

**PATHWAYS
TO
ECONOMIC SECURITY
FOR
PEOPLE WITH DISABILITIES**



Richard Balkus, Associate Commissioner
Office of Program Development and Research
Social Security Administration

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The SSA Strategic Plan and the Disability Program

Disability initiatives feature prominently in the new Agency Strategic Plan, including 2 of the 4 major ASP goals:

- 1) Eliminate hearings backlog and prevent recurrence.
- 2) Improve speed and quality of disability process.
 - Long term outcome: Make it easier for disabled individuals to return to work.
 - Simplify work incentive programs.
 - Conduct research and demonstration projects to study ways to improve our services, tie objective medical data to functionality, and address the varied needs of individuals with disabilities.

Mental Health Treatment Study

GOAL: Determine intervention elements with greatest impact on return-to-work efforts of SSDI beneficiaries with schizophrenia or affective disorder.

BACKGROUND: Many SSDI beneficiaries qualifying for benefits due to a mental disorder do not receive treatment or employment support services to help increase their ability to work.

DESIGN:

- 1,000 treatment and 1,000 control participants.
- 23 treatment sites coordinate treatment and employment supports.
- Two-year interventions provide oversight of employment and treatment activities, and pay health insurance premiums and out-of-pocket expenses for supports and treatment.

STATUS:

- Mid-way through field portion of study.
- At 5th quarterly interview, 34% of treatment group and 21% of controls were recently employed in competitive jobs.
- MHTS researchers will model site costs to determine the adequacy of payments to TTW Employment Networks.

Final Report in February 2011.

Accelerated Benefits

GOAL: Estimate benefits and costs of eliminating the 24-month Medicare waiting period.

BACKGROUND: Currently, beneficiaries must complete a 5-month waiting period for cash benefits and an additional 24-month waiting period for Medicare.

DESIGN:

- Includes 2,000 new SSDI beneficiaries under age 55 with no health insurance and at least 18 months from Medicare eligibility.
- Phase I (66 participants) tested the enrollment process and provided target population information.
- Phase II enrollment began in March 2008.

STATUS: Enrollments ahead of schedule.

- Expect to complete enrollment in December 2008.
- Health benefit expenditures are on target.
- Transition to Medicare will occur mid-2009 through December 2010.

Final report in January 2011.

Benefit Offset National Demonstration (BOND)

GOAL: Will test the impact of \$1 for \$2 offset of earnings above SGA level.

INTERVENTIONS:

- Once SSDI beneficiary completes the Trial Work Period and Grace Period, participant earnings above SGA will be offset \$1 for \$2 (\$940/month in 2008; \$1570 for blind beneficiaries) during the Extended Period of Eligibility.
- Stage 1, includes only benefit offset.

- Stage 2 includes enhanced benefit counseling:
 - a) About 5 times the counselor-beneficiary contact time of regular counseling.
 - b) Long term advising relationship.
 - c) Help beneficiaries determine best path to take, and helping them along that path.
 - d) Addressing a broader range of financial components.
 - e) Providers include other qualified local organizations in addition to WIPA grantees.
 - f) More employment options and a broader range of financial effects. More guidance on steps to take and assistance on taking the steps.
 - g) Work Incentives and Long-term support plans.
 - h) Tax summary and analysis.

DESIGN: Two-stage random assignment design:

Stage 1: Randomly assign beneficiaries to either:

- a) Benefit offset group [80,000 DI and concurrent]
- b) Control group [320,000 DI and concurrent]
- c) Stage 2 eligible group [400,000 DI only].

Stage 2: Randomly assign DI only volunteers to either:

- a) Benefit offset only group [4,800]
- b) Benefit offset with enhanced benefits counseling group [3,000]
- c) Enhanced benefits counseling only group [3,000]
- d) Control group [4,800].

History

- Ticket to Work and Work Incentives Improvement Act of 1999 mandated a title II \$1 for \$2 reduction demonstration project.
- 4-State pilot conducted beginning in 2005.
- BOND will be conducted in 10 areas around the country (SSA Area Offices).
- SSA awarded contract to Abt Associates for project design.

