

**ROSTER
NATIONAL CONFERENCE OF
STATE SOCIAL SECURITY ADMINISTRATORS**

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PENNSYLVANIA**Region II**

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PUERTO RICO**Region I*****Jayson Padilla Morales**

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SOUTH DAKOTA **Region VI**

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TENNESSEE **Region III**

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VERMONT **Region I**

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VIRGINIA **Region II**

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VIRGIN ISLANDS**Region I**

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WEST VIRGINIA**Region II**

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WISCONSIN**Region IV**

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WYOMING**Region VI**

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NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of Mrs. Vandee DeVore; and

WHEREAS, Mrs. DeVore has supported the National Conference of State Social Security Administrators as our Conference President; and

WHEREAS, Mrs. DeVore has further aided the success of the Annual Conference as an integral member of the Legislative Committee, the Internet Communications Committee, and the Training and Succession Planning Committee, and as a presenter for the session titled ACT Committee and Section 218 Council Updates and New Information About Charter Schools;

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to Mrs. DeVore for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to Mrs. Vandee DeVore.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Dr. Maryann Motza, Colorado
First Vice-President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-01

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of **Dr. Maryann Motza**; and

WHEREAS, **Dr. Motza** has supported the National Conference of State Social Security Administrators as our Conference First Vice-President, and as the Chairperson of the Legislative Committee, and the Chairperson of the Program Committee ; and

WHEREAS, **Dr. Motza** has further aided the success of the Annual Conference as an integral member of the Training and Succession Planning Committee, and as a moderator for the session titled *Legal Framework Update*; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to **Dr. Motza** for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to **Dr. Maryann Motza**.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-02

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of **Mr. James Sawyer**; and

WHEREAS, **Mr. Sawyer** has supported the National Conference of State Social Security Administrators as our Conference Vice-President Designate and Chairperson of the Membership Committee ; and

WHEREAS, **Mr. Sawyer** has further aided the success of the Annual Conference as an integral member of the Auditing Committee, Legislative Committee, Program Committee and Training and Succession Planning Committee, and as a moderator for the session titled ACT Committee and Section 218 Council Updates and New Information About Charter Schools ; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to **Mr. Sawyer** for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to **Mr. James Sawyer**.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-03

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of Ms. Tammy Taylor, and

WHEREAS, Ms. Taylor has supported the National Conference of State Social Security Administrators as our Conference Secretary and Chairperson of the Internet Communications Committee; and

WHEREAS, Ms. Taylor has further aided the success of the Annual Conference as an integral member of the Resolution Committee and the Ad Hoc Name Change Committee ; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to Ms. Taylor for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to Ms. Tammy Taylor.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Maryann Motza, Colorado
First Vice-President 2014-2015

Resolution 2015-04

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of Mr. Richard Beckstead; and

WHEREAS, Mr. Beckstead has supported the National Conference of State Social Security Administrators as our Conference Treasurer; and

WHEREAS, Mr. Beckstead has further aided the success of the Annual Conference as an integral member of the Governing Documents Committee and the Networking Sessions Committee; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to Mr. Beckstead for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to Mr. Richard Beckstead.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-05

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of Mrs. Stephanie Fecteau; and

WHEREAS, Mrs. Fecteau has supported the National Conference of State Social Security Administrators as our Conference Region I Vice-President; and

WHEREAS, Mrs. Fecteau has further aided the success of the Annual Conference as an integral member of the Membership Committee; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to Mrs. Fecteau for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to Mrs. Stephanie Fecteau.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-06

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of Mr. T.J. Reardon; and

WHEREAS, Mr. Reardon has supported the National Conference of State Social Security Administrators as our Conference Region II Vice-President and as a presenter for the session titled ACT Committee and Section 218 Council Updates and New Information About Charter Schools; and

WHEREAS, Mr. Reardon has further aided the success of the Annual Conference as an integral member of the Governing Documents Committee, the Legislative Committee, the Program Committee, the Membership Committee, the Time and Place Committee, the Internet Communications Committee, the Training and Succession Planning Committee, and the 218 Council; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to Mr. Reardon for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to Mr. T.J. Reardon.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-07

