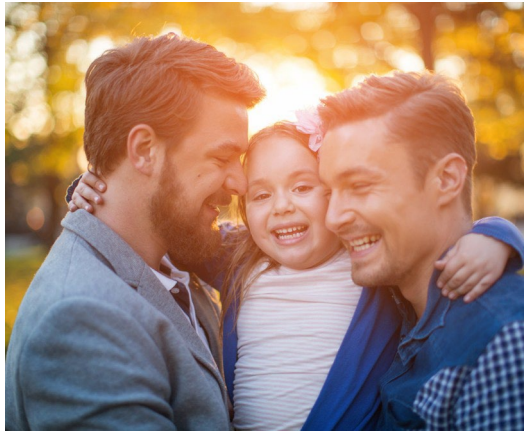Securing today and tomorrow

Social Security Administration

Agency Strategic Plan | Fiscal Years 2022–2026

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Message from the Acting Commissioner

I am pleased to present the Social Security Administration's *Agency Strategic Plan for Fiscal Years 2022–2026*. This plan communicates our vision to ensure equity in delivering Social Security services and improve the accessibility of our services to all. To fulfill that vision, we will improve access to Social Security services by addressing systemic barriers to full and equitable participation in our programs through: 1) optimizing the experience of SSA customers; 2) building an inclusive, engaged, and empowered workforce; and 3) ensuring stewardship of SSA programs.

For nearly 90 years, we have provided income security for the diverse population we serve. Over 70 million people receive benefits each year. While our core programs remain unchanged, we must modernize our service model to best serve our customers.

Through customer engagement, we will strive to understand our customers' needs, ensure access to our programs, and deliver customer-focused service. By expanding our digital service options for individuals who prefer them, we will improve customer experience and service in our local offices. We are working to better assist those who need in-person support, including customers with critical situations, complex claims, or limited internet or mobile access.

Over the past several years, we have invested in modernizing our information technology (IT) to build our customers' confidence in doing business with us online. Though we have made progress, changing technology requires continued improvements to provide our customers with efficient service and to support our employees' work. We must also address cybersecurity threats. Our advances in IT, authentication, and security will help ensure we remain focused on making the right payment to the right person at the right time and protecting our customers' personal information.

The knowledgeable, dedicated, and talented workforce that administers our complex programs is essential to our success. We will invest in our employees, as we eliminate barriers to hiring and advancement to foster an inclusive workforce. We will treat our employees equitably and provide support for their chosen career paths. We will empower our employees to use their talents to achieve our strategic goals and continue to make smart decisions about our resources.

We must effectively manage our programs and projects, assess and mitigate risks, and change course when necessary. As good stewards of our programs, we must continue our quality reviews, cost-effective program integrity work, and payment accuracy efforts to ensure eligible individuals receive the benefits to which they are entitled. By expanding the use of data analytics and predictive modeling and increasing the number and scope of strategic partnerships with other Federal agencies, we will be better positioned to serve recipients by confirming eligibility and preventing waste, fraud, and abuse.

This strategic plan is our vision for how we will evolve as an organization to exceed the service delivery expectations of our customers in the next five years. We remain committed to improving our customers' experience and safeguarding our programs.

Respectfully,

Kilolo Kijakazi

Baltimore, Maryland
March 28, 2022

Vision

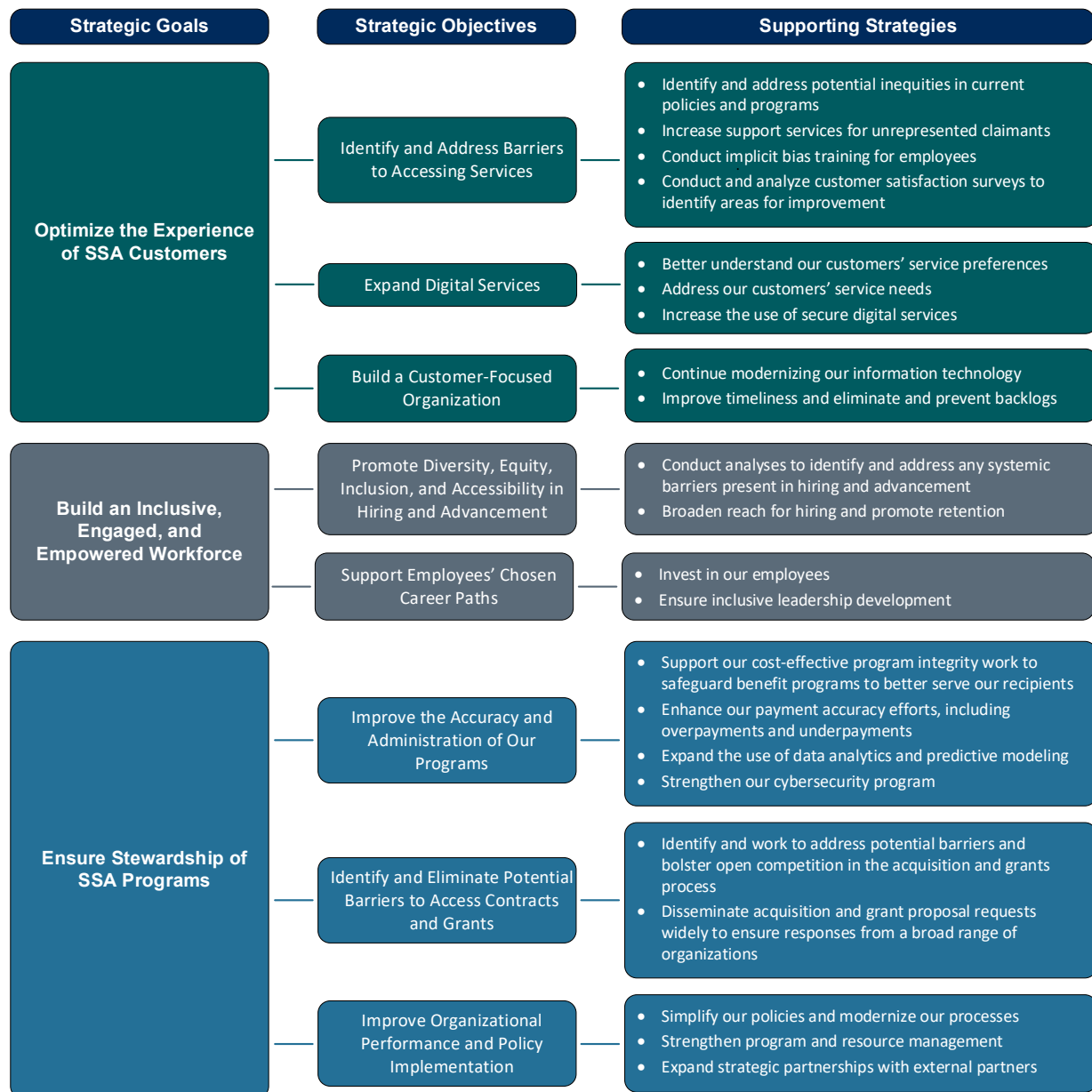Provide income security for the diverse population we serve.

