

Getting a Job, Keeping a Job: Services and Supports That Promote Employment Among People with Disabilities

**Presenters: Arif Mamun and Noelle Denny-Brown, Mathematica
Policy Research, and John O'Neill, Kessler Foundation**

Discussant: David Wittenburg, Mathematica Policy Research

Washington, DC

September 17, 2014



Welcome



Moderator

Yonatan Ben-Shalom

Mathematica Policy Research

About the Center for Studying Disability Policy

The Center for Studying Disability Policy (CSDP) was established by Mathematica Policy Research in 2007 to provide the nation's leaders with the data they need to shape disability policy and programs that fully meet the needs of all Americans with disabilities.

Today's Speakers



Arif Mamun
Mathematica



Noelle Denny-Brown
Mathematica



John O'Neill
Kessler Foundation



Discussant:
David Wittenburg
Mathematica

Return-to-Work Outcomes Among Social Security Disability Insurance (DI) Beneficiaries

Yonatan Ben-Shalom • Arif Mamun

**Presented at the CSDP Forum
Washington, DC**

September 17, 2014



Acknowledgments

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- **The opinions and conclusions expressed are solely those of the authors and do not represent the opinions or policy of NIDRR or any agency of the federal government**

Motivation

- **Policymakers are interested in promoting employment among DI beneficiaries**
- **Targeting specific groups of DI beneficiaries is likely of interest**
 - **Recent initiatives targeted to specific groups include the Mental Health Treatment Study, Accelerated Benefits, YTD, and PROMISE**
- **Policymakers need more information on what factors are associated with return-to-work**

Research Question

- **How are beneficiary characteristics and local economic conditions associated with return-to-work outcomes?**
- **We specifically focus on**
 - **Age and impairment type**
 - **State economies and other state-level effects**
 - **Timing of award**
- **We present a long-term view of what factors influence outcomes among DI beneficiaries**
 - **Five years after DI award**
 - **Most beneficiaries who return to work do so within five years**

Data Sources

- **Administrative records from**
 - **Social Security Administration (SSA)**
 - **Rehabilitation Services Administration (RSA)**
- **Data from SSA and RSA matched at the individual level**
- **Monthly state unemployment rates from the Bureau of Labor Statistics**

Study Population and Study Period

- **New working-age DI awardees from January 1996 to December 2004**
- **Analysis sample excluded beneficiaries who died or reached age 65 within five years of award**

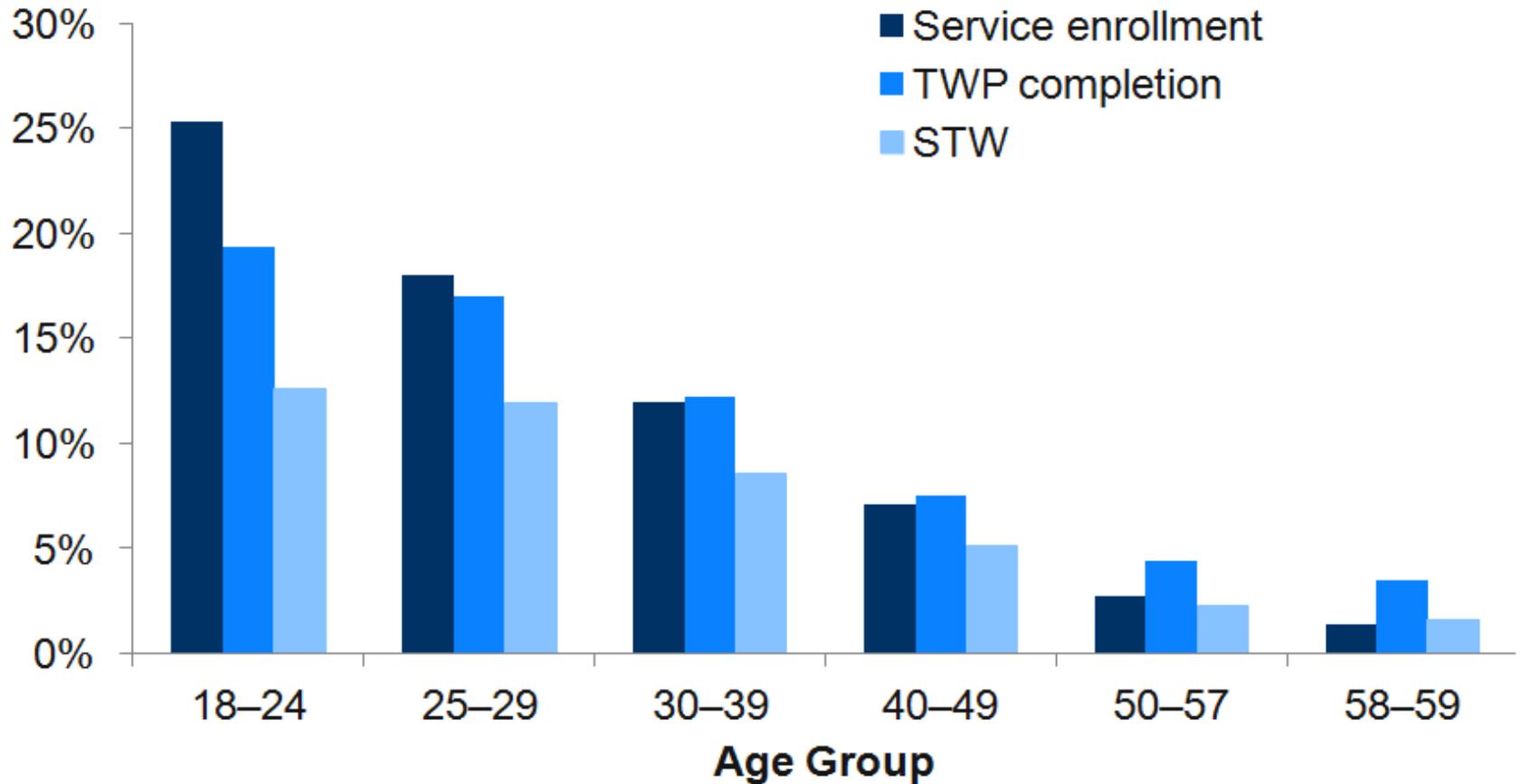
Outcomes: Return-to-Work Milestones in Five Years Following DI Award

- **Service enrollment**
 - Enrollment in services from state vocational rehabilitation agency (SVRA) or employment network (EN)
- **Trial work period (TWP) completion**
- **Suspension or termination due to work (STW)**

