

University of Wisconsin Retirement and Disability Research Consortium (RDRC)

FY 2025 Call for Proposals

The UW-RDRC is seeking research proposals for the Social Security Administration (SSA). Under a five-year cooperative agreement, SSA supports research project proposals consistent with the goal of balancing research that provides a foundation for policy analysis and those from seven focal areas, described below.

The UW-RDRC is currently accepting letters of interest and abstracts for investigator-driven applied RDRC research studies. Research projects will be awarded for the 2025 Federal Fiscal Year (September 30, 2024 to September 29, 2025). This is an applied research program designed to assist policymakers, the public, and the media in understanding Social Security, retirement, and disability policy issues across the life course. The UW-RDRC projects often focus on the impact of these issues on financially vulnerable populations.

Proposal Process

Letter of Interest: In order to be considered for funding, all potential proposals are required to submit a Letter of Interest (LOI) using [this submission link](#) by **Friday, April 19, 2024** and includes:

- Principal Investigator(s) and affiliations
- Project Title
- 1-page (max) project abstract including data sources and proposed approach
- Specific indication of SSA focal areas (see below) to be addressed
- Specific indication of project:
 - Policy relevance
 - Use of Mixed methods (if any)
 - Use of community-based/participatory research (if any)
 - Investigator Community Connections, and
 - Collaboration with non-R1/MSI Institutions (if any).
- Engagement with junior scholars, including those from the [JSIT program](#)
- Description of proposed uses for funding (salary, research assistants, data etc.)

Full Proposals:

If invited, **full proposals will be due on or before May 20, 2024**, using guidelines provided. SSA will make the final determination on projects are funded in the fall (typically in October).

Timeline

- April 19 Letter of Intent
- April 26 Invitations for Full Proposals
- May 20 Full Proposal Due

Research Topic Areas

We strongly encourage research proposals that draw from a variety of academic disciplines including (but not limited to) sociology, history, demography, public health, public policy and administration, economics, and psychology. Projects that use qualitative, quantitative, and/or mixed-methods approaches, including community-engaged research, and draw from or develop new data sources are encouraged. SSA encourages all researchers to consider equity—including the structural barriers that may contribute to disparate outcomes among people who have been historically underserved, marginalized, or adversely affected by persistent poverty—as they develop their proposals.

Proposals on topics that fall outside these focal areas may also be funded provided the proposal makes a strong case for why they are significant areas of research.

Focal Area 1: Understanding Service Needs and Improving Service Delivery

- *Improving service delivery to communities facing barriers:* What are the service needs of communities facing barriers (including Native American people and Tribal Nations, individuals with limited English proficiency (LEP), rural communities, LGBTQ+ persons, and people affected by persistent poverty, among others) and are there ways that SSA can improve our service delivery and outreach to these populations? How do service perceptions and outcomes for communities facing barriers compare with the rest of the population? We highly encourage qualitative and community-engaged research to address these topics, as well as learning from the best practices employed by other agencies and organizations. Specific questions of interest include:
 - What specific barriers do *Native American people and Tribal Nations* face when seeking SSA program benefits and interacting with the agency? What are best practices for partnering with Tribal Nations to increase access to SSA programs and service?
 - Millions of Americans speak a primary language other than English and/or have LEP. These populations may experience barriers in applying for benefits or finding required application documents. We would be interested in studies that explore the OASI, DI, and SSI applicant and beneficiary experiences of these individuals, including questions such as: *What are their experiences with SSA services (in-person, phone, and online)? Where do they get information about Social Security benefits? What advocacy groups or organizations do they rely on? How do they prefer to stay informed about the status of updates to their applications or benefits?*
 - To what extent does the language of application documents act as a barrier for individuals with LEP in completing disability applications in a timely manner? Do other documents create similar barriers for SSA program beneficiaries with LEP? What lessons may be learned from other agencies or organizations that serve populations with LEP?
 - What service-related barriers do *individuals living in rural areas* face when seeking government benefits, and how do these individuals prefer to communicate with government agencies when seeking benefits (e.g., online, by telephone, in-person). How do these service-related barriers and communication preferences vary by sociodemographic groups (e.g., race and ethnicity, educational attainment, age) within rural populations?