Mission

Ensure equity and accessibility in delivering Social Security services by improving the customer experience and addressing systemic barriers to participation in our programs.

Strategic Framework

Our Strategic Plan for Fiscal Years 2022–2026, with goals that **Optimize the Experience of SSA Customers, Build an Inclusive, Engaged, and Empowered Workforce,** and **Ensure Stewardship of SSA Programs** and the associated objectives and supporting strategies, provides the framework for achieving our vision and mission. These goals are informed by strategic opportunities, our assessment of program evaluations, and our enterprise risk management (ERM) process, which help us improve the effectiveness of our organization and program administration. In addition, our FYs 2022–2026 Learning Agenda describes our evidence-building roadmap to support our strategic goals and objectives. Our 10 priority questions, each aligned to a specific strategic objective, aim to provide valuable information to promote evidence-based decision-making and improve operational outcomes.

Strategic Goals	Strategic Objectives	Supporting Strategies
Optimize the Experience of SSA Customers	Identify and Address Barriers to Accessing Services	• Identify and address potential inequities in current policies and programs • Increase support services for unrepresented claimants • Conduct implicit bias training for employees • Conduct and analyze customer satisfaction surveys to identify areas for improvement
	Expand Digital Services	• Better understand our customers' service preferences • Address our customers' service needs • Increase the use of secure digital services
	Build a Customer-Focused Organization	• Continue modernizing our information technology • Improve timeliness and eliminate and prevent backlogs
Build an Inclusive, Engaged, and Empowered Workforce	Promote Diversity, Equity, Inclusion, and Accessibility in Hiring and Advancement	• Conduct analyses to identify and address any systemic barriers present in hiring and advancement • Broaden reach for hiring and promote retention
	Support Employees' Chosen Career Paths	• Invest in our employees • Ensure inclusive leadership development
Ensure Stewardship of SSA Programs	Improve the Accuracy and Administration of Our Programs	• Support our cost-effective program integrity work to safeguard benefit programs to better serve our recipients • Enhance our payment accuracy efforts, including overpayments and underpayments • Expand the use of data analytics and predictive modeling • Strengthen our cybersecurity program
	Identify and Eliminate Potential Barriers to Access Contracts and Grants	• Identify and work to address potential barriers and bolster open competition in the acquisition and grants process • Disseminate acquisition and grant proposal requests widely to ensure responses from a broad range of organizations
	Improve Organizational Performance and Policy Implementation	• Simplify our policies and modernize our processes • Strengthen program and resource management • Expand strategic partnerships with external partners

Programs

Few Government agencies touch the lives of as many people as we do. We administer three programs under the Social Security Act:

- **Old-Age and Survivors Insurance (OASI):** Established in 1935, the OASI program provides retirement and survivors benefits to qualified workers and their family members. In fiscal year (FY) 2022, we estimate we will pay OASI benefits to nearly 57 million beneficiaries on average each month. We estimate we will pay over $1 trillion to OASI beneficiaries in FY 2022.

- **Disability Insurance (DI):** Established in 1956, the DI program provides benefits for workers who become disabled and for their families. In FY 2022, we estimate we will pay DI benefits to nearly 10 million beneficiaries on average each month. We estimate we will pay over $150 billion to DI beneficiaries in FY 2022.

- **Supplemental Security Income (SSI):** Established in 1972, the SSI program provides financial support to aged, blind, and disabled adults and children who have limited income and resources. In FY 2022, we estimate we will pay SSI benefits to nearly 8 million recipients on average each month (approximately 2.7 million of whom concurrently receive OASI or DI benefits). We estimate we will pay nearly $63 billion in SSI Federal benefits and State supplementary payments in FY 2022.

In addition, we support national programs administered by other Federal and State agencies, as required by law, such as Medicare, the State Children's Health Insurance Program, E-Verify, Medicaid, the Supplemental Nutrition Assistance Program, and Federal Benefits for Veterans, as well as programs associated with the Employee Retirement Income Security Act of 1974, the Coal Industry Retiree Health Benefit Act, and the Help America Vote Act.

Organization

Nearly 60,000 Federal employees and approximately 15,000 State employees serve the public from a network of more than 1,500 offices across the country and around the world. Most of our employees serve the public directly or provide support to employees who do.

We administer our programs and services online, by phone, and in-person in our offices. Our customers can access services such as applying for retirement, disability, and Medicare benefits; checking the status of an application or appeal; or requesting a replacement Social Security card.

Our National 800 Number handles over 30 million calls each year. Callers can conduct a variety of business transactions either by speaking directly with an agent or using our 24-hour automated services, which include requesting benefit verification letters, ordering replacement Medicare cards, and obtaining claim status updates.

Our processing centers handle complex Social Security retirement, survivors, and disability benefit payment decisions, as well as provide support to our National 800 Number. State agencies make disability determinations for initial claims, reconsiderations, and continuing disability reviews. Administrative law judges in our hearing offices and administrative appeals judges in our Appeals Council decide appealed cases.

For more information about our organization and its functions, visit our organizational structure webpage at www.ssa.gov/org.

Strategic Goal 1: Optimize the Experience of SSA Customers

Through our OASI, DI, and SSI programs, we provide essential benefits to retirees, survivors, elderly, or blind and disabled individuals, including those with limited income and resources who rely on us to meet life's basic needs. We also support our nation's workforce who are paying into Social Security, by providing Social Security numbers, recording wages and earnings, and maintaining and improving services for workers and their families when they need to access our programs.