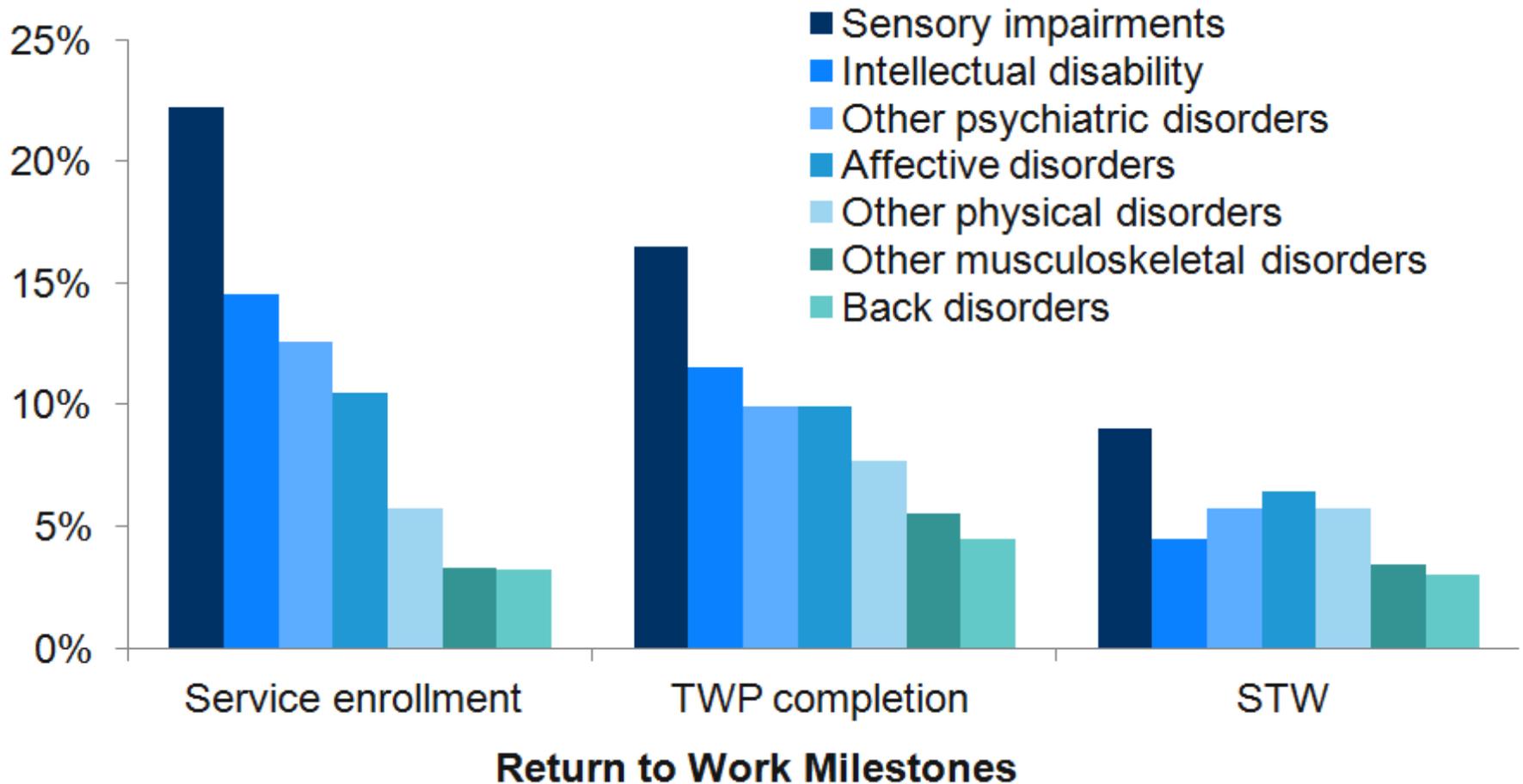
Test Your Knowledge

- **Which DI award cohort had better 5-year return to work outcomes?**
 - a) 1996, when the economy was expanding**
 - b) 2000, at a peak of economic expansion**

Share of New DI Awardees (1996–2004) Achieving Milestones Declines with Age



Share of New DI Awardees (1996–2004) Achieving Milestones Varied by Impairment



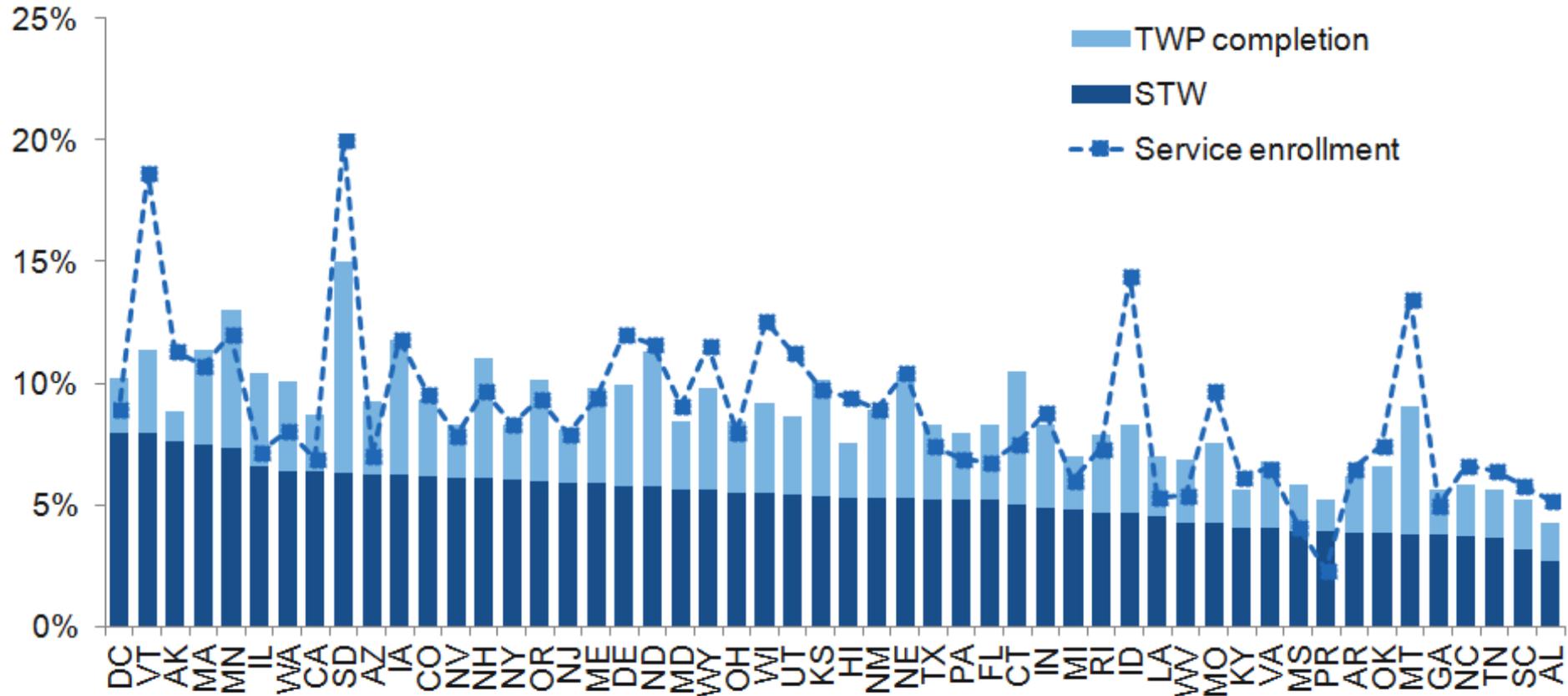
Multivariate Analysis

- **Differences in outcomes across impairment groups might be driven by differences in age distribution of beneficiaries across impairment groups, and vice versa**
- **To account for this, we conduct multivariate analyses**
- **We control for individual characteristics, programmatic features (including DI award month), and state effects**

Likelihood of Achieving Milestones

- **Likelihood of achieving milestones increases with**
 - **Sensory impairments**
 - **Being black**
 - **Years of education**
 - **DI award at initial adjudication level**
- **Likelihood of achieving milestones decreases with**
 - **Age**
 - **Back and other musculoskeletal disorders**
 - **Monthly DI benefit**
 - **Receipt of SSI benefits**
 - **Medicare eligibility at award**
 - **Disabled adult child status**
 - **Increase in state unemployment rate**

