

RETIREMENT AND DISABILITY RESEARCH CONSORTIUM

To help make the strongest possible case for your proposal, please consider ways to tie your research to this Scope of Work and one or more **Focal Areas for Year 1** (next page).

As you consider possible co-authors, be aware that SSA is very interested in receiving proposals using approaches from other social and behavioral sciences (sociology, demography, public health, psychology, law, etc) to study one or more of the priority research areas. They also strongly encourage participation from Historically Black Colleges and Universities, Hispanic-American Colleges and Universities, and other Minority Serving Institutions.

Scope of Work

All research and other activities must fall within the scope described below.

At the broadest level, proposed RDRC center research and activities must be relevant to at least one of SSA's program areas or populations. Some research may speak directly to one or two programs and the distributional, behavioral, or adequacy issues related to those programs. Other research – including how to advance equity efforts, examine how structural barriers affect the program populations that SSA serves, and explore opportunities to reduce barriers – is foundational and may support policy evaluation for all three programs. Proposed research activities may employ a variety of approaches to contribute to the evidence base for policy, including descriptive and causal studies, simulations, qualitative and mixed-methods research, international comparisons, and community-engaged research.

Old-Age and Survivors Insurance (OASI)

OASI benefits are essential to the economic well-being of millions of aged Americans, providing benefits to retired workers, their spouses and dependents, and the survivors of deceased insured workers. Policymakers rely on research that increases understanding of this population, assesses the effects of recent or proposed policy changes, and analyzes long-term program trends.

Disability Insurance (DI)

Social Security pays DI benefits to eligible workers who can no longer work because they have a medical condition that is expected to last at least one year or result in death. The program also covers certain family members of DI-eligible workers. Research in this area may include topics such as identifying the population(s) who may be eligible for benefits but are not applying, understanding challenges faced by the population(s), and exploring ways to overcome these challenges.

Supplemental Security Income (SSI)

SSI provides monthly payments to individuals with low income and few assets who have a disability or are aged. Research on SSI helps us understand program trends and clarifies how work and other factors influence eligibility and welfare. Targeted research initiatives can evaluate the efficacy of specific program interventions or policy changes as well as discover possible unmet needs, barriers to program access, effectiveness of outreach efforts, and areas for program improvement.

Cross-Program Topics

None of the three SSA programs (OASI, DI, and SSI) operates in a vacuum. Some aspects of each program are unique and require dedicated research projects, but research initiatives may support cross-program knowledge building. There is significant value in supporting cross-program research because of its applicability to any or all the individual program areas.

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Focal Areas are more narrowly defined topics for research. In Year 1, SSA will specifically be looking for research that addresses six focal areas, summarized below. The full list of focal area questions is located at: <https://www.ssa.gov/policy/extramural/rdrc-focal-areas-FY2024.pdf>

Focal Area 1: Disparities by Race, Ethnicity, and Sex. SSA continues to be very interested in research on racial, ethnic, and sex equity related to Social Security. SSA is particularly interested in the structural barriers that may contribute to disparate outcomes by race, ethnicity, and sex. We expect researchers to consider such disparities when developing proposals addressing all focal areas.

Focal Area 2. Addressing Barriers to Disability Program and SSI Program Participation. For more than a decade, applications for DI and SSI benefits have been falling at a faster pace than originally projected based on actuarial models. However, the causes of this rapid decline are less well understood. SSA encourages studies that examine the possible drivers of this decline and the impact it has had on our programs and populations. We are particularly interested in studies that identify barriers that may either keep eligible individuals from applying initially or that make it difficult for them to complete the application and appeals processes.

Focal Area 3: Economic Security of Program Applicants and Beneficiaries. SSA continues to be interested in the evolving risks to economic security and how future beneficiary cohorts will fare. Research should take a broad view, looking at all sources of economic security as well as the spectrum of resource needs to address financial risks, including long-term care. Research should also examine differences across (and within) various population subgroups (e.g., by comparing economic outcomes of women of color with those of white women).

Focal Area 4: Understanding Service Needs. In 2021, 70 million people received benefits from programs administered by SSA, of which 5.4 million were newly awarded benefits (including new entrants to the benefit rolls and persons already on the rolls who became entitled to a different benefit). Given the importance of Social Security to so many people, SSA is continuously looking for ways to improve how we deliver services to the public – particularly to communities facing barriers in accessing our services – to meet their changing needs. We are interested in studies that help us identify advancements in how we deliver quality, accurate, and timely service to our customers.

Focal Area 5: Understanding Communication Needs. Effective communication and outreach about Social Security is critical to enable the public to make informed decisions about their own benefits and to make them aware of benefits to which they may be entitled. Communications from SSA also affect the public's understanding of Social Security more broadly, including the program's long-term future and the effects of potential policy changes. We are interested in research that examines – and identifies areas of improvement – the efficacy of agency communications (including the Social Security Statement, my Social Security, and other notices) and outreach efforts. Generally, we are interested in studies that address Question 4 in the SSA Learning Agenda, "What are the effects of changes to our communication methods on customer satisfaction, program integrity, and administrative efficiency?"

Focal Area 6: Addressing Employment Barriers for People with Disabilities. The DI program includes a set of work incentives, which are special rules, intended to help beneficiaries enter, re-enter, or continue their engagement in the workforce by protecting their eligibility for cash payments and health care coverage until their work allows them to be self-sufficient. As we look to increase the number of beneficiaries who return to work, we seek evidence on successful models for providing employment services and on barriers to employment. Studies could examine this topic both in terms of labor demand and labor supply.