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of *Ms. Barbara Taylor*; and

WHEREAS, *Ms. Taylor* has supported the National Conference of State Social Security Administrators as our Conference Region III Vice-President; and

WHEREAS, *Ms. Taylor* has further aided the success of the Annual Conference as an integral member of the Networking Sessions Committee, the Elections Committee, the Resolution Committee, the Membership Committee, the Internet Communications Committee, and as a moderator for the session titled *Annexations, Consolidations, and Other Transitions*; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to *Ms. Taylor* for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to *Ms. Barbara Taylor*.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-08

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of Mrs. Nancy Burklow; and

WHEREAS, Mrs. Burklow has supported the National Conference of State Social Security Administrators as our Conference Region IV Vice-President; and

WHEREAS, Mrs. Burklow has further aided the success of the Annual Conference as an integral member of the Membership Committee; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to Mrs. Burklow for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to Mrs. Nancy Burklow.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-09

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of Mrs. Karen Lawrence; and

WHEREAS, Mrs. Lawrence has supported the National Conference of State Social Security Administrators as our Conference Region V Vice-President; and

WHEREAS, Mrs. Lawrence has further aided the success of the Annual Conference as an integral member of the Membership Committee; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to Mrs. Lawrence for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to Mrs. Karen Lawrence.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-10

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of Ms. Amanda Schmitgen; and

WHEREAS, Ms. Schmitgen has supported the National Conference of State Social Security Administrators as our Conference Region VI Vice-President, and as Chairperson of the Resolution Committee; and

WHEREAS, Ms. Schmitgen has further aided the success of the Annual Conference as an integral member of the Membership Committee and the Internet Communications Committee; and

WHEREAS the National Conference of State Social Security Administrators would like to thank Ms. Schmitgen for singing the National Anthem during our opening ceremony;

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to Ms. Schmitgen for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to Ms. Amanda Schmitgen.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-11

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of *Ms. Pamella Johnson*; and

WHEREAS, *Ms. Johnson* has supported the National Conference of State Social Security Administrators as our Conference Region VII Vice-President, member of the Networking Sessions Committee, member of the Membership Committee, moderator Covering Ineligibles and Optionals; and

WHEREAS, *Ms. Johnson* has further aided the success of the Annual Conference as an integral Region VII Vice-President, member of the Networking Sessions Committee, member of the Membership Committee, moderator Covering Ineligibles and Optionals; and

WHEREAS the National Conference of State Social Security Administrators would like to thank *Ms. Johnson* for her invaluable assistance to the Program Committee; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to *Ms. Johnson* for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to *Ms. Pamella Johnson*.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of **Mrs. Rita Foltman**, and

WHEREAS, **Mrs. Foltman** has supported the National Conference of State Social Security Administrators as our Conference Past President, and as Chairperson of the Governing Documents Committee; and

WHEREAS, **Mrs. Foltman** has further aided the success of the Annual Conference as an integral member of the Networking Sessions Committee and the Training and Succession Planning Committee; and

WHEREAS the National Conference of State Social Security Administrators would like to thank **Mrs. Foltman** for ensuring that the Governing Documents Committee reviewed, edited, and voted to approve a multitude of standard operating procedures for our standing committees; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to **Mrs. Foltman** for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to **Mrs. Rita Foltman**.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-13

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of Ms. Katherine Gouyton; and

WHEREAS, Ms. Gouyton has supported the National Conference of State Social Security Administrators as the Chairperson of the Auditing Committee; and

WHEREAS, Ms. Gouyton has further aided the success of the Annual Conference as an integral member of the Networking Sessions Committee; and

WHEREAS, upon her retirement, the National Conference of State Social Security Administrators would like to further acknowledge Ms. Gouyton for her twenty-four years of service as the State Social Security Administrator for the great state of Alaska and her eighteen years of valuable contributions to the Conference as a chairperson and member of many committees, as the only editor of the Conference newsletter, and as a moderator for many conference sessions; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to Ms. Gouyton for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to Ms. Katherine Gouyton.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-14