- What specific barriers do *LGBTQ+ and gender-diverse individuals* experience when applying for SSA programs or interacting with the agency as beneficiaries? What are best practices for reducing implicit bias when providing service?
- *1-800 number*: How does the 1-800 number service level affect barriers to accessing the agency’s programs and services? Can we quantify the consequences of the service quality on economic well-being and health either quantitatively or qualitatively? How does the 1-800 number service levels compare to other similar telephone assistance numbers? Are there inequities in who relies on the 1-800 number as a service channel compared to those coming into the office or using the agency website?
- *Customer experience and satisfaction*: How do service perceptions (e.g., satisfaction) and outcomes (e.g., wait times) vary by socioeconomic, regional, or demographic characteristics, such as race and ethnicity?
- *Differences in service delivery preferences*: How do preferences for different service delivery methods differ by birth cohort? Within birth cohorts, how do preferences differ by socio-economic characteristics and geographic location? Based on the findings, what are the potential implications for service delivery methods in the near, mid, and long-term future?
- *Service Disparities by Geographic Location*: What service-related barriers do individuals living in urban/rural areas face when seeking benefits?
- *Immigration and service needs*: SSA is interested in studies that explore how immigration patterns (e.g., number of immigrants, countries of origin) may affect the populations served by the programs administered by SSA, as well as future service needs.
- Any research that addresses Priority Question 1 in the [SSA’s learning agenda](#): “What are the effects of changes to our service delivery methods on the accessibility, use, efficiency, security, and equitable delivery of our services?”

Expanding Online Service

- The COVID-19 public health emergency and limited in-person services at our field offices made the agency acutely aware of the need to be able to conduct business virtually. We would be interested in research—including qualitative and community-engaged studies—that informs our efforts to expand service delivery options in all service channels, both domestically and abroad. Specific topics of interest include:
 - *my Social Security*: SSA seeks studies of the extent to which online *my Social Security* use is prevalent among populations with lower levels of internet literacy, education, and other barriers to digital access. What demographic (including race and ethnicity), socioeconomic, or regional characteristics are associated with the population who cannot successfully verify their identity to access Social Security’s online services through *my Social Security*? What is the effect of failing to authenticate using *my Social Security* on customers’ service perceptions (e.g., satisfaction)? What are the impacts of failure to establish a *my Social Security* account on outcomes, in particular time to complete a transaction?
 - *Improvements to my Social Security*: Are there features (offerings or services) that

SSA could consider adding to the *my Social Security* portal, particularly those that may benefit populations facing barriers (including SSI recipients)?

- *Online submission of forms and evidentiary documents:* To what extent would customers prefer to complete and submit forms necessary for the disability determination or redetermination process electronically or through a paper submission? Why do customers prefer electronic or mailed paper submission (e.g., convenience, security concerns related to personally identifiable information transmission, access to computers and technology, etc.)? Does this preference vary by demographic group or socioeconomic status? Would customers prefer using a secure portal (like *my Social Security*) to complete and submit forms and other required information and documents?
- *Text messaging:* Would utilizing text messaging to alert claimants to a variety of account updates, wait times, evidence needed, claim status, or post-entitlement reporting reminder be valuable to our beneficiaries? Would it provide users with greater confidence than phone calls, which may be viewed as scam attempts?
- *Testing methods to encourage online service use:* Based on the literature from behavioral economics/behavioral sciences, what are promising methods for encouraging use of online services or virtual service delivery platforms (video service delivery)? What approaches might be feasible for SSA to test via a pilot project or experiment?