Large Variation Exists in Return-to-Work Outcomes by State of Residence

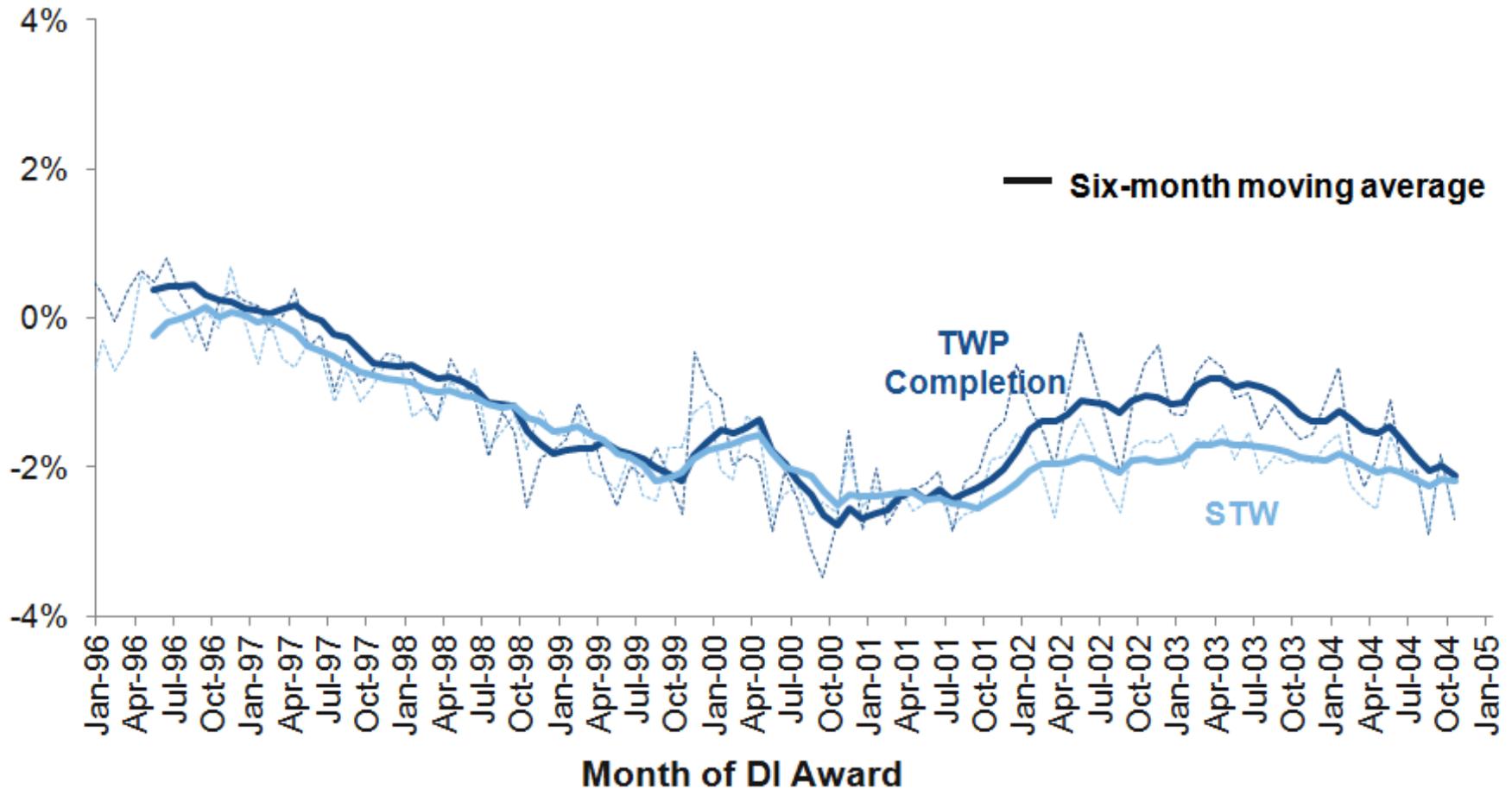


Note: States are ordered from largest to smallest effects in STW regression

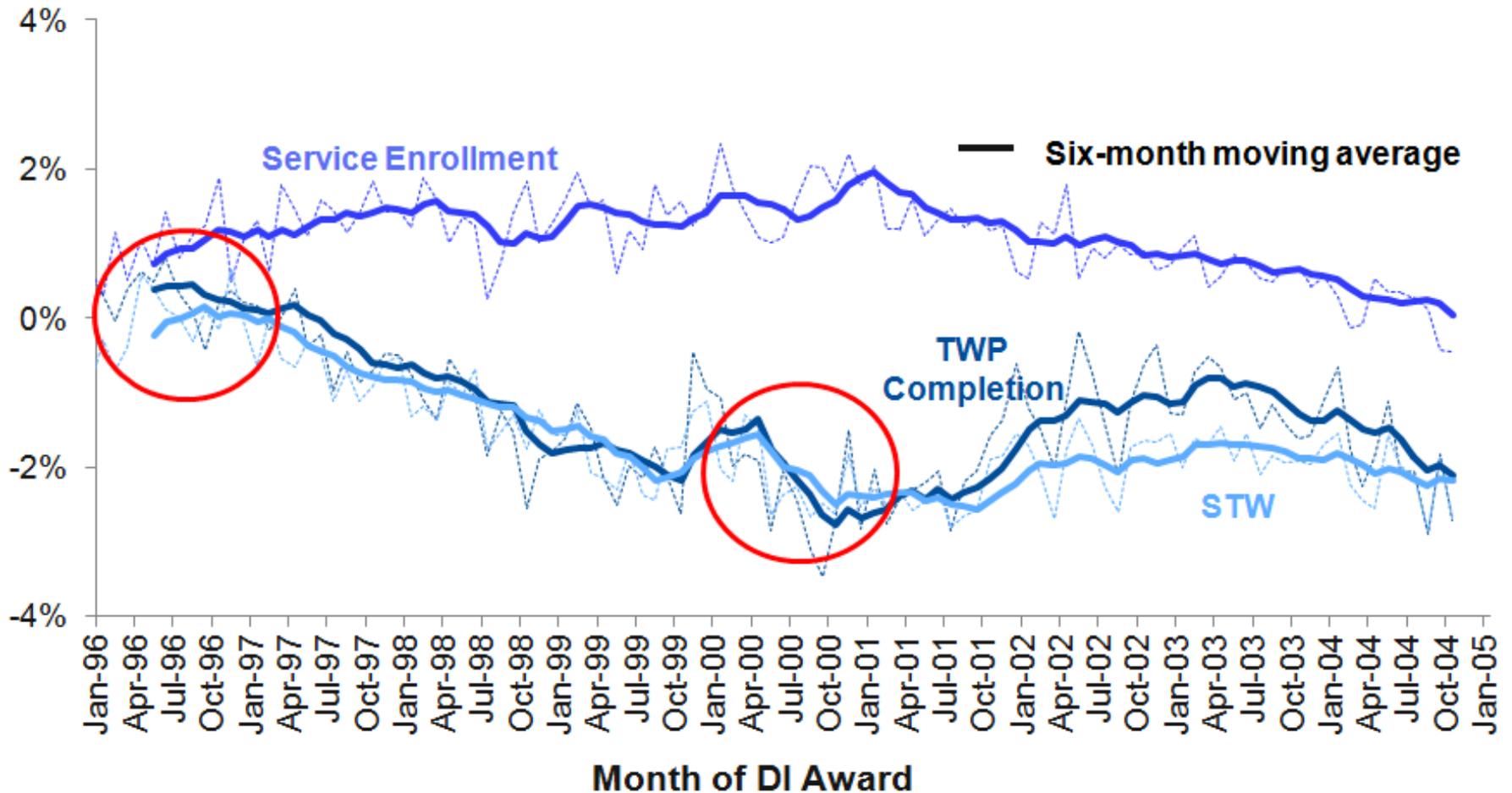
DI Award Month and Return-to-Work Outcomes

- **Award month captures unobserved factors affecting behavior among beneficiaries who enter DI at different points in time**
 - **Changes in policy over time**
 - **Changes in the composition of new awardees in terms of unobserved characteristics**
- **Recall that we account for beneficiary characteristics, state economy, and other fixed state conditions**

Economic-Expansion-Period Awardees Seem Progressively Less Likely to Achieve Milestones



Award-month influenced service enrollment differently than other milestones



Conclusions

- **Younger beneficiaries substantially more likely to achieve return-to-work milestones**
- **Beneficiaries with sensory impairments have highest likelihood of achieving all milestones; those with back and other musculoskeletal disorders show the lowest two likelihoods**
- **Differences across age and impairment persist after accounting for other characteristics**
- **Large variation in the relationship between state of residence and return-to-work outcomes**
- **Timing of award may be capturing unobserved beneficiary characteristics**

Policy Issues

- **Should SSA direct efforts to help beneficiaries return to work toward recent awardees under age 40?**
- **Should return-to-work initiatives be tailored according to impairment type?**
- **Should efforts to slow entry via early intervention focus on those most likely to achieve the return-to-work milestones under current law?**
- **What factors explain variation across states and time?**

For More Information

- Please contact
 - Arif Mamun
 - amamun@mathematica-mpr.com
 - Yonatan Ben-Shalom
 - yben-shalom@mathematica-mpr.com

The Effectiveness of Services Provided to SSDI Beneficiaries by State Vocational Rehabilitation Agencies

**John O'Neill, Arif Mamun, Liz Potamites,
Fong Chan, and Elizabeth Cardoso**

**Mathematica Policy Research CSDP Forum
September 17, 2014**

Funding and Disclaimer

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- **The contents of this paper do not necessarily represent the policy of the Department of Education or any other federal agency (Edgar, 75.620 [b]); the authors are solely responsible for all views expressed**

Motivation

- **Several studies have suggested that state vocational rehabilitation agency (SVRA) services can improve employment outcomes among SSDI beneficiaries**
- **However, there have not been any well-controlled national-level tests of the influence of SVRA services on return-to-work effort among SSDI beneficiaries**