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of Mrs. Meghann Butler Spring; and

WHEREAS, Mrs. Butler Spring has supported the National Conference of State Social Security Administrators as the Chairperson of the Time and Place Committee ; and

WHEREAS, Mrs. Butler Spring has further aided the success of the Annual Conference as an integral member of the Auditing Committee, the Program Committee, and as a presenter for the session titled State Outreach; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to Mrs. Butler Spring for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to Mrs. Meghann Butler Spring.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-15

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of Mr. Madison Davis; and

WHEREAS, Mr. Davis has supported the National Conference of State Social Security Administrators as the moderator for the session titled Modification Process from Beginning to End;; and

WHEREAS, Mr. Davis has further aided the success of the Annual Conference as an integral member of the Auditing Committee, the Governing Documents Committee, and the Time and Place Committee; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to Mr. Davis for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to Mr. Madison Davis.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-16

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of **Mr. Barry Faison**; and

WHEREAS, **Mr. Faison** has supported the National Conference of State Social Security Administrators as an integral member of the Auditing Committee, the Networking Sessions Committee, the Resolution Committee, and the Internet Communications Committee; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to **Mr. Faison** for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to **Mr. Barry Faison**.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-17

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of Ms. Melanie Piccin; and

WHEREAS, Ms. Piccin has supported the National Conference of State Social Security Administrators as the moderator for the session titled Majority Vote Referendum Education Presentation and Social Security/Medicare Benefits Implications; and

WHEREAS, Ms. Piccin has further aided the success of the Annual Conference as an integral member of the Auditing Committee, the Program Committee, and the Training and Succession Planning Committee; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to Ms. Piccin for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to Ms. Melanie Piccin.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-18

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of *Mrs. Michele Briggs*; and

WHEREAS, *Mrs. Briggs* has supported the National Conference of State Social Security Administrators as the Chairperson for the Ad Hoc Name Change Committee, and as an integral member of the Governing Documents Committee, the Networking Sessions Committee, and the Elections Committee; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to *Mrs. Briggs* for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to *Mrs. Michele Briggs*.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-19

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of *Mrs. Angie Dowdy*; and

WHEREAS, *Mrs. Dowdy* has supported the National Conference of State Social Security Administrators as the Chairperson of the Networking Sessions Committee, member of the Governing Documents Committee, member of the Legislative Committee, member of the Elections Committee, member of the Program Committee, member of the Training and Succession Planning Committee, member of the 218 Council, moderator IRS Risk Areas, presenter ACT Committee and Section 218 Council Updates; and

WHEREAS, *Mrs. Dowdy* has further aided the success of the Annual Conference as an integral Chairperson of the Networking Sessions Committee, member of the Governing Documents Committee, member of the Legislative Committee, member of the Elections Committee, member of the Program Committee, member of the Training and Succession Planning Committee, member of the 218 Council, moderator IRS Risk Areas, presenter ACT Committee and Section 218 Council Updates; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to *Mrs. Dowdy* for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to *Mrs. Angie Dowdy*.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of *Mrs. Shirley Sessoms*; and

WHEREAS, *Mrs. Sessoms* has supported the National Conference of State Social Security Administrators as an integral member of the Governing Documents Committee; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to *Mrs. Sessoms* for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to *Mrs. Shirley Sessoms*.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-21

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of **Mr. Paul Brugger**, and

WHEREAS, **Mr. Brugger** has supported the National Conference of State Social Security Administrators as an integral member of the Networking Sessions Committee, and the Resolution Committee; and

WHEREAS, the National Conference of State Social Security Administrators would like to recognize and thank **Mr. Brugger** for his participation in the Conference over the years and congratulate him on his retirement from the State of Nevada; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to **Mr. Brugger** for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to **Mr. Paul Brugger**.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-22