Serving our customers is at the heart of all we do. We listen to our customers and adjust how we do business to meet their needs. Partially in response to customer feedback, we have offered more services online, expanded ways to obtain claims status, and changed how employers share information with us. For example, we piloted an electronic wage filing that simplifies the process for employers to submit annual wage data. Now, we are strengthening our commitment to optimizing customer experience through all steps of accessing our programs. Optimizing the experience of our customers means we provide timely, accurate, and more efficient access to our services through the delivery channels customers prefer. Doing so requires a better understanding of our customers' evolving needs, advancing inclusive policies, and ensuring equity throughout our programs (e.g., targeted outreach to communities of color and underserved communities). It also requires that we continue to examine our current policies and procedures to ensure they are as efficient and equitable as possible.

We are dedicating agency resources to focus on customer experience and transforming the way we obtain and use customer feedback. We expect our customer experience strategies to result in continually improving service delivery. These strategies include adopting human-centered design and standardizing customer experience and satisfaction data collection.

Strategic Objective 1.1 – Identify and Address Barriers to Accessing Services

Lead: *Deputy Commissioner for Operations and Deputy Commissioner for Retirement and Disability Policy*

Equity is the bedrock of American democracy, and our diversity is one of our country's greatest strengths. Entrenched disparities in our laws and public policies, and in our public and private institutions, have often failed to serve individuals and communities equitably. We must identify and address disparities that underserved communities and individuals may face in accessing our programs and services. We are improving our outreach to include diverse stakeholders and developing relationships with diverse advocates, civil rights organizations, and community organizations. In addition, answering Priority Question #1 will provide evidence on the characteristics of people who face barriers in

> **① PRIORITY QUESTION**
>
> *What are the effects of changes to our service delivery methods on the accessibility, use, efficiency, security, and equitable delivery of our services?*

accessing our services and will inform our efforts to deliver more effective and equitable services. More information about our efforts to serve all of our customers equitably, please refer to our Equity Action Plan (www.ssa.gov/policy/about/racial-equity-resources.html).

We will increase accessibility by streamlining our applications and dedicating personnel to assist individuals identified as potentially eligible for our programs. Additionally, we will ensure unrepresented individuals at disability hearings have information about their service delivery options, understand their right to representation, and are prepared to participate in hearings with administrative law judges. We will use answers to Priority Question #2 to ensure the disability programs are meeting customer needs.

To support equitable and consistent administration of our programs and services for our customers, we will provide implicit bias awareness training for our employees and track and analyze customer satisfaction and complaints.

Strategies:

Identify and address potential inequities in current policies and programs

We will routinely engage in conversations with external stakeholders to discuss service delivery methods and how we can achieve efficiencies. We will extend our outreach campaigns to national organizations to reach underserved communities across the country. We will continue to develop and maintain a network of advocates and community-based organizations and meet with them regularly to address the needs of people facing barriers.

In addition, we will increase our collection of data by race and ethnicity and employ it to discern whether there are differences in the rate of participation in our programs or disparities in average benefit levels. If there are, we will assess the potential factors contributing to these differences and work to address them.

Increase support services for unrepresented claimants

Our customers have a right to have a representative to help them conduct business with us. However, nearly 20 percent of claimants at the hearing level do not have representation. We will support unrepresented claimants at the hearing level during our administrative review process. Through improved outreach, our goal is to prepare unrepresented individuals to participate in the hearing process before an administrative law judge. We will also examine our processes and procedures for potential actions that may result in disparate outcomes for unrepresented individuals.

Conduct implicit bias training for employees

We established a workgroup on implicit bias and worked with training experts to assess and develop new training and a proposed curriculum. We will devise and implement agency-wide policies and trainings to increase equity and equality in our programs. We will use pre- and post-training evaluations to better understand implicit bias within our organization and the impact of our trainings to mitigate bias.

Conduct and analyze customer satisfaction surveys to identify areas for improvement

We will analyze data to identify areas for improvement. We will consider the perspectives of different data sources, such as our ongoing customer satisfaction, prospective client, and retirement application surveys. We will also review and analyze civil rights complaints submitted by the public.

Long-term Performance Goals:

- Improve equity in our Supplemental Security Income program through increased outreach and improved benefit delivery, including to communities of color and underserved communities.

- Improve equity and benefit delivery in our programs through increased outreach and the detection of disparities using data collection and analysis.

Strategic Objective 1.2 – Expand Digital Services

Lead: *Deputy Commissioner for Operations and Deputy Commissioner for Systems*

To optimize customer experience, we must better understand our customers' service needs and priorities. We will collect customer feedback through various touchpoints as they seek access to our programs, target solutions to address that feedback, and monitor and improve our processes to meet customers' evolving needs.

Because customers increasingly do business with us online and by phone, we will continue to enhance our digital services—including online, and self-service options—to allow customers to complete more transactions with us using their preferred contact method. The resulting analysis and assessment from Priority Question #3 will provide additional evidence and data to prioritize changes that will facilitate the use of our digital services.

> **3 PRIORITY QUESTION**
>
> *What are the key factors that influence the public's use of our online services, including the services we deliver through my Social Security, and what are the effects of methods to modify these key factors on our customers' decisions to create my Social Security accounts and use our online services?*

Strategies:

Better understand our customers' service preferences

To improve the customer experience, we will deepen our understanding of our customers, including what drives their evolving service preferences. We will learn more about our customers' journey through various service channels and touchpoints. We will use Voice of Customer feedback to understand our customers' needs and preferences and adjust to improve their experience. Specifically, an enterprise-wide Voice of Customer feedback will allow us to capture real-time customer feedback across all service channels, which we will use to identify customers' pain points and assess effectiveness of current and new processes.

Address our customers' service needs

We will implement industry leading customer experience best practices to analyze our customers' journeys from start to finish. Through this analysis, we will identify opportunities for improvement and develop and implement solutions that will improve our customers' experiences. Solutions will include expanding options that provide a fully digital service experience for many of our services on a variety of electronic devices and from any location with internet service. We will also introduce new online options and continue to provide and improve service through our phone and in-office service channels. For example, customers will be able to express an intent to file for SSI benefits online and use a mobile-accessible, online process to upload forms and other documentation.

Increase the use of secure digital services

While we provide the public with additional digital services such as online, remote, and self-service options that represent the best of current technology, we must do so in a way that maintains our strong commitment to protect our customers from current and emerging threats including identity theft and scams to steal money or personal information. The combination of additional service options and secure access allows our customers to confidently use our digital services.

