Lessons Learned from SSA Demonstrations: A State of the Science Meeting

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Transcript of 10:00 – 10:10 a.m. EDT: Opening Remarks
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Welcome, everyone, to the State of the Science Meeting on Lessons Learned from SSA Demonstrations. We have a long day. I'm Austin Nichols from Abt Associates, and I just want to tell you a little bit about how the day will proceed. Next slide, please. We have 8 sessions and a keynote address. The 8 sessions are organized into 4 panels, and after each panel, each pair of sessions, we will have an open discussion and Q & A. But to kick things off, we'll have Jeffrey Hemmeter from SSA provide some context around this meeting and the day's events. Take it away, Jeff.

Thank you. Awesome. Good morning, everybody. I'm Jeff Hemmeter and it is my distinct pleasure to welcome you to the Lessons Learned from SSA Demonstrations State of Science meeting. I work in the office of research, demonstration, and employment support at the Social Security Administration, and we're responsible for return to work policies including Ticket to Work and related programs and demonstrations. If you're not sure what we mean by demonstrations, or not familiar with the programs will be talking about today, I want to give you a very brief background.

I hope you know that SSA administers the programs. These 2 programs together, provide over 12 Million people with disabilities income security, because they are unable to engage in substantial gainful activity, or have marked severe functional limitations due to a medically determined disability, or rely on somebody who receives social security benefits. SSDI is a social insurance program funded by payroll taxes with a benefit determined by your earnings history. SSI is a means tested cash transfer program that guarantees a minimum income for people who qualify with low income and assets.

Both programs also generally confer eligibility for medical care. Medicare for SSDI beneficiaries after a waiting period and Medicaid for most SSI recipients. Even though adults generally must be unable to engage in substantial gainful activity to enroll in the program, they can work if they are able. And there are a number of work incentives in each program that keep benefits from being immediately lost. These can be complicated and many people may not be aware of them.

People may also simply just not be willing or able to work. Regardless of the reason, relatively few beneficiaries and recipients work historically, only about one half of 1% of workers exit the program due to work every year. The numbers are more promising, if you look at beneficiaries experiences, over time, but still relatively low. For SSI, about 5% of adult recipients are historically working in any given month and 3% of member recipients are terminated. Most, but not all the demonstrations, we will be discussing today have dealt with the topic of work and benefit receipt either by directly changing SSA policies or by providing additional services and supports, or a combination of interventions. Next slide.

The commissioner of SSA is able through 2 different legislative authorities to test changes to program rules for the provision of new services. Section 234, so called because of its location in the Social Security Act, provides us with the authority to change the SSDI program rules, to promote labor force

participation. One important aspect of section 234 is that it is temporary. It was last renewed in 2015 and will sunset at the end of 2022. Section 1110 provides SSA the permanent authority to conduct general research, including tests of new services and to wave program rules. There are lots of rules that go along with these authorities, that I want to mention too, that might help you understand some of the demonstrations you will hear about today.

First, both authorities require that participation in demonstrations be voluntary and revokable. SSA cannot force a participant to participate in them. That wasn't always the case. So, and there is 1 demonstration the benefit offset national demonstration that did include mandatory participation.

Second, waivers cannot make a participant financially worse off. While the goal of demonstrations is to improve the lives of participants through work. But are other means there are various ways of doing so ranging from entices to work, or receive services to imposing additional requirements for people to do. So these two provisions generally mean SSA is limited to interventions that make participants better off without imposing new or more restrictive requirements. Even the one mandatory demonstration I mentioned was designed, so as to only be financially advantageous to the beneficiary. Moreover, SSA takes its ethical obligations to demonstration participants very seriously. Although SSA is a signatory to the federal policy for the protection of human subjects also known as the common rule, in many ways the authorities are more restrictive than those regulations and most, if not, all of the demonstrations reviewed today received approval from an institutional review board, even though they could technically be exempt from the common rule.

These demonstrations cover a wide range of populations, policies and services from youth to older beneficiaries, from current beneficiaries to denied applicants to potential applicants, from individuals with mental impairments to individuals with all impairments. Uh, topics have ranged from benefit offsets, to improved coordination and services, to medical insurance during the waiting period. There are demonstrations where SSA worked unilaterally and demonstrations where we collaborated with a variety of federal partners.

One thing you'll note about today, is that there is not a session that goes through each of the demonstrations. Doing so would take an enormous amount of time and we have a packed agenda. If you're unfamiliar with a demonstration, I strongly encourage you to review the brief summaries posted on the event web page or SSA's annual demonstration report, posted on our own website, to which there's a link on the event website. In general, and as you'll hear more about in the topical panels, the policies tested in the demonstrations have been more successful at increasing employment and less successful at lowering benefit payments or increasing earnings. Next slide.

Today we'll hear from a variety of researchers and disability and social policy experts who have spent several months reviewing essays, demonstrations, putting them in the appropriate context, and pulling out lessons. Our goal from this exercise is to make sure that we've gained as much information from these resource intensive evidence building activities as we can in order to apply their lessons to policy. We also hope to learn more about the ways to improve how we implement and evaluate the demonstrations. And just a fair warning, we will be starting with a fairly technical panel on the methods of demonstrations.

Before handing this back to Austin. I want to thank him, Jennifer Bagnall Stuart, Cara Sierks, Michelle Wood, Laura Peck, Danny Gubits, Sarah Prenovitz and all the rest of the Abt team and the folks at the Hatcher Group who were organizing this meeting. I also want to thank all the experts gathered today for their time and efforts. Finally, I want to thank the contractors who worked on the demonstrations and most importantly, all the staff at who have ever worked on these demonstrations. They are often massive undertaking that came to setting up new federal programs. And in an operations focused agency, like SSA, these products are often not the highest priority, yet staff do their best to make them happen within very real constraints. There are too many people to name, but I want to say, thank you to all of them for making these important evidence generating studies possible. I hope you find the presentations and discussion interesting and encourage you to ask questions. I'll hand this back over to Austin for some additional information about meeting logistics. Thank you.