Focal Area 2: Studying Causes and Inequities of Overpayment and Underpayment

- Identifying populations at risk of an overpayment or underpayment, especially those who depend on the benefits for most of their income.
- Identifying what factors affect overpayments and underpayments and barriers that may exist in resolving them in a way least burdensome to beneficiaries.
- *Impact of recovery from overpayments on beneficiaries:* Does recovering from overpayments result in financial hardship for our beneficiaries? Do beneficiaries understand what causes overpayments and why the agency tries to recover them? What do beneficiaries understand of the overpayment waiver and appeals processes and is there a barrier to accessing and meeting the requirements for SSA to waive an overpayment?
- *Assessment of reporting documents:* To assist our efforts to reduce overpayments, SSA would be interested in behavioral research that examines the written materials we send to beneficiaries with information on earnings reporting requirements. Are current written materials understandable to the general public? Are there ways to improve the clarity of these materials to improve beneficiaries' reporting of their earnings, resources, living arrangements, etc.?
- SSA would be interested in qualitative research on those who have experienced overpayments or underpayments, any barriers they encountered in being notified and resolving the situation, and feedback on their expectations and experiences that the agency can use to prevent improper payments and to better handle them when they occur.

Focal Area 3. Addressing Barriers to Disability and SSI Programs Participation and Processes

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.

Addressing Barriers to the Disability Process

- *Barriers in receiving a timely medical decision:* What are the characteristics of claimants who have the longest times for a disability claim to be resolved? What are the characteristics of claimants who require a consultative examination (CE)? Are they different in terms of impairments, adjudication path, legal representation, capacity to navigate the bureaucracy, or other potential social or structural inequities? SSA highly encourages research that can improve our understanding of who faces the longest time to receive a disability decision and what factors in those cases could be contributing to the lengthy processing times.
- *Disparities in program participation:* In comparison to the general population, which groups are disproportionately reporting living with an impairment? Which groups with an impairment are applying for SSI and/or SSDI? Which groups, if any, are disproportionately being denied? Which groups among those living with impairment in the general population are not applying for SSI and/or SSDI? What are the barriers or reasons for them not to apply? Are there any best practices in addressing these barriers?
- *Size of potentially eligible populations:* How many people do not apply although they could be eligible for Social Security or SSI benefits? What are their characteristics and reasons for not applying? Has this population grown over time, particularly since the COVID-19 pandemic?
- *Decline in applications, awards, rolls for SSI children:* What are the causes? Are there differences by subgroups? How do various policy options impact program effectiveness among the eligible population?
- *SSI program participation:* SSA is interested in how changes to SSI program design and public policy may encourage SSI program participation among eligible individuals. We are particularly interested in research that focuses on children eligible for SSI and individuals from communities facing barriers.
- *Program policy:* Research could consider how elements of SSI program design, such as the complexity of the SSI applications, may act as barriers to application. We encourage qualitative and community-based research in this area.
- *Public policy:* Research could also explore variation in SSI participation within and across states, in order to understand how state and local-level policies (including policies that vary by state) and other factors affect participation.
- *External barriers to application:* To what extent are there barriers and disparities in areas related to SSA's disability programs such as access to health providers, medical treatment, insurance coverage, third party assistance with applying for benefits, transportation, internet access, and community support, among others? What are the effects of these barriers and disparities on access to our disability programs? SSA encourages qualitative and community-engaged research

in this area, as well as approaches that consider the intersectionality between disability status, race, and ethnicity.

- *Impact of incarceration:* According to past studies, individuals who are incarcerated are three to four times more likely to report a disability than the general population. SSA has an interest in learning more about this population and how they are participating in our programs (if at all) once they are no longer incarcerated. Do their periods of incarceration impact their eligibility and participation in our programs? SSA has agreements to take applications for replacement SSN cards needed for employment post-incarceration. In what other ways can SSA support this transition?
- *Using cross-program data to identify the eligible population:* Some people are eligible for multiple government programs. SSA is interested in research that estimates the effects of improving coordination across public programs (e.g., housing assistance, Supplemental Nutrition Assistance Program, Temporary Assistance for Needy Families, unemployment insurance) on increasing program participation in SSA administered programs (e.g., SSI, DI), and vice versa.⁴
- *Learning from current outreach efforts:* Are there successful outreach efforts to potential Social Security or SSI beneficiaries—e.g., children/youth with disabilities not receiving SSI who may be eligible, minor children who may be eligible for child benefits, widow(er)s and minor children who may be eligible for survivor benefits, etc.—that SSA can learn from to improve its own efforts to encourage program participation? What is the potential missed population and are there evidence-supported models or approaches to improve our outreach efforts? How can this inform future SSA demonstrations?