Long-term Performance Goals:

- Increase the number of services and forms available on our secure digital platforms to provide more convenient, user-friendly, and secure digital self-service options.

- Increase the usage of our secure digital services so that customers can conduct business with us at their convenience.

Strategic Objective 1.3 – Build a Customer-Focused Organization

Lead: Deputy Commissioner for Operations, Deputy Commissioner for Hearings Operations, and Deputy Commissioner for Systems

We are aligning our operating model, service delivery strategy, and information technology (IT) strategy to better support our customers, including people facing barriers to our services.

Our *IT Modernization Plan*, initiated in FY 2018, laid the groundwork for transforming our legacy systems and enhancing our service delivery. Building on the plans described in our *IT Modernization Plan, 2020 Update*, we will modernize our infrastructure to keep pace with customer demands and industry standards. In addition, we will automate more customer communications including increase in inventory of notices available online, and expand our use of emails, texts, and video to respond to customer questions quickly. We will expand the ability to securely upload forms, documentation, evidence, and correspondence without the need for service-specific tools or traveling to a field office. We will also improve communications with customers and streamline application processes. The findings in Priority Questions #4, #5, and #6 will provide us with information to deliver clearer and more effective communication, improve our knowledge of how people access information on our programs, and give us insights into effective ways to communicate with the public about our disability programs.

Strategies:

Continue modernizing our information technology

We will provide employees with effective, easy-to-use tools that help them serve our customers more efficiently. We will continue to improve self-service support tools and video options, allowing our customers to choose how and when to conduct transactions and receive immediate access to available online records, support, and service. Improvements in our IT will, for example, improve the accuracy and timeliness of our decisions and enable the public to provide medical evidence and schedule appointments online.

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④ PRIORITY QUESTION

What are the effects of changes to our communication methods on customer satisfaction, program integrity, and administrative efficiency?

⑤ PRIORITY QUESTION

Does redesigning the Social Security Statement and providing supplemental fact sheets with customized information on Social Security's programs improve people's knowledge of the programs and increase the use of internet services?

⑥ PRIORITY QUESTION

Does the working-age population have accurate knowledge of the Social Security disability programs, and to what extent does the working-age population's knowledge, attitudes, and perceptions of the Social Security disability programs influence the decision to pursue benefits?

Improve timeliness and eliminate and prevent backlogs

The COVID-19 pandemic disrupted our operations and caused backlogs to grow in several parts of our organization. The number of initial disability claims pending and the average processing time for these claims has increased. The COVID-19 pandemic continues to influence fundamental parts of our initial disability claims process such as the reduced number of medical providers willing to conduct in-person consultative examinations. We have made it a priority to improve the average processing time for initial claims generally and work down older cases, even as our initial claims receipts are projected to increase. Our Agency Priority Goal (APG) on initial disability claims reflects this commitment.

We will identify opportunities in policies, workloads, and processes for improving and enabling efficient and effective operations. We will improve claims systems, such as the disability claims processing system, by increasing our access to electronic medical information to make timely and policy-compliant disability determinations and improve our customers' disability application experience.

While we are striving to eliminate the hearings backlog in FY 2023, we are exploring technology enhancements, including greater automation and policy and process efficiencies to eliminate and prevent hearings delays and backlogs. We will explore automation options for other backlogs, such as initial disability claims and our processing center workloads and improve National 800 Number service performance.

Long-term Performance Goals:

- Improve the customer experience by reducing the Average Speed of Answer on the National 800 Number.

- Improve the customer experience by reducing the average processing time for initial disability claims and by prioritizing those individuals who have waited the longest for initial disability determinations.

- Increase our customers' ability to electronically transact business with the agency to increase equity and accessibility to our services.

Strategic Goal 2: Build an Inclusive, Engaged, and Empowered Workforce

Through their compassion and dedication, our talented employees are the heart of the agency. A trained, inclusive, engaged, and empowered workforce, with the proper tools to do their jobs, is critical to our success. However, we are currently challenged by an increasing number of retirements and staff attrition that is causing a loss of institutional knowledge and complicating knowledge transfer. Based on staff feedback from employee surveys and exit interviews, we have learned about potential causes of attrition, which we are working to address. These efforts include hiring and retaining exceptional people, supporting their chosen career paths, continually offering them tools to do their jobs, and investing in our employee development and training programs.

To improve organizational performance and effectiveness, we are aligning our human capital policies to support in-person and remote customer service delivery. We will use these policies, as well as existing and emerging technologies, to attract, train, develop, and retain our workforce.

We celebrate diversity and are committed to creating an inclusive environment for all employees. We are promoting equity by developing and implementing diversity, inclusion, and cultural awareness training for all employees. We will ensure our hiring and promotion practices promote equity as we continue to build a workforce that reflects and delivers customer-focused service to diverse populations.

Strategic Objective 2.1 – Promote Diversity, Equity, Inclusion, and Accessibility in Hiring and Advancement

Lead: *Deputy Commissioner for Human Resources and Office of Civil Rights and Equal Opportunity*

We are committed to promoting diversity, inclusion, fairness, and equity. The diversity of our workforce is one of our greatest strengths. Our goal is to attract and retain employees who reflect the public we serve, are committed to our mission, and dedicated to providing quality customer experience. We will promote a workplace that recognizes and celebrates our employees' unique abilities and encourages the full contributions of all. The findings from our evidence-building activities related to Priority Question #7 in our Learning Agenda will inform our efforts to achieve this objective.

We will continuously strive to expand applicant pools through targeted recruitment of underrepresented groups. We will

> **❼ PRIORITY QUESTION**
>
> *To what extent are there systemic barriers to hiring, developing, and advancing a diverse and talented workforce and what are the effects of our Action Plan to mitigate those barriers in support of our goal to build an inclusive, engaged, and empowered workforce?*

engage our Advisory Council Chairs within the Diversity and Inclusion Council, who have connections with the communities they serve and can play a key role to broaden our recruitment efforts among underrepresented groups. We will also seek talented candidates through collaborations with universities—such as Historically Black Colleges and Universities (HBCU) and Minority Serving Institutions (MSI) internship programs, inter-agency partnerships, and agency-wide developmental programs.

Strategies:

Conduct analyses to identify and address any systemic barriers present in hiring and advancement

To ensure a workforce that reflects the diversity of our customers at all levels of the organization, we will conduct analyses to determine if systemic barriers exist and work to remove any barriers we find. We will implement changes in hiring and career advancement, particularly around training. We will rethink our workplace culture, as necessary, to further these commitments.

