

BOND Implementation and Evaluation

2016 Stage 1 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 1 earnings and benefit analyses through the fourth calendar year of implementation (2014), process and participation analyses for 2015, and an overpayments analysis from 2011 to 2013.

Main Findings

- ▶ The offset **did not** produce detectable changes in earnings for 2014.
- ▶ The offset caused average benefit payments to increase by \$132 in 2014.

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 beneficiaries employed in 2014.
- ▶ The offset increased the number of months of SSDI receipt.
- ▶ The offset reduced the size of overpayments.

Summary

- ▶ As of the fourth calendar year of implementation (2014), we have seen overall increases in SSDI benefit payments, but no increases in earnings.
- ▶ Beneficiaries still have several years to take advantage of the offset, and we will continue to track whether outcomes are different in future years. However, since Stage 1 is composed of a large group of non-volunteer beneficiaries, 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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