Addressing Barriers for Program Applicants and Beneficiaries

- *Barriers to completing disability applications:* What are the characteristics of individuals who file an initial disability application, but do not complete the medical portion of the process? What specific barriers do these individuals face in completing the application or process (e.g., difficulties completing documentation, receiving service, transportation, and other factors)? SSA encourages qualitative and community-engaged research to identify these barriers. We are particularly interested in research that focuses on children eligible for SSI and individuals from communities facing barriers.
- *Barriers in the disability hearings process:* What are the characteristics of claimants who drop out after the initial medical denial and do not pursue reconsideration or hearings? Are they different in terms of legal representation, capacity to navigate the bureaucracy, or other potential social or structural inequities? SSA highly encourages research identifying the specific barriers people face when deciding whether to pursue a disability hearing, as well as the barriers they face when preparing for a hearing.
- *Simplifying documentation requirements:* What are successful models of benefit program administration outside the SSA context that balance the burden of proof with administrative flexibility and minimal burdens on customers? Research could examine how other programs at the federal, state, local, and non-profit levels handle documentation and how they have adjusted to pandemic restrictions.
- *Access to legal representation:* What barriers do underserved applicants face in obtaining legal

representation during initial disability applications and appeals? What is the value of representation at different stages of the disability application and appeals processes? SSA is particularly interested in research focusing on SSI applicants. We are interested in a variety of research methods (e.g., qualitative, community-engaged, and quantitative) to address these questions.

- *Access to medical evidence*: What factors (e.g., case or impairment type, sociodemographic characteristics including geographic location, healthcare access) limit available medical evidence of record (MER)? Do outcomes of claims differ when the consultative examination (CE) provider is the claimant's own medical source, an independent practitioner, or an employee of a contracted CE-providing company?
- *Telephonic appearances at hearings*: How effective are the telephonic appearances that the agency implemented in response to the COVID-19 public health emergency relative to the in-person and video appearances before the COVID-19 public health emergency? For example, are hearings timely, accessible, and satisfactory when the claimant appears by telephone? Does take-up vary by demographic, socioeconomic, or regional characteristics? Are outcomes affected by manner of appearance (in person, telephonic, or video)?
- *Decline in the number of SSI child recipients*: SSA is interested in research that identifies causes for the notable decline in the SSI child recipient population, including a decline in the application rate and an increase in medical cessation rates.

Focal Area 4: Understanding and Improving Communication

- See <https://www.socialsecurity.gov/ssi/text-notice-ussi.htm>
- *Outreach to communities facing barriers*: SSA is highly interested in research that will help improve outreach to communities facing barriers. Research could consider what these populations know about our programs, how they acquire knowledge, whether SSA communication and outreach efforts are reaching them, ways to improve communication and outreach efforts (e.g., by identifying trusted partners for different racial/ethnic groups), ways to improve knowledge/trust among these populations, etc. SSA encourages qualitative and community-engaged research in this area. For individuals living in urban/rural areas, how do these individuals prefer to communicate with government agencies (e.g., online, by telephone, in-person) when seeking benefits? How do communication preferences and these service-related barriers vary by sociodemographic groups (e.g., race and ethnicity, educational attainment, and age)?
- *Social Security Statement and supplemental fact sheets*: Has SSA's introduction of new supplemental fact sheets that accompany the redesigned *Social Security Statement* influenced worker behavior or increased their program knowledge? How have SSA's changes to the *Statement* affected understanding of the claiming decision and other aspects of the program? Do workers with non-covered earnings, who receive a special *Statement* and supplemental fact

sheet, have a better understanding of the impact a non-covered pension can have on their Social Security benefits?

