Center for Financial Security | Retirement & Disability Research Center

UNIVERSITY OF WISCONSIN-MADISON

News from the CFS RDRC

Training Tomorrow's Project Investigators Today

Training and mentoring students and junior faculty are at the core of the Center for Financial Security Retirement and Disability Research Center's (CFS RDRC) mission. Focused training of undergraduate, graduate, and professional school students, especially students from underrepresented backgrounds and from a range of disciplines, on issues relevant to SSA is a key priority across all center programs and research. The CFS RDRC vision is to develop a cohort of scholars who will become tomorrow's project investigators. This newsletter will provide an account of our Junior Scholar Intensive Workshop (JSIT), as well as other upcoming training and learning opportunities like the RDRC Annual Meeting.

JSIT Summer Workshop 2021

For a week in June 2021, the Center for Financial Security (CFS)—in collaboration with Howard University's Center on Race and Wealth, and supported by the Retirement and Disability Research Consortium of the Social Security Administration—held the annual summer workshop of Junior Scholar Intensive Training (JSIT) program. This year's JSIT workshop was virtual, allowing participation from Minnesota to Mississippi, and California to Cambridge (England!).

JSIT is a mentored training program aimed at diversifying social insurance research and it's intersections with retirement and disability programs. JSIT provides scholars with training to develop their own research ideas into proposals that are then eligible for small research awards and other funding.

This year's JSIT cohort includes 14 scholars from variety of disciplines –

economics, public policy, sociology, and social work – who completed the weeklong intensive training. JSIT introduces emerging researchers to the field of retirement and disability research specifically, and social insurance research more broadly. Faculty and guest speakers covered a lot of ground: identifying meaningful, policy-relevant research questions and appropriate data sources; working with data sets, including administrative data; best practices in communicating and translating research findings; and building a productive, lasting mentor relationship.

Mentors to the JSIT scholars this year include Fenaba Addo (UNC-Chapel Hill), Manasi Deshpande (University of Chicago), Itzik Fadlon (UC San Diego), Bradley Hardy (American University), Timothy Moore (Purdue University), Gargi Chaudhuri (UW-La Crosse) and Carly Urban (Montana State University). Additional mentorship is provided by the JSIT core faculty: J. Michael Collins (UW-Madison), Justin Sydnor (UW-Madison) and Mary Hamman (UW-La Crosse).

Throughout the summer, the cohort has been working asynchronously on their data skills in DataCamp. Mary Hamman leads the data science training in DataCamp, and provides invaluable one-on-one time with each scholar. In September the scholars will have a chance to submit their refined research proposals for one of five small JSIT Research Awards, which culminates in a SSA style working paper.

We are excited for the JSIT scholars' futures and hope JSIT has positioned them well to advance through the RDRC pipeline! For more information on JSIT and the 2021 cohort, visit: https://cfsrdrc.wisc.edu/events/jsit-summer-workshop-2020

Spotlight on Research:

Improving Communication, Understanding, and Outreach

Using Online SSDI Conversations to Improve Communication and Outreach
Lydia Ashton & Nancy Wong

Text analysis of data collected from online forum conversations reveals that Social Security Disability Insurance (SSDI) applicants and recipients share concerns and confusion about the application, appeal, and continuing disability review (CDR) rules and policies. For example, many SSDI customers (e.g., veterans) do not understand how the substantial gainful activity (SGA) rule is applied. These applicants also experience significant differences across program offices and geographic regions on the application of rules and/or the interpretation of these rules (e.g., how disability, medical improvement, or SGA is defined). Preliminary results from Year 2 project suggest that confusion about how SSDI rules are interpreted

and applied significantly contribute to high SSDI rejection and appeal rates. This study intends to build upon Year 2 project findings to provide insights on designing effective communication strategies to reduce confusion and aid in improving customer service experiences and welfare. Specifically, the study aims to: 1) identify the major areas of confusion about SSA rules and decision criteria using a machine-learning hybrid approach for Natual Language Processing (NLP) and text analytics, and 2) evaluate the impact of how and when SSA customers obtain such information that impact their subsequent interpretation of this information.

Improving Public Understanding of OASI: An Experimental Approach

Pam Herd, Sebastian Jilke, Don Moynihan

Many express doubts about the financial stability of the Old Age and Survivors Insurance (OASI) program and specifically whether they will receive Social Security benefits when they retire. Half of individuals aged 51-64 say they worry a great deal about whether they will receive their retirement benefits and more generally about the financial stability of the program. This skepticism is of concern given that these same individuals are currently paying Social Security taxes, which fund benefits for current retirees. To address this problem, this project will measure base levels of understanding regarding the financial stability of the program and test differing interventions to improve the public's understanding of the issue and increase confidence in the Social Security Administration and the possibility of a political solution. The study will implement survey-based experiments among a representative sample of the U.S. population, and examine the efficacy of new communication strategies by comparing them against current modes of communication by the Social Security Administration. The project will provide evidence-based recommendations to inform the Social Security Administration's outreach and communication efforts.

Events & Opportunities

2021 Retirement and Disability Research Consortium Annual Meeting

The 23rd Annual Meeting of the Retirement and Disability Research Consortium (RDRC) will be held virtually on August 5 and 6, 2021. The meeting agenda is posted here and registration is open to anyone interested in the work of the RDRC. Visit CRR's Squared Away Blog for a summary of

the research to be presented over the two-day event.

Presenters and Panels:

[Kilolo Kijakazi](#) is the acting commissioner of the United States Social Security Administration and will provide opening remarks. The second day of the event will open with keynote speaker, [Valerie Wilson](#) director of the Economic Policy Institute's Program on Race, Ethnicity, and the Economy (PREE), delivering an address on "Race, Ethnicity and Financial Well-being".

August 5th panel topics include:

- Panel 1: *Understanding the Effects of the Coronavirus Pandemic on Retirement and Disability*
- Panel 2: *Disability Programs and Well-being*
- Panel 3: *Retirement Planning and Preparedness*

August 6th panel topics include:

- Panel 4: *Public Understanding of Social Security Programs and Service, and Vulnerability to Fraud*
- Panel 5: *Disability Applications and Outcomes*
- Panel 6: *Health Shocks and Retirement*

Register Now

Retirement and Disability Social Policy in Residence Postdoctoral Fellowship Program: Open Call for Applications

The Retirement and Disability Social Policy in-Residence Mentored Fellowship Program is an interdisciplinary program providing mentored postdoctoral fellowships in the field of retirement and disability research. it provides renewable one-year postdoctoral fellowships for recent PhD recipients. Fellows will conduct research on topics related to Social Security, retirement, and disability policy, especially focused on economically vulnerable populations. The fellowship includes UW-Madison salary and benefits, funding opportunities and structured mentoring for emerging scholars with an interest in applied research. Fellows will produce SSA style research papers and briefs, and have multiple opportunities to present their research. The goal of the fellowship program is to develop junior scholars who can become future leaders in the retirement and disability research fields. For more information and to apply, visit: https://cfsrdrc.wisc.edu/cfs-rdrc-postdoctoral-fellowship-program

Visit our website

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