Purpose of Study

- **To examine the influence of SVRA services at the national level on the likelihood of SSDI beneficiaries returning to work**
- **The study uses a research methodology that controls for extraneous factors by closely matching DI beneficiaries who don't apply for SVRA services to those who do apply**

Test Your Knowledge

- **How likely are beneficiaries who receive SVRA services to leave the SSDI program due to employment compared to the matched comparison group?**
 - a) Equally likely**
 - b) 4 percentage points more likely**
 - c) 8 percentage points more likely**

Methodology: Data

- **We used data from two administrative sources**
 - **Social Security Administration’s Disability Analysis File (DAF)**
 - **Rehabilitation Services Administration’s 911 files (RSA 911)**
- **Data from these two administrative files were matched to create an individual record for each SSDI beneficiary**

Methodology: Data

- **For our analyses, SSDI-only beneficiaries were drawn from the merged administrative data files**
- **We created the base population using individuals who were between ages 25 and 54, who were awarded benefits for the first time in 2000, and who did not die before 2010**

Methodology: Data

From the base population, we created three groups

- 1. A comparison population of SSDI-only beneficiaries who had never had a closure from SVRA services between fiscal years 1997 and 2010**

Methodology: Data

- 2. An applicant group that included new SSDI-only awardees from 2000**
 - Who applied for SVRA services in fiscal year 1997 or later**
 - Who were closed from SVRA services after an individual plan for employment had been developed**
 - Who applied for SVRA services within five years of their SSDI award**
 - Whose time from first SVRA application to last SVRA closure was less than five years**

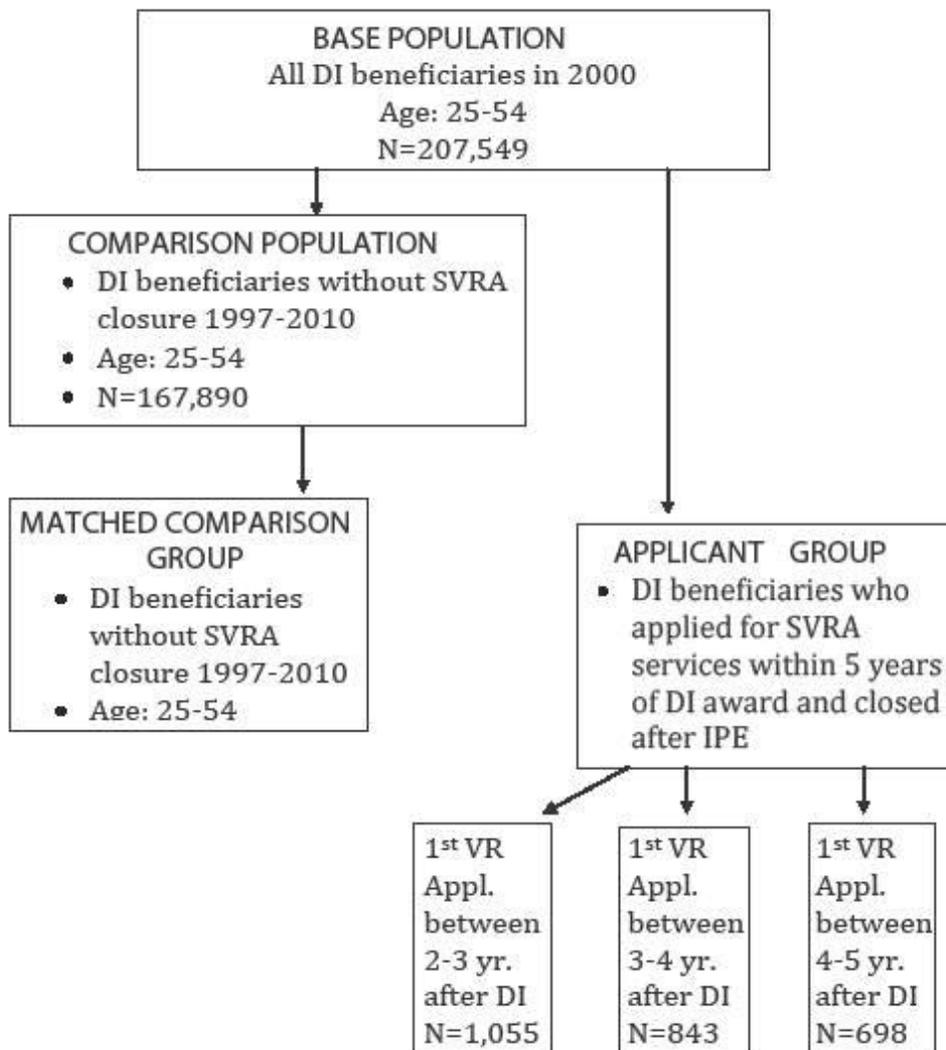
Methodology: Data

- **The applicant group was further divided into three subgroups who had applied for SVRA services at different times**
 - **From two and three years following SSDI award**
 - **From three and four years following SSDI award**
 - **From four and five years following SSDI award**

Methodology: Data

- 3. A matched-comparison group of SSDI-only beneficiaries who had never had a closure from SVRA services from fiscal years 1997 and 2010**
 - Propensity score matching procedures were used to create this group, which was statistically equivalent to the applicant group on 34 of 36 observed beneficiary characteristics at the time of SSDI award**
 - Matching variables included gender, age, race/ethnicity, highest grade completed, impairment type, SSA application appeal factors, whether beneficiary received Ticket, average indexed monthly earnings, and average benefit amount**

Flow Diagram for the Analysis Sample



Methodology (continued)

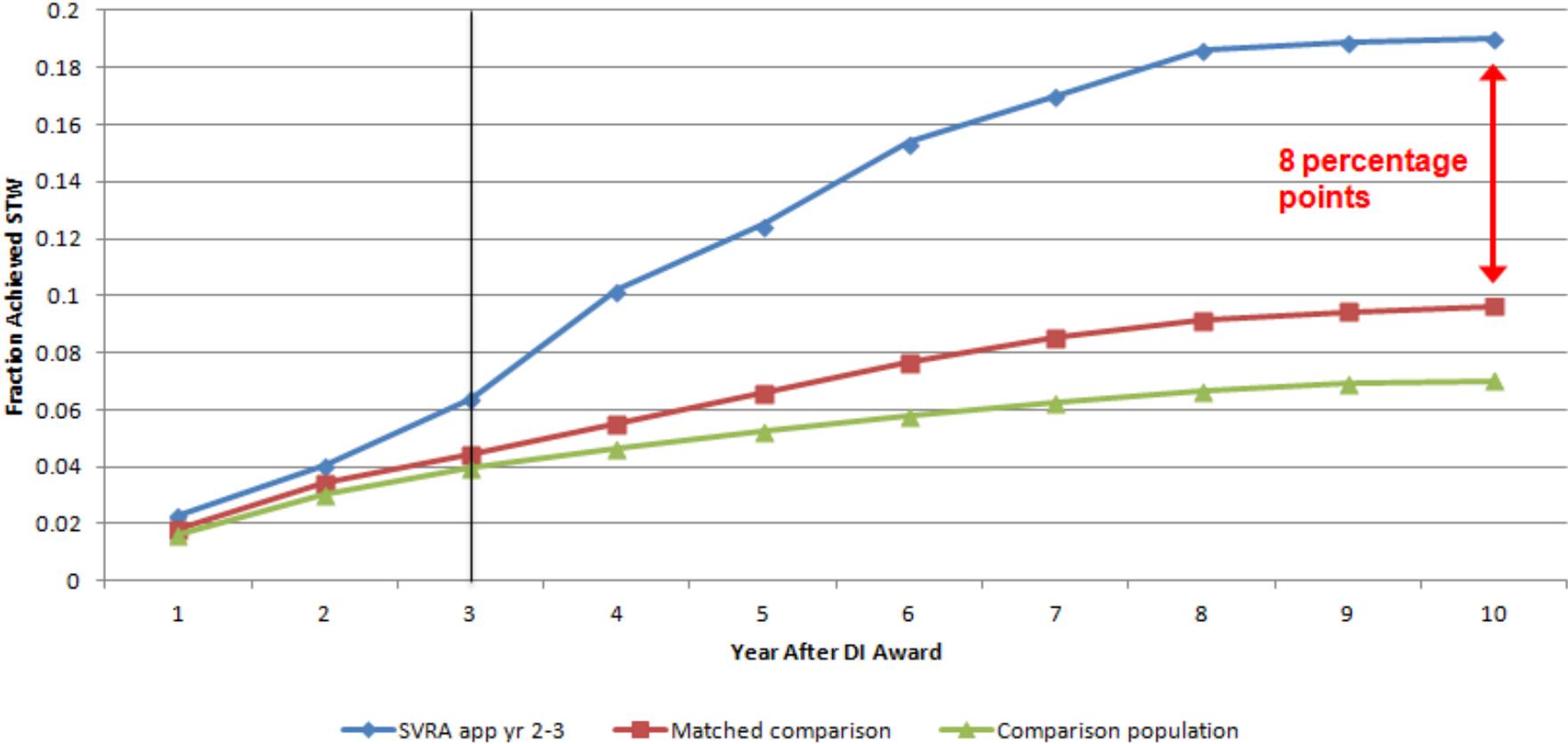
Dependent variables

- Two dichotomous dependent variables drawn from the DAF
- Whether a SSDI-only beneficiary had
 1. Completed TWP
 2. Benefits suspended or terminated due to work (STW)