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of *Mrs. Joyce Morgan*; and

WHEREAS, *Mrs. Morgan* has supported the National Conference of State Social Security Administrators as an integral member of the Networking Sessions Committee, the Ad Hoc Name Change Committee, and as a moderator for the session titled *Wage Reporting 101: 1099's, W-2's, 941's, and more*; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to *Mrs. Morgan* for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to *Mrs. Joyce Morgan*.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-23

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of *Ms. Kim Smith*; and

WHEREAS, *Ms. Smith* has supported the National Conference of State Social Security Administrators as an integral member of the Networking Sessions Committee, and the Program Committee; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to *Ms. Smith* for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to *Ms. Kim Smith*.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-24

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of **Dr. Kathleen Baxter**, and

WHEREAS, **Dr. Baxter** has supported the National Conference of State Social Security Administrators as an integral member of the Legislative Committee, and as a moderator for the session titled *Differences between Majority and Divided Vote Referendum Processes and Outcomes*; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to **Dr. Baxter** for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to **Dr. Kathleen Baxter**.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-25

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of **Mr. Dean Conder**; and

WHEREAS, **Mr. Conder** has supported the National Conference of State Social Security Administrators as the Chairperson of the Training and Succession Planning Committee; and

WHEREAS, **Mr. Conder** has further aided the success of the Annual Conference as a presenter for the session titled *State Outreach*, and as a presenter for the session titled *ACT Committee and Section 218 Council Updates and New Information About Charter Schools*; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to **Mr. Conder** for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to **Mr. Dean Conder**.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-26

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of *Mrs. Mary Griffin*; and

WHEREAS, *Mrs. Griffin* has supported the National Conference of State Social Security Administrators as an integral member of the Legislative Committee, the Program Committee, the Ad Hoc Name Change Committee, and the Time and Place Committee; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to *Mrs. Griffin* for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to *Mrs. Mary Griffin*.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-27

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of *Mr. Omar Masood*; and

WHEREAS, *Mr. Masood* has supported the National Conference of State Social Security Administrators as an integral member of the Legislative Committee; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to *Mr. Masood* for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to *Mr. Omar Masood*.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-28

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of Mr. Kevin Mack; and

WHEREAS, Mr. Mack has supported the National Conference of State Social Security Administrators as the Chairperson of the Elections Committee; and

WHEREAS, Mr. Mack has further aided the success of the Annual Conference as the moderator for the session titled Joint Ventures; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to Mr. Mack for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to Mr. Kevin Mack,

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-29

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of ***Ms. Jennifer Berrier***; and

WHEREAS, ***Ms. Berrier*** has supported the National Conference of State Social Security Administrators as an integral member of the Elections Committee; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to ***Ms. Berrier*** for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to ***Ms. Jennifer Berrier***.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-30

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of **Ms. Beth Dillon**; and

WHEREAS, **Ms. Dillon** has supported the National Conference of State Social Security Administrators as an integral member of the Program Committee and the Time and Place Committee; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to **Ms. Dillon** for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to **Ms. Beth Dillon**.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-31

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of Mrs. Danielle Huffine; and

WHEREAS, Mrs. Huffine has supported the National Conference of State Social Security Administrators as a presenter for the session titled State Outreach and as a moderator for the session titled Extending Social Security Coverage to Police and Firefighter positions Already Under a Retirement System; and

WHEREAS, Mrs. Huffine has further aided the success of the Annual Conference as an integral member of the Program Committee and the Time and Place Committee; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to Mrs. Huffine for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to Mrs. Danielle Huffine.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-32

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of Mr. Grant Wright; and

WHEREAS, Mr. Wright has supported the National Conference of State Social Security Administrators as a presenter for the session titled State Outreach; and

WHEREAS, Mr. Wright has further aided the success of the Annual Conference as an integral member of the Program Committee; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to Mr. Wright for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to Mr. Grant Wright.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-33

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of **Mr. Ron Carlson**; and

WHEREAS, **Mr. Carlson** has supported the National Conference of State Social Security Administrators as an integral member of the Time and Place Committee, the Ad Hoc Name Change Committee, and the Internet Communications Committee; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to **Mr. Carlson** for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to **Mr. Ron Carlson**.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-34