- *Agency notices*: SSA is interested in studies that evaluate the effectiveness and readability of agency notices. Questions could include: Is the notice in plain language? Is it easy to read and understand? How many times did the reader need to read the notice to clearly understand what was being explained or requested? Did the reader call our 1-800 number or reach out to Social Security for additional information/explanation? Did the reader need to have a friend or relative help them understand the notice? Does the reader have any recommendations on how to simplify these notices?
- *Communication preferences during disability application*: To what extent would customers applying for disability benefits prefer agency communication (e.g., requests for forms completion, reminders to return forms or attend a consultative examination) by email, text, my Social Security Message Center, or U.S. mail? Why do customers prefer a certain method, and does this preference vary by demographic group or socioeconomic status? If so, why? Do different communities face different barriers with some types of communication?
- *Social Security fraud/scams*: We continue to encourage research on the impact of Social Security scams on our beneficiaries, how the impact varies by demographic group (particularly among persons of color and other historically underserved groups), and ways to reduce fraud and improve trust among the public.
- *COVID-19 SSI outreach*: What is the impact of SSA's COVID-19 SSI outreach initiatives? What metrics can determine effectiveness? Does outreach effectiveness vary by demographic, socioeconomic, or regional characteristics? Does it vary by communication channel (i.e., direct mail, TV, radio ads, or third-party initiatives)?
- *Testing potential changes in communication*: Changing the way the agency communicates with the public can help people make more informed decisions. A paper by USC and SSA researchers shows that changing terms like "early retirement age" to "minimum benefit age" helps people obtain a better understanding of the program and adjust behavior accordingly. We are interested in developing evidence on other changes to the way we communicate with the public on outcomes such as gaining a better understanding of features of our program, customer behavior, customer satisfaction, administrative efficiency, and program integrity.

Focal Area 5. Identifying Disparities by Race, Ethnicity, and Sex

- *Disparities in disability allowances*: For the DI and SSI programs, how do barriers to access and variations in allowances relate to race, ethnicity, and sex? In particular, is there evidence of systematic differences in allowances for the DI or SSI programs? If so, what are the sources of the differences and what are the consequences on the applicant's economic productivity and welfare?
- *Disparities in the SSI program*: Are there systematic differences by race, ethnicity, and sex in who applies for SSI? Are there disparities for program participants, such as differences in over- or under-payment rates or duration of benefits? Specifically, are there

disparities for babies whose low birth weight would qualify them for SSI and who financially qualify for SSI either due to household income and resources or due to residence in a medical treatment facility (see <https://secure.ssa.gov/poms.nsf/lnx/0500520011> C.1 Example 1)?

- *Disparities in continuing disability reviews*: Do medical and work continuing disability reviews vary by race, ethnicity, and sex in terms of scheduling, occurrence, and benefit disposition at initial decision and appeal (benefit continuation, cessation for medical improvement, and termination for failure to cooperate)?
- *Disparities in retirement security*: SSA encourages research that explores the historical inequities and structural barriers that contribute to disparate levels of economic security in retirement for racial and ethnic minorities and for women. We are interested in supporting projects from diverse academic fields (e.g., history, sociology, economics) and methodological approaches.
- *Disparities in retirement preparedness*: SSA also encourages research that explores disparities in retirement preparedness by race, ethnicity, sex, and socioeconomic characteristics. We are particularly interested in studies that identify specific, structural barriers to retirement preparation and that present suggestions for addressing these barriers and reducing disparities.
- *Structural barriers in the labor market*: SSA is interested in studies focusing on identifying and addressing structural barriers in the labor market experienced by racial and ethnic minority individuals and women. We are specifically interested in understanding how these barriers relate to disparities in economic well-being among working and retired individuals.
- *Caretaking*: What impact has the pandemic had on the economic security of workers who provide care to other family members, including but not limited to elders, and how will these impacts affect the caregivers' retirement security? What impact have conditions such as dementia had on the economic security of caregivers?
- *Estimating disparities*: SSA is interested in projects that highlight best research practices to investigate the effect of structural determinants on economic and other disparities by race, ethnicity, and sex within quantitative models (e.g., regressions, effect decompositions). We are interested in how state-of-the-art methods and data sources may be incorporated into this research. We also continue to be interested in best practices for incorporating control variables into quantitative models in a way that does not result in biased estimates of these disparities.