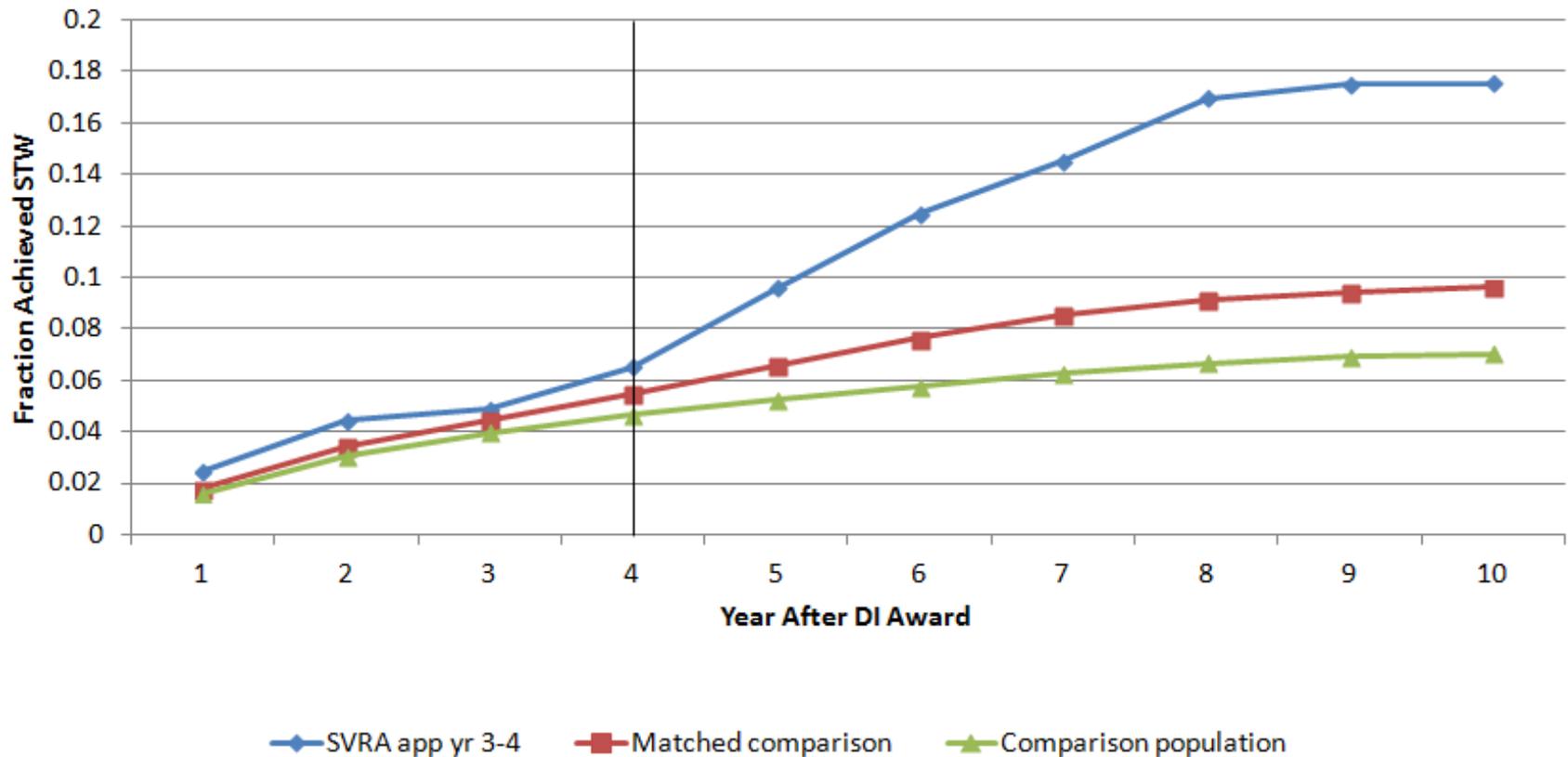
Data analysis

- Logistics regression was used to estimate relationship between SVRA service receipt and achievement of the above employment-related outcomes during each of the ten years after SSDI award

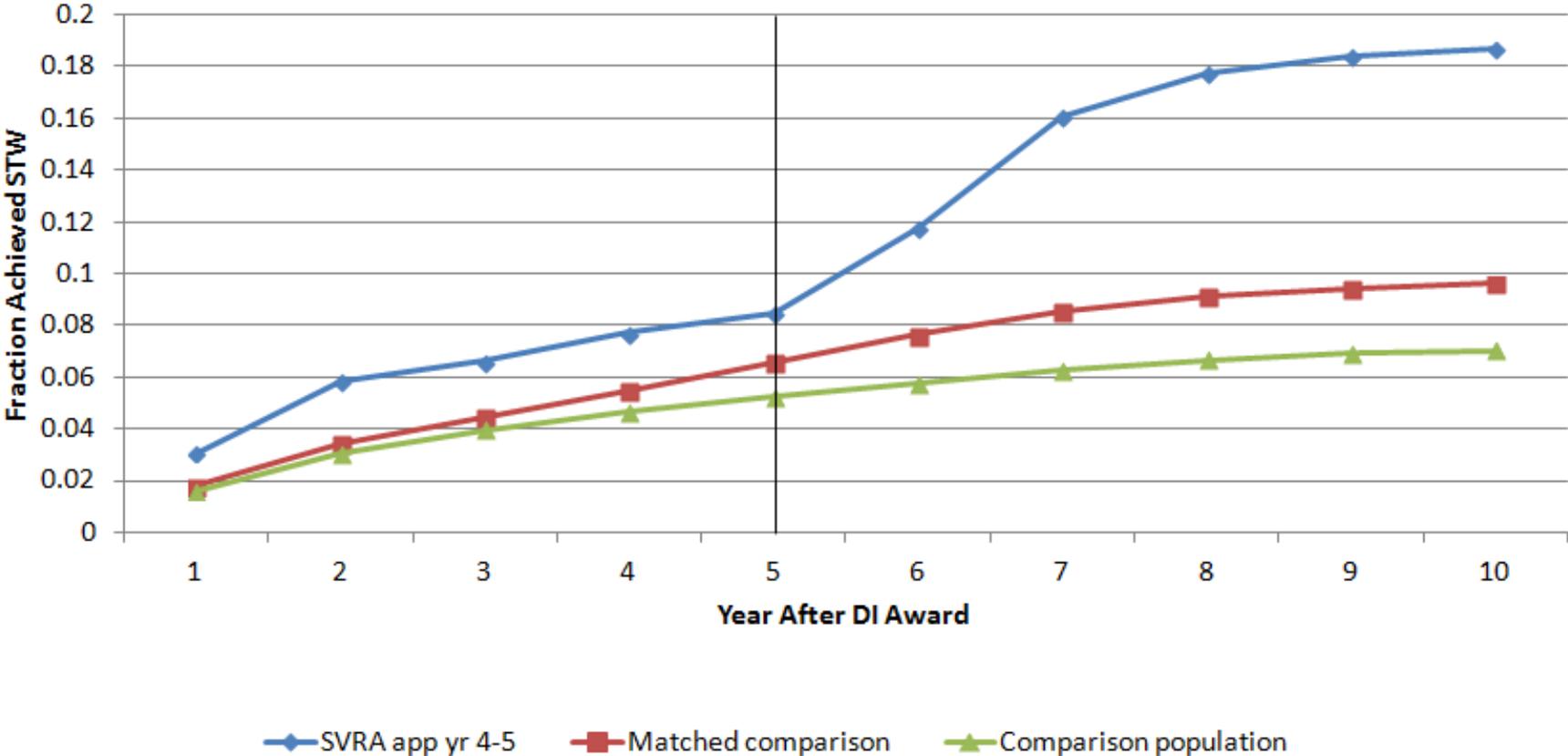
STW: SVRA Application 2-3 Years After DI Award vs. Comparisons