Demonstration Areas

- 4-State Pilot: Connecticut, Utah, Vermont, Wisconsin.
- National Demonstration: 10 areas
 - Boston (Maine, New Hampshire, Vermont)
 - Albany NY
 - Chicago 2 (Wisconsin)
 - Chicago 3 (Michigan East-Detroit, Dearborn)
 - Alabama
 - South Florida (Miami, Ft. Lauderdale, Tampa)
 - Southeast Texas (Houston)
 - Silver Spring MD
 - Denver 2 (Colorado, Wyoming)
 - SE California and Arizona

Status

- Design phase ended September 2008.
- Intercomponent SSA workgroup formalizing SSA's BOND-related policies, as well as designing the business process and technical requirements.

Timeline

- Document BOND business process and system requirements: Fall, 2008.
- Build System requirements for project: 2008–2009.
- Complete and award BOND implementation contract in 2009.

Youth Transition Demonstration Project

GOAL: Develop and evaluate youth transition demonstration projects intended to help young people with disabilities make the transition from school to work.

INTERVENTIONS: By waiving certain disability program rules and offering services to youth who are receiving disability benefits or are at risk of receiving them, the projects are expected to encourage youth to work and/or continue their education.

- Individualized work-based experiences
- Youth empowerment and family supports
- System linkage facilitation services
- Social and health services
- Benefits Counseling

YTD SSA waivers:

- Student Earned Income Exclusion
- General Earned Income Exclusion
- Plan to Achieve Self-Support
- Individual Development Accounts
- Continuing Disability Reviews and Age 18 Redeterminations

DESIGN:

- 8 sites nationally; 6 participate in random assignment national evaluation: CO, FL, MD, CUNY, NY Erie, WV. CA and MS are not random assignment sites.
- 480 treatments and 400 controls at each evaluation site.
- 500 in CA and 165 in MS.

History

Project Phases

- 2003: Seven cooperative agreements awarded
- 2005: SSA strengthened evaluation using random assignment design, requiring new projects
- 2006: SSA & MPR selected 5 applicants to pilot projects for 6 months
- 2007: SSA & MPR selected 3 of the 5 pilot projects to add to YTD
- 2008: Waivers applied for fixed period for all RA participants

MPR Contract/Random Assignment Sites

- 2005: Evaluation contract awarded
- 2005 to 2007: Additional projects selected

Cooperative Agreements

- 2003: Original cooperative agreements awarded
- 2007: Assessment reports for RA projects
- 2008: Non-RA projects end September 30—waivers end for non-RA participants

Status

Enrollment

- Colorado: Enrollment ended 4/30/08
- NY CUNY: Enrollment ends 1/31/09
- NY ERIE: Enrollment ended 4/30/08
- FL Abilities: Enrollment ends 9/30/10
- WV HRDF: Enrollment ends 4/30/10
- MD CTP: Enrollment ends 6/10

Interventions implemented at all sites.

Efforts To Outcome/Data Collection Refresher Training currently in progress for all sites.

TA on job development and benefits planning currently in progress at all sites.

Evaluation Design report, currently in comments stage.

Preliminary Findings

As of August 2008, 375 of the 1,736 YTD participants (about 22%) were employed full-time or part-time. As a rough comparison, only about 11% of all SSI recipients aged 18-21 were working as of December 2006.

In CO, CUNY, and Erie combined, about 65% of youths have received an employment contact. In FL, MD, and WV, about 86%.

Examples of Individual Site Achievements

The Mississippi Youth Transition Innovations project helped 11 youths establish IDAs. Savings to date total about \$49,600.

The California project, Bridges to Youth Self Sufficiency, started a Project Search site with three hospitals.

- Three participants completed internships and are employed in medical records, human resources, and cardiology.
- A fourth participant used his earnings to buy a home.
- A fifth worked his way off SSI benefits (retains Medicaid).

Colorado's Work Incentive Network of Supports has established or is establishing 5 IDAs to help participants save for college or buy a home.

The CUNY YTD project held group workshops for participants and their families. This summer, 25 participants averaged 129 hours of work and \$1,000 in earnings.

Timeline

2009: Non-RA projects end

2009: 12 month impact and process analysis reports

2009: Project assessment reports

2009: Process analysis reports

2010: 24 month impact reports

2011: 12 month impact reports

2012: 24 month impact reports

2014: Final report, including 36 and 48 month impacts, cost benefit and process summary