

BOND Implementation and Evaluation

2015 Stage 2 Interim Process, Participation, and Impact Report

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Background

- ▶ The Benefit Offset National Demonstration (BOND) is a random assignment test of changes to Social Security Disability Insurance (SSDI) program rules governing work and other supports. BOND incorporates a \$1-for-\$2 benefit offset allowing beneficiaries to retain more of their monthly cash benefit while working. BOND is also testing enhanced benefits counseling.
- ▶ BOND includes two stages. Stage 1 provides evidence of how a national benefit offset would affect earnings and program outcomes for the entire SSDI population. Stage 2 provides evidence of the effects on beneficiaries most likely to use the offset (recruited and informed volunteers). Stage 1 includes 981,145 beneficiaries; Stage 2 includes 12,744 beneficiaries.
- ▶ This report documents results of the Stage 2 process and participation analyses through the fourth calendar year of implementation (2014) and documents the effects on earnings and benefits during the third calendar year of implementation (2013).

Main Findings

- ▶ The offset **did not** produce a detectable change in earnings.
- ▶ The offset **did not** produce a detectable change in benefits paid.

Additional Findings

- ▶ The offset increased the proportion of beneficiaries with earnings above the level at which they become eligible for the offset.
- ▶ The offset increased the number of months of SSDI receipt.
- ▶ About 10 percent of Stage 2 beneficiaries have used at least one month of offset.
- ▶ There is no difference in the outcomes between the study group receiving enhanced benefits counseling and the study group receiving traditional benefits counseling.

Summary

- ▶ As of the third calendar year of implementation (2013), we have not seen overall increases in earnings or reductions in SSDI benefits paid.
- ▶ Beneficiaries still have several years to take advantage of the offset, and we will continue to track whether outcomes are different in future years and cumulatively. However, since Stage 2 is composed of volunteers, the relatively low use of the offset at this time could indicate future results will not be much different from those in the current report.



Learn more at
www.socialsecurity.gov/disabilityresearch/offsetnational.htm

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