Broaden reach for hiring and promote retention

Increased workplace flexibility and the increasing use of online services allows us to broaden our geographic reach for hiring and retention in a way that complements our efforts to promote diversity and equity in hiring and advancement, where flexibilities are compatible with how we deliver our mission. Exploring workplace flexibilities, such as remote work when it fits within mission requirements; create greater interest in Federal employment with us; provide the opportunity for stability, attractive pay, and benefits packages; and offer opportunities for the best qualified job candidates regardless of their physical location.

Long-term Performance Goal:

- Increase workforce diversity through improved recruitment, hiring, and retention.

Strategic Objective 2.2 – Support Employees' Chosen Career Paths

Lead: *Deputy Commissioner for Human Resources*

We will invest in our employees, increase their engagement, and support their efforts to create fulfilling careers. We will offer dynamic career paths and opportunities for professional growth—helping employees become experts and encouraging participation in cross-government initiatives, such as through leadership development programs.

We will prioritize career growth and leadership development. Our performance management system will equitably reward high performance and incorporate well-defined and clearly communicated standards for success. Employees will receive meaningful individualized feedback on a continual basis to guide their development. Our employee-centered programs will

foster skills development and facilitate knowledge transfer. We will assess training needs at the organizational level as well as the individual level, as our programs continually improve. Our training programs will be dynamic, address critical skill gaps, and will be crafted and adjusted according to our mission.

Strategies:

Invest in our employees

We will provide agency managers with the tools and resources to enhance their skills and competencies, optimize organizational performance, address current and future workforce needs, and attract the talent we need to achieve our business goals. We will modernize our talent management systems to support interactive and job-specific activities across the employee lifecycle, further supporting management accountability for improved employee performance and engagement. We will create opportunities for our employees to design, develop, and implement strategies to improve service to our customers and performance across the agency. These measures should boost employee engagement and employee empowerment, which will improve the employee experience, and lead to improvements in our customer experience.

Ensure inclusive leadership development

One of our greatest challenges is maintaining operations when experienced employees leave the agency. For example, as of October 1, 2021, approximately 25 percent of our employees were eligible to retire. To ensure continuity in our public service, we will invest in our future leaders by developing job-enrichment opportunities to facilitate the transfer of job knowledge from employees eligible for retirement to retained employees. Employees will have opportunities to participate in development programs that will broaden their skills and prepare them for leadership positions.

Long-Term Performance Goals:

- Increase employee engagement and empowerment as measured in the Federal Employee Viewpoint Survey.

- Expand and maximize leadership development opportunities to promote employee retention and strengthen succession planning.

Strategic Goal 3: Ensure Stewardship of SSA Programs

One out of five Americans receives Social Security benefits at any given time and counts on us to provide accurate information and payments. As good stewards, we continue to look for ways to do business better, by addressing the root causes of improper payments, improving payment accuracy (including overpayments and underpayments), bolstering full and open competition in the acquisition and grants process, and applying sound management principles to everyday work. We are committed to continually improve the administration of our programs and work to identify and address potential inequities.

Strategic Objective 3.1 – Improve the Accuracy and Administration of Our Programs

Lead: *Deputy Commissioner for Analytics, Review, and Oversight and Deputy Commissioner for Systems*

As good stewards of our programs, we must protect the privacy of our customers and integrity of our programs, and prevent fraud, waste, and abuse. We will continue our effective program integrity work—including medical and work continuing disability reviews, SSI non-medical redeterminations, and the cooperative disability investigation program—which saves billions of program dollars with a proportionally small investment of administrative resources. We will develop, drive, and prioritize business processes, policies, and automation improvements that ensure appropriate benefit decisions and target the root causes of improper payments. Answers to Priority Question #8 will provide a clearer picture of why cases are remanded and assist in developing recommendations for business process changes. We will continue to collaborate with our Office of the Inspector General, and support its work to combat fraud, including Social Security-impersonation schemes, and to educate the public to avoid scams. These efforts also help to ensure public confidence in our programs and operations.

> **8 PRIORITY QUESTION**
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> *What factors contribute to Federal court remands of disability decisions, and what are the effects of modifying relevant factors on the percentage of final decisions that are affirmed upon judicial review?*

Data analytics and predictive modeling give us more tools to detect and prevent fraud and cybersecurity threats. Through our cybersecurity program, we protect the public's information in our records, ensure continued payments to millions of beneficiaries, and enable the uninterrupted availability of our network, systems, and IT resources. We must remain vigilant to potential cybersecurity threats and ensure a safe and resilient environment.

Strategies:

Support our cost-effective program integrity work to safeguard benefit programs to better serve our recipients

Dedicated program integrity funding helps ensure individuals receive the benefits to which they are entitled, and it safeguards the integrity of benefit programs to better serve recipients by confirming eligibility, improving payment accuracy for both overpayments and underpayments, and preventing fraud. In addition, program integrity funding allows us to conduct SSI redeterminations, conduct the anti-fraud cooperative disability investigations program, and support special attorneys for fraud prosecutions. We will continue these efforts to ensure public confidence in our programs and operations.

Enhance our payment accuracy efforts, including overpayments and underpayments

We are committed to mitigating and preventing improper payments by leveraging audit recommendations, implementing automation and business process improvements, and enhancing data analytics. We continue to pursue workflow adjustments, policy and notice changes, training and reminders for technicians, and automation solutions to improve post-entitlement accuracy. We will increase our outreach to underserved populations, simplify our policies and procedures to ensure eligible individuals receive the benefits for which they are entitled, automate tools to alert beneficiaries of overpayments and underpayments, and continue to allow electronic payments.

Expand the use of data analytics and predictive modeling

We will continue to strengthen and expand the use of large-scale data analytics, complex data modeling, and related technologies to detect, deter, and prevent fraud, as well as identify potential additional benefits. We plan to enhance our enterprise fraud risk management program by introducing more risk assessment activities.

Strengthen our cybersecurity program

We strive to maintain a highly effective cybersecurity program to protect against security threats and comply with Federal policies and regulations. The continued strength and resilience of our cybersecurity program is critical to protecting the personally identifiable information we store, and enabling uninterrupted availability of our network, systems, and IT resources.

Long-term Performance Goal:

- Improve the integrity of the Supplemental Security Income program by reducing overpayments and underpayments to ensure eligible individuals receive the benefits to which they are entitled.