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of Ms. Velda Staley; and

WHEREAS, Ms. Staley has supported the National Conference of State Social Security Administrators with her invaluable assistance creating Name Tags and Name Tents for use at our conference; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to Ms. Staley for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to Ms. Velda Staley.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-35

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of *Mr. Mark Shelhammer*; and

WHEREAS, *Mr. Shelhammer* has supported the National Conference of State Social Security Administrators as the Moderator for the session titled *Public Pension Plan Presentation*; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to *Mr. Shelhammer* for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to *Mr. Mark Shelhammer*.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-36

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of **Mr. Michael Spaid**; and

WHEREAS, **Mr. Spaid** has supported the National Conference of State Social Security Administrators as the Presenter for the session titled Public Pension Plan Presentation; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to **Mr. Spaid** for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to **Mr. Michael Spaid**.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-37

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of **Mr. Fred Sanchez**; and

WHEREAS, **Mr. Sanchez** has supported the National Conference of State Social Security Administrators as the presenter for the session titled *Joint Ventures* and a presenter for the session titled *Extending Social Security Coverage to Police and Firefighter Positions Already Under a Retirement System*; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to **Mr. Sanchez** for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to **Mr. Fred Sanchez**.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-39

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of *Mr. Kirk Larson*; and

WHEREAS, *Mr. Larson* has supported the National Conference of State Social Security Administrators as the presenter for the session titled *Majority Vote Referendum Education Presentation and Social Security/Medicare Benefits Implications*; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to *Mr. Larson* for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to *Mr. Kirk Larson*.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-40

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of *Mr. Dwayne Jacobs*; and

WHEREAS, *Mr. Jacobs* has supported the National Conference of State Social Security Administrators as a presenter for the session titled Wage Reporting 101: 1099's, W-2's, 941's, and more; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to *Mr. Jacobs* for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to *Mr. Dwayne Jacobs*.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-41

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of **Mr. John Fox**; and

WHEREAS, **Mr. Fox** has supported the National Conference of State Social Security Administrators as the presenter for the session titled *Covering Ineligibles and Optionals* and as a presenter for the session titled *Extending Social Security Coverage to Police and Firefighter Positions Already Under a Retirement System*; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to **Mr. Fox** for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to **Mr. John Fox**,

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-42

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of *Ms. Susan Bussman*; and

WHEREAS, *Ms. Bussman* has supported the National Conference of State Social Security Administrators as a presenter for the session titled *Legal Framework Update*; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to *Ms. Bussman* for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to *Ms. Susan Bussman*.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-43

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of Mr. Benjamin Prevas; and

WHEREAS, Mr. Prevas has supported the National Conference of State Social Security Administrators as a presenter for the session titled Legal Framework Update; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to Mr. Prevas for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to Mr. Benjamin Prevas.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-44

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of Mr. Anthony Roda; and

WHEREAS, Mr. Roda has supported the National Conference of State Social Security Administrators as a presenter for the session titled Legal Framework Update and as a presenter for the session titled ACT Committee and Section 218 Council Update and New Information About Charter Schools; and

WHEREAS, Mr. Roda went above and beyond our expectations by graciously agreeing to call in and present his portion of our program when unforeseen circumstances prevented him from attending in person; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to Mr. Roda for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to Mr. Anthony Roda.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-45

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of *Mr. Paul Marmolejo*; and

WHEREAS, *Mr. Marmolejo* has supported the National Conference of State Social Security Administrators as a presenter for the session titled *IRS Risk Areas*; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to *Mr. Marmolejo* for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to *Mr. Paul Marmolejo*.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-46

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of *Ms. Natalie Jemison*; and

WHEREAS, *Ms. Jemison* has supported the National Conference of State Social Security Administrators as a presenter for the session titled *Differences Between Majority and Divided Vote Referendum Processes and Outcomes*; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to *Ms. Jemison* for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to *Ms. Natalie Jemison*.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-47