Focal Area 6: Examining Economic Security of Program Applicants and Beneficiaries

- *Social Security's role in economic security*: How important is Social Security and SSI income relative to broader income sources and how does this vary across racial/ethnic and other demographic groups? How much does Social Security and SSI change disparities in income, health, and well-being? Have those effects changed over time?
- *Unmet needs*: SSI and SSDI help to raise many beneficiaries out of poverty, but many unmet needs remain. Are there differences in need by demographic groups? How do other programs help to meet those needs? How can changes to SSA programs better meet these needs?

- *Survey income reporting*: Some research suggests that individuals responding to surveys have tended to underreport assets and income, leading to incorrect conclusions about the poverty levels of Social Security beneficiaries and the share of income received from Social Security benefits. SSA is interested in additional research on this topic, including projects that use innovative matched datasets. We are also interested in research that incorporates a variety of methods to help better understand why people underreport assets and income, as well as research that tests ways to encourage more accurate reporting.
- SA is also interested in studies that explore how specific OASDI and SSI policies and program provisions affect the economic security of beneficiaries. Specific areas of interest include:
 - *SSI program and resource limits*: For SSI, what program changes would have the greatest impact in terms of poverty reduction? How might changes affect different subgroups? In particular, how do asset limits under needs-based programs (including, but not necessarily limited to, SSI) affect the economic security of beneficiaries? How would increasing the current income and asset limits (or changing the way SSA considers income and in-kind support and maintenance) affect SSI recipients? Modeling distributional effects may be a useful strategy here.
 - *Use of Achieving a Better Life Experience (ABLE) accounts among SSI recipients*: We are interested in studies examining the use (or non-use) of ABLE accounts to improve the economic security of SSI recipients. What are the contributing factors determining the use of ABLE accounts? Do potential ABLE account holders know about ABLE accounts? How do users find out about accounts? Are there barriers preventing SSI recipients from opening an ABLE account (or from contributing to one if they are already account holders)?
 - *Impact of waiting periods for SSDI beneficiaries*: What are the impacts (health care, income, financial status) of the 24-month Medicare waiting period and the 5-month waiting period for benefit entitlement on SSDI beneficiaries? Are certain population groups able to sustain themselves better than others during this period?⁷ What would be the impacts, advantages/disadvantages, and costs of reducing or eliminating these waiting periods?
 - *OASDI program provisions*: Projects that examine how OASDI program provisions affect economic outcomes, including: How might alternative inflation indices for cost-of-living adjustments (COLAs), such as the CPI-E or chained CPI-U, affect beneficiary wellbeing and economic activity? How do the size and timing of COLAs affect eligibility for means- tested programs such as Medicare savings programs? How do COLAs impact beneficiaries' taxes on Social Security benefits and surcharges for Medicare Parts B and D?
 - *Multigenerational families or other households*: Different racial/ethnic groups rely on multigenerational support systems in different ways. In addition, the make-up of a person's household could impact SSI benefit payments. How could Social Security's benefit structure—for example, eligibility rules for child benefits—or SSI payment

determinations be modified to account for these differences?

- *Making ends meet while waiting for disability benefits and after being denied:* How do individuals cope economically during the time they are waiting for a disability hearing or are re-applying for benefits or after being denied benefits? How does economic well-being vary by socioeconomic characteristics (e.g., race/ethnicity, sex, household composition)? In particular, how do single adults cope? (For instance, do they move in with a parent? Cohabitate with someone else?) SSA is interested in diverse methodological approaches (e.g., qualitative, community-based, and quantitative) to addressing these questions. We are also interested in studies that explore the intersectionality between race, ethnicity, and sex.