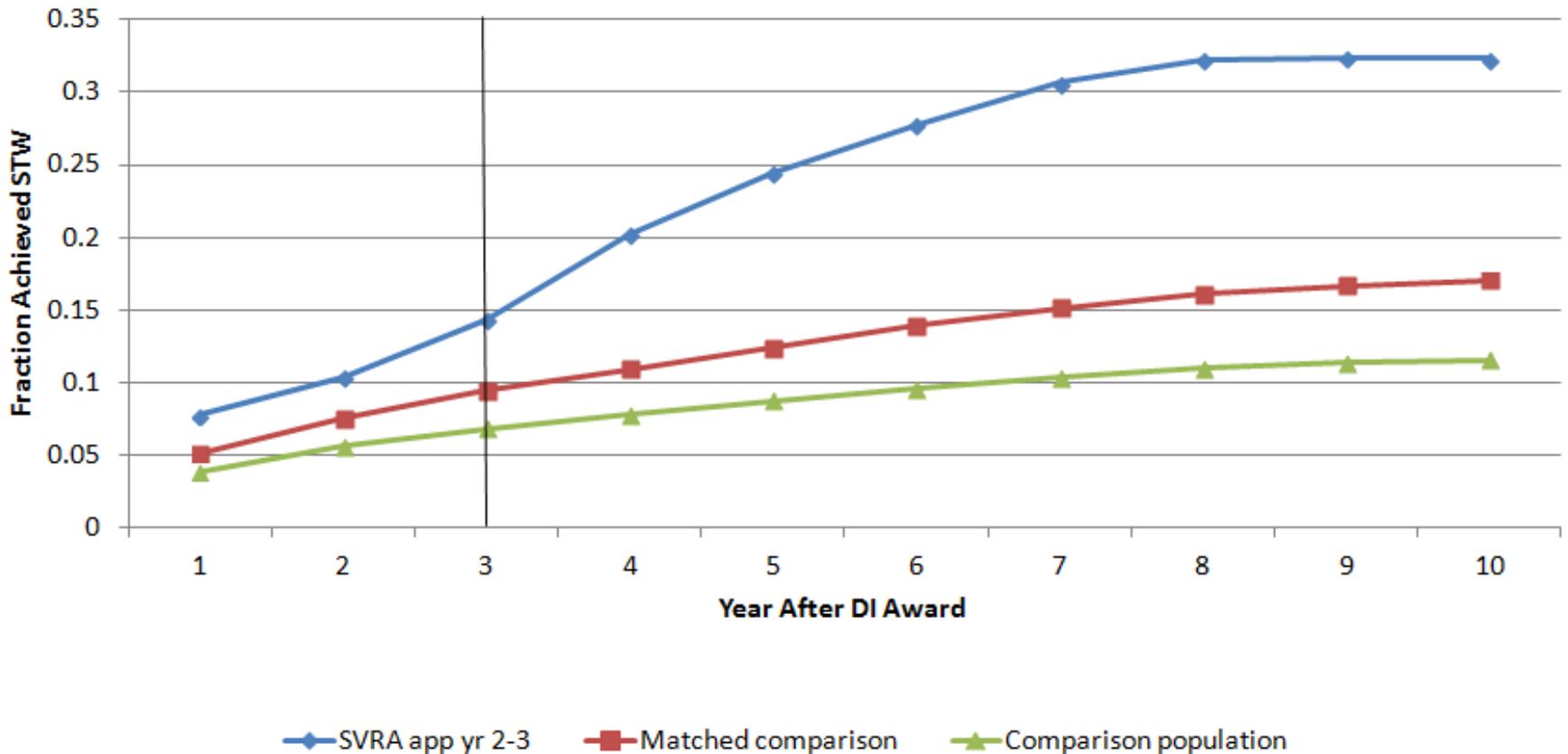
STW: SVRA Application 3-4 Years After DI Award vs. Comparisons



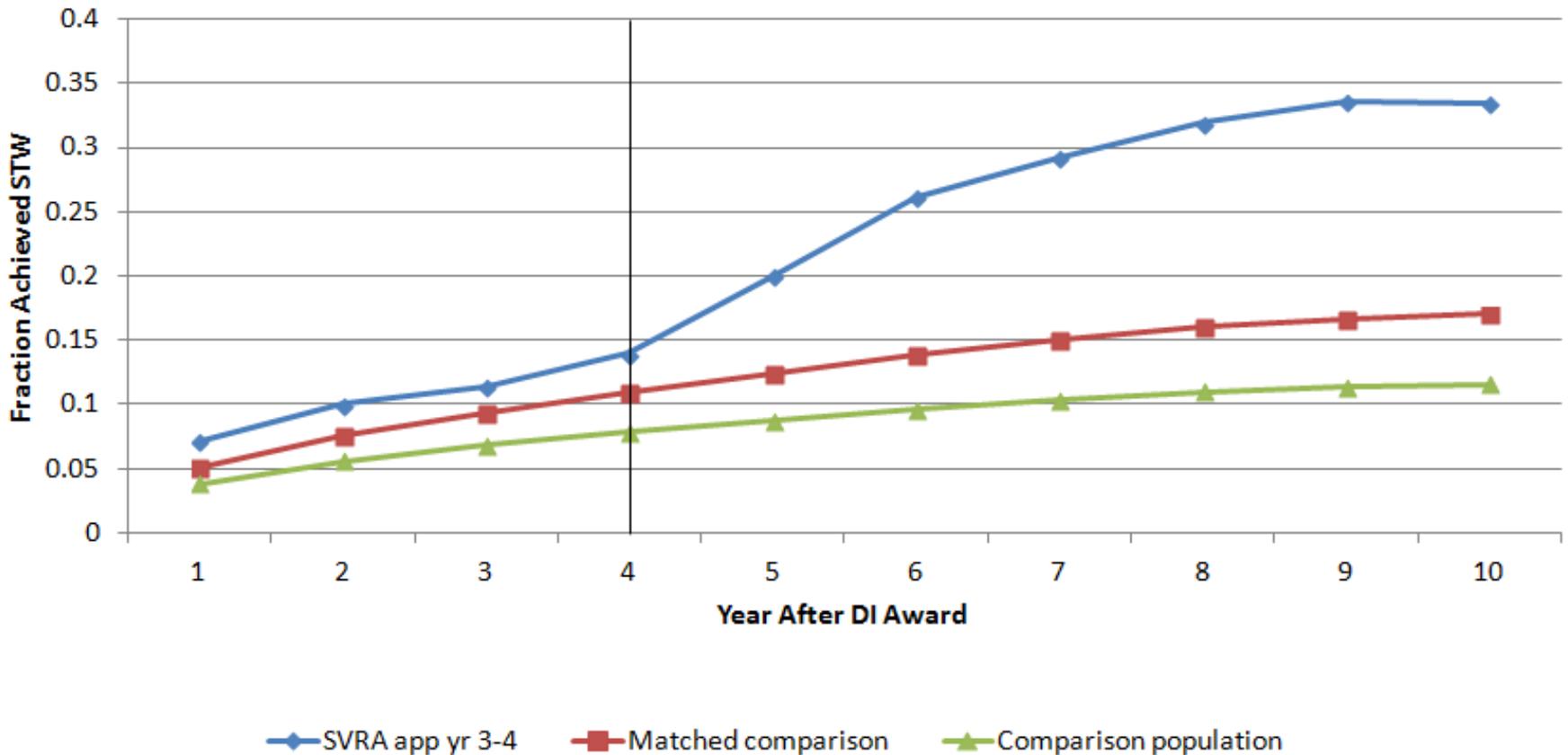
STW: SVRA Application 4-5 Years After DI Award vs. Comparisons