Strategic Objective 3.2 – Identify and Eliminate Potential Barriers to Access Contracts and Grants

Lead: Deputy Commissioner for Budget, Finance, and Management

Government programs should equitably serve all eligible individuals, and government contracting and grant opportunities should be equitable for all eligible providers of goods and services. We will build long-term relationships with academic and professional associations and develop equity-based guidelines to encourage participation in agency research grant and contract opportunities by HBCUs and MSIs.

We will also encourage access and participation from Historically Underutilized Business (HUB) Zones, Woman-Owned, Veteran-Owned, and Small Disadvantaged Businesses by recognizing and removing hurdles they may face in taking advantage of agency procurement opportunities.

Strategies:

Identify and work to address potential barriers and bolster open competition in the acquisition and grants process

We will conduct market research in accordance with regulations to bolster full and open competition in the acquisition and grants process to the maximum extent practicable. We will devise best practices to encourage participation by institutions serving students of color, including direct communications with professional associations. We will also develop best practices to secure contracts with qualified HUBZone, Woman-Owned, Veteran-Owned, and Small Disadvantaged Businesses.

Disseminate acquisition and grant proposal requests widely to ensure responses from a broad range of organizations

We will meet with HBCUs and MSIs to learn more about their experience with our grantmaking process, potential barriers the process presented, and suggestions for eliminating barriers. We will meet with bidders and recipients of our contracts for HUBZone, Woman-Owned, Veteran-Owned, and Small Disadvantaged Businesses to learn about their experiences with our procurement process, barriers they encountered, and recommended solutions to eliminate these barriers.

Long-term Performance Goal:

- Improve access to contracting and grant opportunities for underrepresented groups and research institutions serving people of color.

Strategic Objective 3.3 – Improve Organizational Performance and Policy Implementation

Lead: *Deputy Commissioner for Retirement and Disability Policy and Deputy Commissioner for Budget, Finance, and Management*

We continually improve our program and administrative policies by updating, simplifying, and advancing policy to make our programs more responsive, less burdensome, and easy for our employees to apply consistently. For example, Priority Question #9 will examine whether potential program simplification can reduce burden for claimants and beneficiaries while maintaining program integrity. We will continue to improve the management of our programs and projects by implementing quality standards and using proven project management techniques.

> **❾ PRIORITY QUESTION**
>
> *What are the effects of simplifying administrative rules and requirements on reducing the burden on program participants and supporting program integrity?*

Expanding our ERM program, project management, and data science capabilities will help us better anticipate and prepare for challenges in our operating environment. We will use data analysis to drive smart and accurate business decisions and mitigate risks. We will continue to create agency spaces that address our employee and business needs, now and into the future. Additionally, we are building data-sharing partnerships to help us better manage our workloads and resources, obtain evidence-based data to inform policy decisions, simplify and improve our programs, and ensure the delivery of our vital services to all communities. For example, the answers to Priority Question #10 will help us explore collaborations with other Federal agencies and define potential projects that remove barriers to accessing needed services, remove employment barriers, and improve the administration of our programs.

> **❿ PRIORITY QUESTION**
>
> *What are the effects of improving collaboration and enhancing data sharing with external agencies on saving citizens time from reporting required information, reducing labor market barriers, improving program solvency projections, improving program administration, and reducing improper payments?*

Strategies:

Simplify our policies and modernize our processes

We will clarify our program rules for both customers and employees. Simplifying our program rules and policies will help us process benefits for our customers more quickly and make it easier for customers to complete business with us. We will remove or update outdated provisions and regularly engage internal and external stakeholders to assess and update policies. For example, we will continue to make significant progress in updating medical listings to reflect advancements in the medical industry and emerging research and consider stakeholder input.

Strengthen program and resource management

We will use proven program and project management techniques to protect taxpayer dollars and better serve our customers. We will leverage data, analyses, and program expertise to drive quicker and more accurate business decisions. We will utilize ERM best practices to manage our organizational challenges and ensure an enterprise approach in managing risks to deliver our mission. We will reassess the long-term future of agency facilities and our real property portfolio, while fulfilling workspace needs, optimizing space utilization, and achieving cost savings.

Expand strategic partnerships with external partners

We will continue partnering with other Federal agencies to promote our services and *my* Social Security through their websites and customer interactions. By taking advantage of more data exchanges with other Federal and State agencies, we will increase the accuracy of our records, improve the customer experience, and increase organizational effectiveness.

Long-term Performance Goals:

- Improve customer experience and equity in our disability programs by continuously updating our medical criteria to reflect advances in medical knowledge.

- Increase our data exchange partners by expanding outreach efforts with the data exchange community of practice and the States' data exchange community of interest.

Appendix I: Foundations for Evidence-Based Policymaking Act

The Foundations for Evidence-Based Policymaking Act of 2018 was signed into law in January 2019. The law incorporates many of the recommendations of the U.S. Commission on Evidence-Based Policymaking (2017) to improve the use of evidence and data to generate policies and inform programs in the Federal government.

The law requires the development of a Learning Agenda, an Evaluation Plan, and a Capacity Assessment of the statistics, evaluation, research, and analysis efforts. The goal is to ensure that Federal agencies generate evidence of what works in Government and use that information to improve people's lives.

Learning Agenda

The Fiscal Years 2022–2026 Learning Agenda (www.ssa.gov/data/) describes our evidence-building roadmap to support the goals described in this strategic plan. We identified 10 priority questions that correspond to our strategic plan goals. The priority questions include short-term and long-term questions related to our mission, strategic planning, and agency operations. We expect that answers to our priority questions will provide valuable information about our agency's performance and promote evidence-based decision-making.

We gathered information from internal and external stakeholders to develop our Learning Agenda. Our Evaluation Officer established a working group with two representatives from each of our 11 major offices to obtain their input and identify priority questions.

The working group compiled a list of potential priority questions based on the information gathered from internal and external stakeholders and completed a process of refining and prioritizing the questions. After consulting with agency executives, we arrived at 10 priority questions identified in this Learning Agenda:

#	Priority Question
	Strategic Goal 1 – Optimize the Experience of SSA Customers
1	What are the effects of changes to our service delivery methods on the accessibility, use, efficiency, security, and equitable delivery of our services?
2	To what extent are the Disability Insurance and Supplemental Security Income programs equitably serving and meeting the needs, including return-to-work efforts, of the population that Congress intended these programs to serve?
3	What are the key factors that influence the public's use of our online services, including the services we deliver through *my* Social Security, and what are the effects of methods to modify these key factors on our customers' decisions to create *my* Social Security accounts and use our online services?