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of *Mr. Kirk Jockell*; and

WHEREAS, *Mr. Jockell* has supported the National Conference of State Social Security Administrators as a presenter for the session titled *Differences Between Majority and Divided Vote Referendum Processes and Outcomes* and as the presenter for the session titled *Modification Process from Beginning to End*; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to *Mr. Jockell* for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to *Mr. Kirk Jockell*.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-48

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of Ms. Amy Bland; and

WHEREAS, Ms. Bland has supported the National Conference of State Social Security Administrators as a presenter for the session titled Annexations, Consolidations, and Other Transitions; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to Ms. Bland for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to Ms. Amy Bland.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-49

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of *Ms. Shalyn Timmons*; and

WHEREAS, *Ms. Timmons* has supported the National Conference of State Social Security Administrators as a presenter for the session titled *Annexations, Consolidations, and Other Transitions*; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to *Ms. Timmons* for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to *Ms. Shalyn Timmons*.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-50

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of Ms. Nancy Pennington; and gratefully thanks her for her assistance in the RFP process for the 2017 Charleston, West Virginia NCSSSA Conference

WHEREAS, Ms. Pennington has supported the National Conference of State Social Security Administrators as an integral adjunct-member of the Time and Place Committee

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to Ms. Pennington for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to Ms. Nancy Pennington.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-51

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of **Mr. Alan Heim**; and

WHEREAS, **Mr. Heim** has supported the National Conference of State Social Security Administrators by delivering the keynote address at our annual conference; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to **Mr. Heim** for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to **Mr. Alan Heim**.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-52

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of **Mr. Clark Fletcher**, and

WHEREAS, **Mr. Fletcher** has supported the National Conference of State Social Security Administrators as a presenter for the session titled *Wage Reporting 101: 1099's, W-2's, 941's, and more* and as a presenter for the session titled *IRS Risk Areas*; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to **Mr. Fletcher** for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to **Mr. Clark Fletcher**.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-53

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of **Mr. Glen Gainer**, and

WHEREAS, **Mr. Gainer** has supported the National Conference of State Social Security Administrators by his assistance with the April 2015 Regional Training in Charleston, WV, and as an important contributor to the Training and Succession Planning Committee; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to **Mr. Gainer** for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to **Mr. Glen Gainer**.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-54

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of *Mrs. Nancy Pennington*; and

WHEREAS, *Mrs. Pennington* has supported the National Conference of State Social Security Administrators by her assistance with the April 2015 Regional Training in Charleston, WV, and as a valuable contributor to the Training and Succession Planning Committee; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to *Mrs. Pennington* for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to *Mrs. Nancy Pennington*.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-55

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of Mr. Mark Shelhammer; and

WHEREAS, Mr. Shelhammer has supported the National Conference of State Social Security Administrators by his assistance with the April 2015 Regional Training in Charleston, WV, and as a valuable contributor to the Training and Succession Planning Committee; and

WHEREAS, Mr. Shelhammer went above and beyond our expectations and was a gracious and accommodating host to our visiting members; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to Mr. Shelhammer for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to Mr. Mark Shelhammer.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-56

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of **Mr. Richard Beckstead**; and

WHEREAS, **Mr. Beckstead** has supported the National Conference of State Social Security Administrators by his assistance with the March 2015 Regional Training in Salt Lake City, UT, and as a valuable contributor to the Training and Secession Planning Committee; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to **Mr. Beckstead** for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to **Mr. Richard Beckstead**.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-57

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of *Mrs. Patricia Lightholder*; and

WHEREAS, *Mrs. Lightholder* has supported the National Conference of State Social Security Administrators during her sixteen years of service with SSA, nine years of which were spent serving the Seattle Region, and three years spent working with Section 218; and

WHEREAS, the National Conference of State Social Security Administrators would like to acknowledge *Mrs. Lightholder's* years of public service and offer our heartfelt congratulations to her upon her retirement; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to *Mrs. Lightholder* for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to *Mrs. Patricia Lightholder*.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-58

NCSSSA

National Conference of State Social Security Administrators



*WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of
The American Legion Renton Post 19; and*