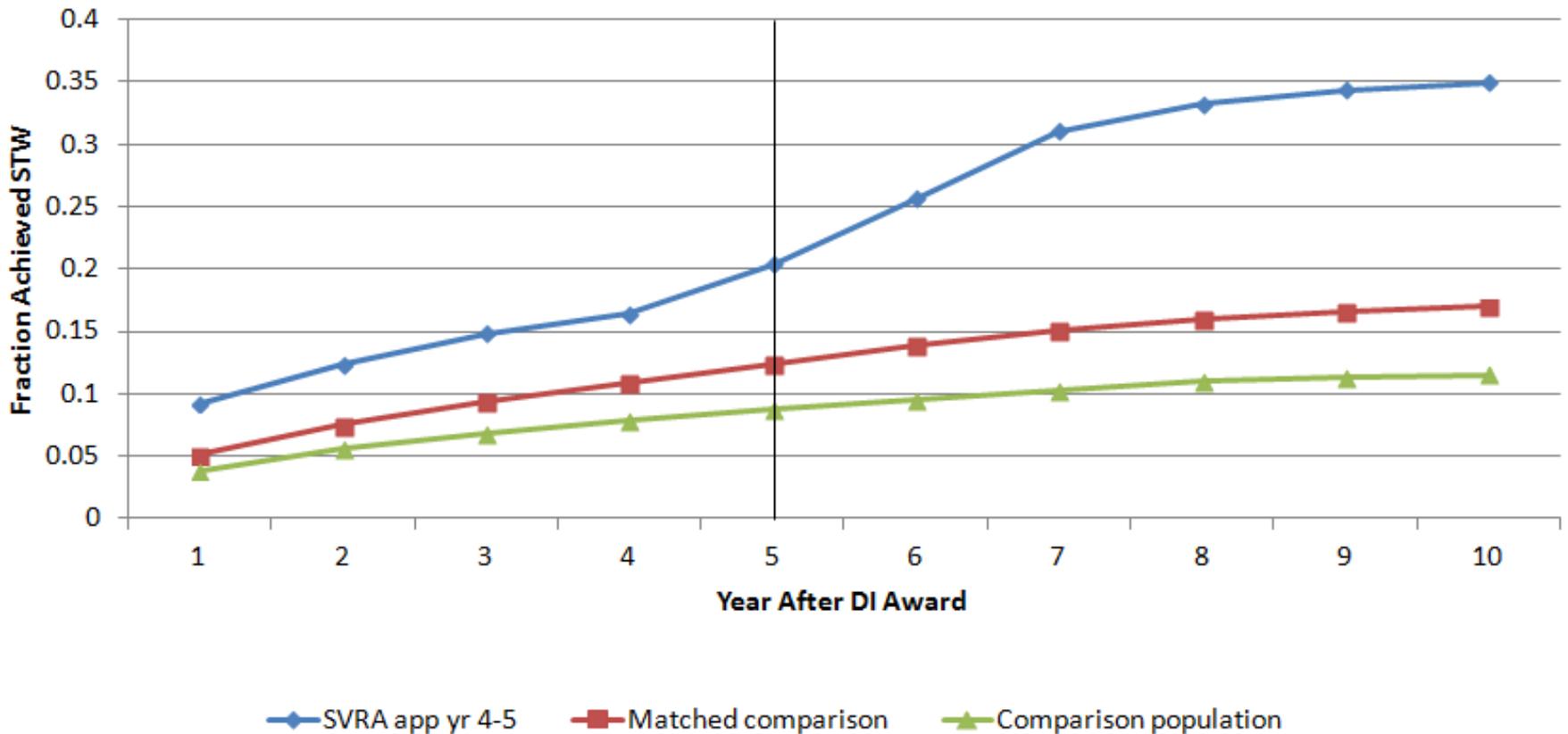
TWP Completion: SVRA Application 2-3 Years After DI Award vs. Comparisons



TWP Completion: SVRA Application 3-4 Years After DI Award vs. Comparisons



TWP Completion: SVRA Application 4-5 Years After DI Award vs. Comparisons



Summary and Interpretation of Results

- **We found that first-time SSDI beneficiaries who apply for SVRA services have better employment outcomes than first-time SSDI beneficiaries who don't apply**
- **For example, from among the first-time SSDI beneficiaries in 2000, of those who applied for SVRA services over the next five years, 19% achieved STW, and the unmatched comparison population, who never applied for SVRA services, achieved 7% STW**
- **These differences should not be interpreted as the effect of SVRA services because of selection bias**

Summary and Interpretation of Results (continued)

- **Selection bias can be due to many factors, such as greater work orientation, differential SVRA outreach efforts, family support for working, age, gender, race, level of education, lifetime earnings, amount of SSDI award**
- **We tried to strip away some of these alternative explanations using statistical methods to control for these differences at the time of SSDI award**
- **We also looked at the timing of employment outcomes relative to the timing of SVRA application to verify that differences were not simply differences that were observable prior to SVRA application**

Summary and Interpretation of Results (continued)

- **The results are encouraging for a couple of reasons**
 - 1. Differences between the applicant group and the matched comparison group remain substantial after controlling for a number of observable characteristics**
 - 2. These differences systematically increase over several years after SVRA application**
- **We can't rule out selection bias altogether because even after matching, we found that SSDI beneficiaries who would go on to become VR applicants in the future were already more likely to have achieved TWP completion and STW before they applied for SVRA services**

Contact Information

**John O'Neill, Ph.D., CRC
Kessler Foundation
300 Executive Drive
West Orange, NJ 07052
(973) 324-8387 Office
(973) 324-8373 Fax**

Joneill@kesslerfoundation.org

A Closer Look at the Services and Supports Workers with Disabilities Need to Stay Employed

Noelle Denny-Brown

**Presented at the Center for Studying
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- The opinions and conclusions expressed are solely those of the authors and do not represent the views of CMS or any other federal agency
- Read the full report at http://www.mathematica-mpr.com/~media/publications/PDFs/disability/services/supports_needed_employed.pdf (Noelle Denny-Brown, Bonnie O'Day, and Stephanie McLeod)

Motivation for This Study

- **Workers with disabilities have diverse needs for employment supports and accommodations**
- **Sources of coverage for these supports**
 - **Employer-sponsored health insurance**
 - **Employer-provided supports**
 - **Public health insurance**
 - **Workers' out-of-pocket expenditures**

Research Objectives

- **What types of services and employment supports do workers with disabilities who earn relatively high wages need in order to work?**
- **Where do workers with disabilities obtain these supports, and what strategies do they use to obtain and pay for them?**

Methods

- **Semistructured telephone discussions with 15 workers with disabilities who volunteered to participate and met the study criteria:**
 - **Had a visual, hearing, psychiatric, physical, or intellectual disability**
 - **Worked at least 20 hours per week**
 - **Earned above 250 percent of the poverty level**
 - **Had a work-support need related to their disability**
- **Convenience sampling was used to identify and recruit participants for this exploratory study**

Sample (n = 15) Is Selectively Different from General Population

- Number with earnings > \$50,000 in 2013: 8
- Number of current/former Social Security recipients: 11
- Percentage with a college degree: 87
- Mean age: 39
- Primary disability types:
 - Sensory (n = 8)
 - Physical (n = 4)
 - Psychiatric (n = 2)
 - Intellectual (n = 1)