4	What are the effects of changes to our communication methods on customer satisfaction, program integrity, and administrative efficiency?
5	Does redesigning the Social Security Statement and providing supplemental fact sheets with customized information on Social Security's programs improve people's knowledge of the programs and increase the use of internet services?
6	Does the working-age population have accurate knowledge of the Social Security disability programs, and to what extent does the working age-population's knowledge, attitudes, and perceptions of the Social Security disability programs influence the decision to pursue benefits?
	Strategic Goal 2 – Build an Inclusive, Engaged, and Empowered Workforce
7	To what extent are there systemic barriers to hiring, developing, and advancing a diverse and talented workforce and what are the effects of our Action Plan to mitigate those barriers in support of our goal to build an inclusive, engaged, and empowered workforce?
	Strategic Goal 3 – Ensure Stewardship of SSA Programs
8	What factors contribute to Federal court remands of disability decisions, and what are the effects of modifying relevant factors on the percentage of final decisions that are affirmed upon judicial review?
9	What are the effects of simplifying administrative rules and requirements on reducing the burden on program participants and supporting program integrity?
10	What are the effects of improving collaboration and enhancing data sharing with external agencies on saving citizens time from reporting required information, reducing labor market barriers, improving program solvency projections, improving program administration, and reducing improper payments?

For each priority question, we provide background information and actions we will take to answer the question.

Capacity Assessment

Our Capacity Assessment provides a baseline that we will use to measure improvements to the coverage, quality, methods, effectiveness, and independence of our evaluation, research, statistics, and data analysis. The Fiscal Years 2022–2026 Capacity Assessment (www.ssa.gov/data/) includes the following information:

1. A list of the activities and operations of the agency that are currently being evaluated and analyzed.

2. The extent to which the evaluations, research, and analysis efforts and related activities of the agency support the needs of various divisions within the agency.

3. The extent to which the evaluation research and analysis efforts and related activities of the agency address an appropriate balance between needs related to organizational learning, ongoing program management, performance management, strategic management, interagency and private sector coordination, internal and external oversight, and accountability.

4. The extent to which the agency uses methods and combinations of methods that are appropriate to agency divisions and the corresponding research questions being addressed, including an appropriate combination of formative and summative evaluation research and analysis approaches.

5. The extent to which evaluation and research capacity is present within the agency to include personnel and agency processes for planning and implementing evaluation activities, disseminating best practices and findings, and incorporating employee views and feedback.

6. The extent to which the agency has the capacity to assist agency staff and program offices to develop the capacity to use evaluation research and analysis approaches and data in the day-to-day operations.

Additional information on both the Learning Agenda and Capacity Assessment is available on our website at www.ssa.gov/data.

Appendix II: Measuring Our Progress

We have identified three Agency Priority Goals (APGs) for FYs 2022–2023. These goals are aggressive and directly support our strategic plan, specifically Strategic Goal 1 (Optimize the Experience of SSA Customers). To ensure our success in these areas, we conduct quarterly internal progress reviews and take necessary action to improve our results and reduce costs. As we approach the FYs 2024–2025 cycle, we will determine the next set of APGs.

1. Improve equity in our Supplemental Security Income program through increased outreach and improved benefit delivery, including to communities of color and underserved communities.

   - By September 30, 2023, increase the number of all SSI applications by 15 percent, relative to the 2021 baseline, restoring rates closer to pre-pandemic levels.

   - By September 30, 2023, increase the number of SSI applications from underserved communities by 25 percent, relative to the 2021 baseline.

2. Improve the customer experience by reducing the Average Speed of Answer on the National 800 Number.

   - By September 30, 2023, achieve an average speed of answer of less than 12 minutes, including implementation of estimated wait time and call back options.

3. Improve the customer experience by reducing the average processing time for initial disability claims and by prioritizing those individuals who have waited the longest for initial disability determinations.

   - By September 30, 2023, achieve an average processing time for initial disability claims of 164 days.

   - By September 30, 2023, decide 85 percent of pending initial disability claims that begin the fiscal year 180 days old or older.

Other Measurement

We monitor, track, and evaluate progress toward accomplishing our performance goals and targets on an ongoing basis. The Acting Commissioner and other agency executives review a monthly performance report, which assesses agency progress in achieving the performance targets in our Annual Performance Plan and Report (www.ssa.gov/agency/performance). We develop performance expectations at the beginning of the fiscal year and use them to assess progress throughout the year. The lead executive responsible for each performance goal provides a brief explanation for any performance that is behind expectation.

The Government Performance and Results Act, Modernization Act of 2010 (P.L. 111-352) requires agencies address Federal Cross-Agency Priority Goals in Agency Strategic Plans and Annual Performance Plans. Please refer to www.performance.gov for information on Federal Cross-Agency Priority Goals and the agency's contribution to those goals.

Appendix III: Assessing Our Programs

We routinely conduct studies and surveys to assess the effectiveness of our programs. Continuous assessment of the collection of program data, research, and analyses assists us in identifying strengths and weaknesses in our programs. Information from the program assessments assist us in developing strategies to address the major challenges we face and improve the day-to-day administration of our programs. We complete many of our reviews annually while others may be one-time efforts. The following charts describe some of our significant assessments and the timeframe for completion.

Assessment	Description
Overall Programs Evaluation	
Annual Evaluation Plan (Annually)	As required by the Foundations for Evidence-Based Policymaking Act of 2018, we developed a FY 2023 Evaluation Plan that describes our program evaluations to support our FYs 2022–2026 Agency Strategic Plan or to lay the foundation for our FYs 2022–2026 Learning Agenda
Strategic Goal 1 – Optimize the Experience of SSA Customers	
Prospective Client Survey (Biennially)	Queries people between ages 50 and 64 to identify service expectations and preferences of the upcoming wave of retirees.
Retirement Application Survey (Biennially)	Measures customer satisfaction with the retirement application process and identifies service expectations and preferences for future service among recent retirees.
Evaluation of the Ticket to Work and Other Employment Support Programs (Continuously)	Examines employment patterns and outcomes of disabled beneficiaries, including those beneficiaries who use employment services such as the Ticket to Work, Partnership Plus, and Work Incentives Planning and Assistance programs. We completed an independent 10-year evaluation of the Ticket to Work (TTW) program in 2013, which produced seven reports. Since 2013, we have transitioned to evaluating TTW and other employment support programs through internal research, funding collaborative and external research through our Retirement and Disability Research Consortium, and other grant programs.