Impact of COVID-19 and long COVID

- What impact has the COVID-19 pandemic and long COVID had on the economic security of older workers and Social Security beneficiaries, particularly populations eligible for and/or receiving SSI? Does the impact vary by race, ethnicity, disability status, or other individual factors? We are particularly interested in studies focusing on lower-wage workers.
- How might long COVID affect individuals' earnings in the future and how might this in turn affect their retirement security and Social Security benefits? On a broader level, what are the effects of long COVID on the SSDI and SSI programs, including classification and determinations, application volume, program costs, and returning to work? We welcome studies that may help SSA to mitigate challenges posed by long COVID. We would also be interested in studies that review how other government agencies are addressing long COVID.
- How have post-pandemic health conditions changed? Are there particular medical conditions that are more prevalent post-pandemic (e.g., long-COVID, respiratory conditions, cardiac conditions, etc.)? Has there been a change in health status of individuals with chronic conditions who experienced a lapse in care due to the pandemic? If health status was negatively impacted, has their health rebounded?
- What impact did the COVID-related measures (e.g., economic impact payments and extended unemployment insurance) have on economic security and claiming behaviors? Did these measures reduce applications for retirement or disability benefits in the short term, and are we seeing increases now?
- What impact did the changing nature of work during COVID – particularly the shift to telework and more flexible work arrangements – have on labor force participation and retirement or disability claiming?

Focal Area 7: Addressing Employment Barriers for People with Disabilities

- To what extent do employers discriminate against people with disabilities? Does discrimination vary by impairment type, age, race/ethnicity, gender, location, etc.? How do different types of discrimination affect people with disabilities?
- Are there strategies from other federal and state agencies that successfully reduce employment

discrimination? Can those be replicated by SSA or is there a way of coordinating efforts?

- Are there strategies from other federal and state needs-based assistance programs for work reporting and applying earnings in eligibility assessments that contribute to fewer improper payments?
- What are the best practices of disability-friendly employers?
- What impact do employment conditions and employer incentives (e.g., quality affordable health insurance, substantial paid leave, and work flexibilities) have on the likelihood that workers with a recent illness or injury stay at work or rapidly return to work? How does this vary across industries, occupations, and individual employers? Are there differences in the prevalence of work-limiting illnesses and injuries for workers in more conducive employment situations compared with less conducive situations (e.g., workers lacking quality affordable health insurance, paid leave, or skill-levels that result in strong employer incentive to retain workers)?
- What impact does the lack of (accessible and non-accessible) transportation (public or private) have on the labor force participation of individuals with disabilities in regard to their staying at work or returning to work? How does this vary across locales, e.g., rural areas vs urban areas or small towns vs large metropolitan cities? Does ensuring the availability of accessible transportation or transportation in general increase the number of individuals and levels of employment for individuals with disabilities
- How well do SSDI beneficiaries understand SSA's work incentive rules and the effect working above the Substantial Gainful Activity (SGA) limits has on their benefits? What do employers understand or misunderstand about SSA's work incentives and related policies. For example, do employers understand what SSA means by "subsidy" or "subsidizing earnings"?
- What practices and models for providing services or removing barriers to employment are effective for different subsets of the population?
- To what extent can the data generated by prior SSA demonstrations be used to substantially expand the knowledge generated from them? Potential topics include, but are not limited to, studies assessing structural barriers, alternative evaluation methods (e.g., Bayesian analyses), and longer-term follow-up analyses.
- How does benefits counseling impact work and earnings? What online tools (e.g., benefit calculators) or other software do benefits counselors use to help beneficiaries make informed employment decisions? How effective are different tools or different types of tools?
- What can we learn from the National Beneficiary Survey (NBS) successful worker sample about beneficiaries' employment experiences? How do these experiences differ by beneficiaries' characteristics?
- During and following the COVID-19 pandemic, has the return-to-work response been uniform or are people with certain conditions more likely to remain working than others?
- What are the Medicare expenditures of SSDI beneficiaries who return to work in the 93 months of continued Medicare coverage after the Trial Work Period? For how many such beneficiaries is Medicare the second payer for medical expenses? How does this affect their work patterns?