WHEREAS, The American Legion Renton Post 19 has supported the National Conference of State Social Security Administrators during our annual conference with their Presentation of Colors at our opening session; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to The American Legion Renton Post 19 for helping us create a successful Conference; and

*BE IT FURTHER RESOLVED that the Conference president forwards this resolution to
The American Legion Renton Post 19.*

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-59

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of Mr. Carlos Villa; and

WHEREAS, Mr. Villa has supported the National Conference of State Social Security Administrators as an employee of PSAV, and by providing excellent service setting up our Audio Visual equipment; and

WHEREAS, Mr. Villa has further aided the success of the Annual Conference by going above and beyond our expectations in his assistance setting up a last minute call in for one of our distinguished guests; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to Mr. Villa for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to Mr. Carlos Villa.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-60

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of *Ms. Stephanie Clarey*; and

WHEREAS, *Ms. Clarey* has supported the National Conference of State Social Security Administrators as an employee of the DoubleTree Suites by Hilton, Southcenter, and by providing excellent service setting up our Banquet services; and

WHEREAS, *Ms. Clarey* has further aided the success of the Annual Conference by going above and beyond our expectations with her assistance accommodating our special needs; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to *Ms. Clarey* for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to *Ms. Stephanie Clarey*.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-61

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of Ms. Diana Jimenez; and

WHEREAS, Ms. Jimenez has supported the National Conference of State Social Security Administrators as an employee of the DoubleTree Suites by Hilton, Southcenter, and by providing excellent service to all of our conference attendees; and

WHEREAS, Ms. Jimenez has further aided the success of the Annual Conference by going above and beyond our expectations with her assistance accommodating our special needs; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to Ms. Jimenez for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to Ms. Diana Jimenez.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-62

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of *Ms. Diane Witt*; and

WHEREAS, *Ms. Witt* has supported the National Conference of State Social Security Administrators as an employee of the DoubleTree Suites by Hilton, Southcenter, by working closely with our Time and Place Committee on our hotel contracts, and by providing excellent service to all of our conference attendees; and

WHEREAS, *Ms. Witt* has further aided the success of the Annual Conference by going above and beyond our expectations with her assistance accommodating our special needs; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to *Ms. Witt* for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to *Ms. Diane Witt*.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-63

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of *Ms. Diana Waddell*; and

WHEREAS, *Ms. Waddell* has supported the National Conference of State Social Security Administrators as an employee of the DoubleTree Suites by Hilton, Southcenter, by working closely with our membership in setting up our Conference Events, and by providing excellent service to all of our conference attendees; and

WHEREAS, *Ms. Waddell* has further aided the success of the Annual Conference by going above and beyond our expectations with her assistance accommodating our special needs; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to *Ms. Waddell* for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to *Ms. Diana Waddell*.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-64

NCSSSA

National Conference of State Social Security Administrators



WHEREAS, the National Conference of State Social Security Administrators at its 65th annual meeting in Seattle, Washington, gratefully acknowledges the participation of Ms. Josie Colado; and

WHEREAS, Ms. Colado has supported the National Conference of State Social Security Administrators as an employee of the DoubleTree Suites by Hilton, Southcenter, by working closely with our membership in setting up our Conference Events, and by providing excellent service to all of our conference attendees; and

WHEREAS, Ms. Colado has further aided the success of the Annual Conference by going above and beyond our expectations with her assistance accommodating our special needs; and

THEREFORE, be it resolved that the National Conference of State Social Security Administrators, duly expresses our appreciation and sincere thankfulness to Ms. Colado for helping create a successful Conference; and

BE IT FURTHER RESOLVED that the Conference president forwards this resolution to Ms. Josie Colado.

ADOPTED THIS 26th DAY OF JULY, 2015 AT THE 65th ANNUAL NCSSSA MEETING IN SEATTLE, WASHINGTON.

Vandee DeVore, Missouri
President 2014-2015

Tammy Taylor, Kentucky
Secretary 2014-2015

Resolution 2015-65