Strategic Goal 2 – Build an Inclusive, Engaged, and Empowered Workforce

Federal Employee Viewpoint Survey (Annually)	Assesses employee perspectives of organizational performance across several major human capital areas: recruitment, development, performance culture, leadership, job satisfaction, and personal work experiences.
Human Capital Evaluations (Annually)	Monitors and evaluates how well human capital policies and programs support our mission accomplishments. This evaluation is a critical step in assessing organizational performance and determining how to improve processes. Our Human Capital Evaluation System also helps leadership assess the impact of human capital strategies designed to achieve agency goals.
Management Directive 715 Report (Annually)	Provides the status of our efforts to establish and maintain effective equal employment affirmation actions programs under Section 715 of Title VII of the Civil Rights Act of 1964 and effective affirmation action programs under Section 501 of the Rehabilitation Act of 1973.

Strategic Goal 3 – Ensure Stewardship of SSA Programs

Federal Information Security Modernization Act Report (Annually)	Reports to Congress whether our overall information technology security and privacy programs and practices comply with the Federal Information Security Modernization Act of 2014.
Department of Homeland Security (DHS) Risk Management Assessment (Quarterly)	Responds to the Office of Management and Budget (OMB) and DHS-generated DHS Risk Management Assessment as required by Executive Order 13800 and outlined in OMB Memoranda M-17-25 to provide an assessment of risk for each agency based on information submitted by agencies for the Federal Information Security Management Act Chief Information Officer metrics, which leverage the National Institute of Standards and Technology Cybersecurity Framework.
Pre-Effectuation Review of Disability Determinations (Annually)	Assesses the accuracy of disability determination services (DDS) initial and reconsideration adult disability allowances as required in the Social Security Act.
Safeguard Security Report (Annually)	Provides examples of our policies and procedures to demonstrate how we safeguard personally

	identifiable information and Federal tax information. We submit this report to the Internal Revenue Service (IRS) on an annual basis.
Safeguard Review (Triennially)	Evaluates the use of Federal tax information and the measures we employ to protect this information. This review is an onsite evaluation completed in collaboration with the IRS.
Annual Report of the Board of Trustees of the Federal Old-Age and Survivors Insurance and Federal Disability Insurance Trust Funds (Annually)	Reports annually to Congress on the financial and actuarial status of the two Social Security trust funds.
Annual Report to Congress on Medical Continuing Disability Reviews (Annually)	Provides summary information on medical continuing disability reviews (CDR) conducted for a completed fiscal year. The report includes actuarial estimates of the net Federal lifetime benefit reductions in Old-Age, Survivors, and Disability Insurance, SSI, Medicare, and Medicaid benefits resulting from the reviews conducted during that fiscal year.
Report on Supplemental Security Income (SSI) Non-medical Redeterminations (Annually)	Provides summary information on non-medical redeterminations of SSI recipients conducted for a completed fiscal year.
Bipartisan Budget Act of 2015 Section 845(b) Report (Annually)	Provides summary information on work-related CDRs conducted for a completed calendar year.
Annual Report of the SSI Program (Annually)	Reports annually to the President and Congress on the status of the SSI program and provides 25-year projections of program participation and costs.
Enumeration Accuracy Report (Triennially)	Reports the accuracy of Social Security numbers assigned during the fiscal year.
Evaluation of the CDR Enforcement Operation Predictive Model (Annually)	Evaluate the results of a predictive model used to score work issue CDR cases to ensure that we prioritize and work cases most likely to result in overpayments. Our tracking and evaluation each year indicate the need for improved coordination with the processing centers in reviewing cases based on the scores' priority order.
Targeted Denial Review (Annually)	Assesses the accuracy of reconsideration disability denials made by the DDS.

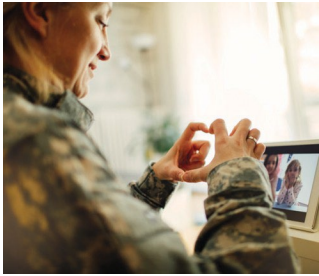|	
Retirement, Survivors, and Disability Insurance Stewardship Review (Annually)	Measures the accuracy of payments to persons receiving Social Security retirement, survivors, or disability benefits by reviewing all non-medical factors of eligibility and entitlement.
SSI Stewardship Review (Annually)	Measures the accuracy of payments to persons receiving SSI benefits by reviewing all non-medical factors of eligibility and payment.
SSI Transaction Accuracy Review (Annually)	Reviews non-medical aspects of eligibility to evaluate the adjudicative accuracy of SSI initial claims, redeterminations, and limited issues to ensure compliance with operational policy.
Retirement, Survivors, and Disability Insurance Transaction Accuracy Review (Triennially)	Reviews non-medical factors of eligibility to evaluate recently processed retirement, survivors, and disability insurance claims to ensure compliance with operational policy.

Appendix IV: Communications and Outreach

In developing this strategic plan, we engaged and consulted with various internal and external stakeholders regarding our focus areas over the next five years. Our internal management engagement included discussion with senior leadership and the National Council of Social Security Management Associations. We engaged our employees through several workgroups, solicited for input through email, conducted internal briefings and held discussions with our three unions: American Federation of Government Employees, National Treasury Employees Union, and International Federation of Professional and Technical Engineers.

For external stakeholder engagement, we held briefings with advocate groups that represent a wide variety of claimants, including tribal, the under-served, and communities of color. The advocates provided constructive feedback on how we can better implement our Agency Strategic Plan. We also briefed the Social Security Advisory Board on our priorities and high-level framework. We used our work on the agency's Learning Agenda to seek feedback from the public. We also had discussions with members of Congress and their staffs.

As we implement this plan, we will continue our outreach to appropriate stakeholders and engage with both external and internal audiences, particularly our employees. We will continue to report progress on our activities and collect ideas and feedback to improve our services.

We will also continue to engage the public through Social Security's blog and website, social media such as Facebook and Twitter, and our mobile presence. Through these platforms, we will share information and provide opportunities for collaboration and participation with our customers.

Securing today
and tomorrow