- What is the estimated impact of the federal Work Opportunity Tax Credit (WOTC) and/or similar state-level tax credits on the employment, retention, and earnings of people with disabilities? Which employers (industries, occupations) utilize WOTC, and which do not? Do SSI recipients and Ticket users whose employers claim WOTC have better or worse outcomes than those whose employers do not? If so, why?
- Has the COVID pandemic affected the difference in services provided and utilized among local and national Employment Networks?
- What are the patterns of health care coverage among individuals who exit the DI program after returning to work?
- To what extent are DI and SSI beneficiaries able to adapt to their health conditions by using technological innovations in vision, aural, prosthetics areas? To what extent are such devices successful in helping beneficiaries with disabilities return to work?
- What are the characteristics of terminated DI beneficiaries that subsequently have benefits reinstated or apply for benefits again? A portion of people whose DI benefits are terminated for work or medical improvement end up returning as SSI recipients; similarly, some terminated DI- only beneficiaries become concurrently eligible for SSI when they return to the benefit rolls. What are the demographic characteristics and outcomes of these groups? How do they compare to DI beneficiaries whose benefits were suspended or terminated for other reasons?
- What has been the impact of recent increases in the minimum wage on Substantial Gainful Activity (SGA)? Increases in the minimum wage have affected how many hours someone needs to work to reach SGA. What does that mean for claimants, beneficiaries, recipients, employers, and SSA?

All research proposals should in some manner address these issues: (1) Racial equity and support for communities facing barriers (2) how the COVID-19 pandemic impacts SSA programs and populations, including long-COVID.

For more background on SSA, see [Fast Facts and Figures About Social Security, 2023 \(ssa.gov\)](https://www.ssa.gov/pressroom/factsheets/2023/01/20230123-fast-facts-and-figures-about-social-security).

SSA Scoring Rubric

Project scoring is based on 11 areas. The points and criteria are below.

Area	Criteria	Full Points
Scientific Significance	How will successful completion of the aims change the concepts, methods, technologies, treatments, services, or interventions that drive this field?	5
Practicality/Policy relevance	Does the research lend itself to practical applications and is it related to the agency's focal areas?	5
Approach/Methodology	Is the methodology, and analyses well-reasoned and appropriate to accomplish the specific aims of the project? Are potential problems, alternative strategies, and benchmarks for success discussed?	5
Mixed Methods	Does the project utilize mixed methods and are they integrated to inform one another?	5
Community-based participatory research	Is CBPR comprehensive and integral to designing, conducting the research, and interpreting findings?	5
Timeliness	Does the project appear very likely to be completed on time and addresses any risky aspects?	5
Investigator Research Qualifications	Are the PIs, collaborators, and other researchers well suited to the project? Does the project include researchers new to the RDRC, junior researchers or others who can bring different methodological expertise, new subject matter expertise, lived experience, new perspectives, or other unique contributions?	5
Investigator Community Connections	Do investigators have strong connections to the communities being studied and they will benefit the research project?	5
Investigator Institution	Are the investigators from an HBCU or ISSC? (see here)	5
Data Quality	Are data needs are described in such a way that a reviewer is left with no concerns about data quality?	5
Data Availability	Do the investigators have continuing access and have addressed contingencies if availability is threatened?	5
Total		55

UW-RDRC Full Proposal Specifications (more details provided after the LOI review)

Proposals should be written in Microsoft Word and double-spaced using headers for each of the sections below. *Proposals may not exceed 6 pages, double-spaced, not including budget template or references using Times Roman 12 point font.*

- Title
- PI & Co-PIs and Bios (100 words per bio)
- Focal Area(s) addressed
- Keywords (3-5)
- Abstract (150 words)
- Data Sources
- Significance
- Methods
- Community Engagement & Translational Dissemination Plan
- Training Plan for Students/Junior Scholars
- Complementarity or Overlap with Other Funding Statement
- Timeline (Table)
- Budget & Budget Narrative (using spreadsheet provided)