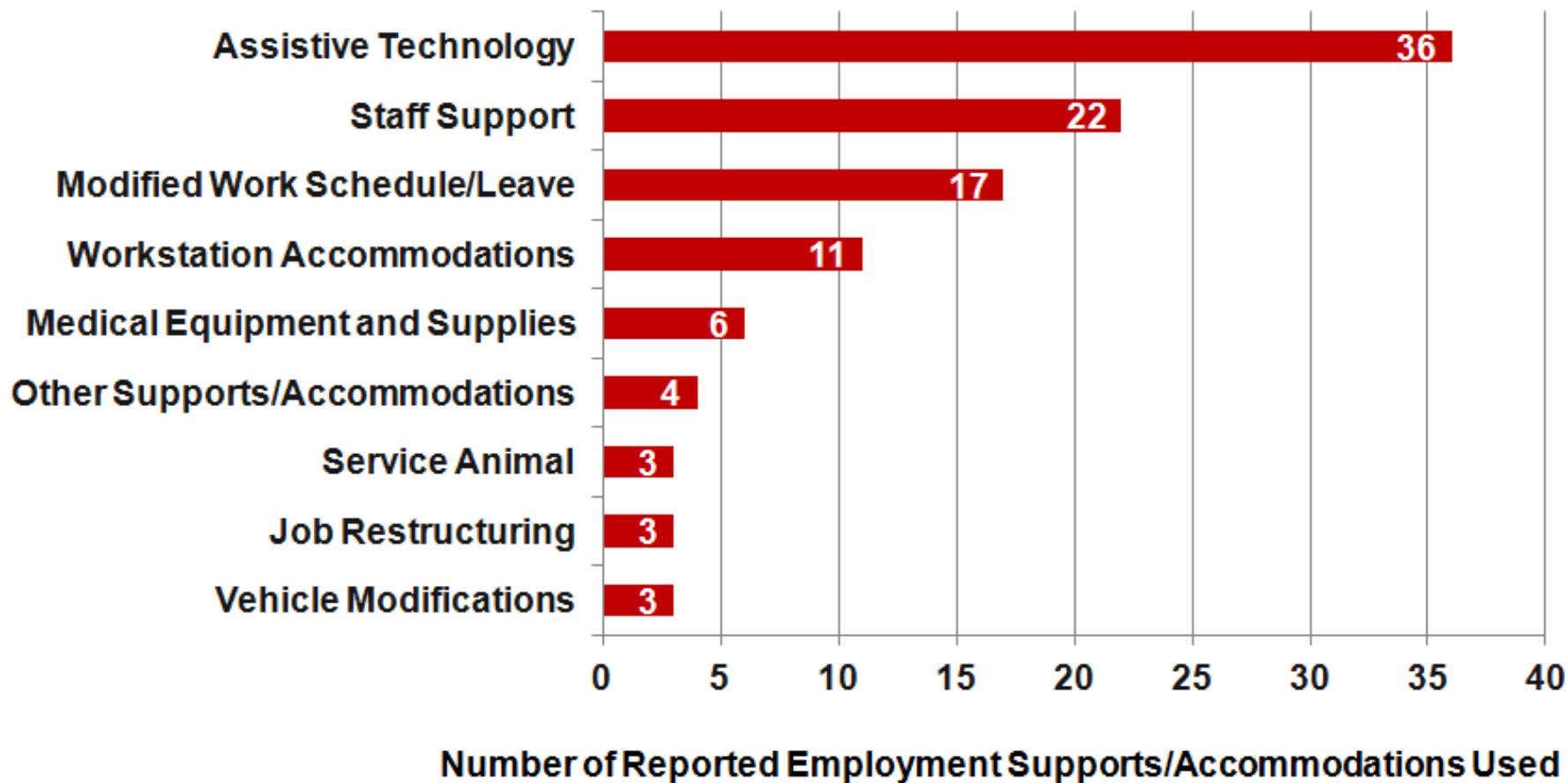
Test Your Knowledge

- **Of the 15 workers interviewed, how many spend more than \$2,500 out-of-pocket each year for work-related supports?**
 - a) 3**
 - b) 5**
 - c) 7**

Implications of Study Sample

- **Small, nonrandom sample; seven participants worked for organizations that provide services to people with disabilities or make special efforts to ensure that their services and products are accessible**
- **Participants had diverse support needs**
- **Case studies showed ways in which employees and employers used creative strategies to put supports in place**

Large Variation in the Number and Types of Supports Used on the Job



Key Finding: Universal Design Features Were Commonly Used on the Job

- **Universal design refers to products or environments that are designed to be usable by all people**
- **Participants relied on universal design features that are common in the workplace**
 - **Large computer monitors**
 - **Wireless keyboards**
 - **Phones with accessibility features**
 - **Ergonomic furniture**

Examples: Universal Design

Features Were Commonly Used on the Job

JB has physical, visual, and psychiatric impairments. She uses many types of technology available to the general public...JB uses accessibility features built into her Mac laptop, such as the zoom-in feature to enlarge print on the screen and the “sticky keys” feature to help with typing.

SO is blind. She uses Apple products on the job...to assist customers with making purchases, checking email, and searching for information online... She also uses Apple products off the job to listen to music, watch television...and even purchase coffee.

Key Finding: Accessible Transportation Was Key to Finding and Keeping a Job

- **Participants with physical disabilities used a modified vehicle obtained via:**
 - **Out-of-pocket expenditures**
 - **Employer**
 - **State vocational rehabilitation agency**
 - **Family member**
- **Other modes of transportation to and from work**
 - **Family-provided transport**
 - **Public transit**
 - **Walking**
 - **Taxi**

Examples: Accessible Transportation Was Key to Finding and Keeping a Job

DW has a physical impairment. For DW, the most critical support needed to work, besides his power wheelchair, is his modified van... DW's employer purchased his modified van with a wheelchair lift for company and personal use.

O is blind...The Metro system has accessibility features...that make it easy for her to use...O also uses a guide dog to help her navigate the transit system...O received her guide dog and training for the dog at no cost through a guide dog training program.

Key Finding: Creative Strategies Were Used to Obtain Equipment and Supports

- **Obtained handmade adaptive equipment to address personal care needs (n = 1)**
- **Purchased discounted wheelchairs that properly fit the individuals and met their needs (n = 2)**
- **Pursued employment at disability service organizations or companies that offered unique accommodations (n = 7)**
- **Became self-employed because it provides a flexible work schedule (n = 2)**

Examples: Creative Strategies Were Used to Obtain Equipment and Supports

D has a physical impairment... She took stock of all the tasks that she completed each day and worked with a family member to identify adaptive tools that would meet her needs... She and her brother designed and made a self-standing transfer board and a homemade reacher...

MI has a physical disability. She obtained a loan that was approved by the Federal Housing Administration (FHA) to purchase her home. When there were no accessible FHA-approved homes in her area, MI negotiated with the lender and later a contractor who equipped her home with accessibility features at no or low cost.

Key Finding: Out-of-Pocket Expenses for Supports Varied Substantially

- **Out-of-pocket costs ranged from \$0 to \$14,800 per year:**
 - Two participants had no out-of-pocket expenses
 - Five spent less than \$1,000
 - Five spent \$1,000 to \$2,500
 - Three spent more than \$2,500
- **Four participants went without services or supports they needed due to high out-of-pocket costs**
- **Barriers to accessing needed services included:**
 - Lack of employer-sponsored coverage
 - Costly co-insurance payments
 - Limited number of covered sessions

Examples: Out-of-Pocket Costs for Supports Varied Substantially

D has employed a personal attendant to help her prepare for work. D was unable to receive coverage...through her employer-sponsored health insurance... This resulted in an out-of-pocket expense of about \$9,000 each year...

JK's employer-sponsored health insurance does not cover the cost of telescopic lenses he needs to work. JK's employer pays for the item and any repairs... His employer has paid for two other supports he needs to do his job (a large monitor and staff support). JK does not incur any out-of-pocket costs for needed supports.

Summary of Key Findings

- 1. Types of supports and accommodations used varied based on the functional needs of workers**
- 2. Identification of needed supports was individualized and negotiated upfront**
- 3. Many supports provided by employers were not costly or resource intensive to provide**
- 4. The types and amount of out-of-pocket expenses for work supports varied substantially**
- 5. Participants were strategic in obtaining equipment and supports that met their needs**

For More Information

- Please contact:
 - Noelle Denny-Brown
 - ndenny-brown@mathematica-mpr.com
 - Bonnie O'Day
 - boday@mathematica-mpr.com

Discussant



David Wittenburg
Mathematica Policy Research

Test Your Knowledge

- **Which DI award cohort had better 5-year return to work outcomes?**
 - 1996, when the economy was expanding
- **How likely are beneficiaries who receive SVRA services to leave the SSDI program due to employment compared to matched comparison group?**
 - 8 percentage points more likely
- **Of the 15 workers interviewed, how many spend more than \$2,500 out-of-pocket each year for work-related supports?**
 - 3

Audience Q & A



Arif Mamun
Mathematica



Noelle Denny-Brown
Mathematica



John O'Neill
Kessler Foundation



Discussant:
David Wittenburg
Mathematica

Contact Information

**Center for Studying Disability Policy
Mathematica Policy Research**

<http://www.DisabilityPolicyResearch.org>

disabilityforums@mathematica-mpr.com