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OCCUPATIONAL INFORMATION DEVELOPMENT

ADVISORY PANEL

FINAL TELECONFERENCE MEETING

JUNE 4, 2012

SOCIAL SECURITY ADMINISTRATION

WASHINGTON, D.C.

* * * * *

DR. MARY BARROS-BAILEY

CHAIR

1 P A R T I C I P A N T S

2 MARY BARROS-BAILEY, Ph.D., Chair

3 JOHN W. CRESWELL, Ph.D.

4 ROBERT T. FRASER, M.D.

5 PAMELA L. FRUGOLI

6 SHANAN GWALTNEY GIBSON, Ph.D.

7 THOMAS A. HARDY, J.D.

8 JANINE S. HOLLOMAN

9 H. ALLAN HUNT, Ph.D.

10 TIMOTHY KEY

11 DEBORAH E. LECHNER

12 ABIGAIL T. PANTER, Ph.D.

13 JUAN I. SANCHEZ, Ph.D.

14 DAVID J. SCHRETLEN, Ph.D.

15 HONORABLE ANDREW E. WAKSHUL

16

17 C O N T E N T S

18 ITEM:

19 -----

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P R O C E E D I N G S

1
2 OPERATOR: Good morning, ladies and
3 gentlemen and welcome to the final meeting of the
4 Occupational Information Development Advisory Panel
5 of the Social Security Administration. As a reminder
6 today's conference will be recorded. At this time I
7 would like to turn the call over to your host,
8 Ms. Debra Tidwell-Peters.

9 Please go ahead, ma'am.

10 MS. TIDWELL-PETERS: Thank you. Good
11 morning, everyone. And we are sorry for the delay,
12 but we are ready to begin.

13 Welcome to the final public meeting of the
14 Occupational Information Development Advisory Panel.
15 My name is Debra Tidwell-Peters, and I am the
16 alternate Designated Federal official for the Panel.
17 To ensure we have a quorum I will now do a roll call
18 of the members.

19 Mary Barros-Bailey.

20 SPEAKER: Here.

21 MS. TIDWELL-PETERS: John Creswell.

22 SPEAKER: Here.

1 MS. TIDWELL-PETERS: Bob Fraser.
2 SPEAKER: Here.
3 MS. TIDWELL-PETERS: Pam Frugoli.
4 SPEAKER: Here.
5 MS. TIDWELL-PETERS: Shanan Gibson.
6 SPEAKER: I am present.
7 MS. TIDWELL-PETERS: Tom Hardy.
8 SPEAKER: Here.
9 MS. TIDWELL-PETERS: Janine Holloman.
10 SPEAKER: Here.
11 MS. TIDWELL-PETERS: Allan Hunt.
12 SPEAKER: Here.
13 MS. TIDWELL-PETERS: Timothy Key.
14 SPEAKER: Here.
15 MS. TIDWELL-PETERS: Deborah Lechner.
16 SPEAKER: Here.
17 MS. TIDWELL-PETERS: Abigail Panter.
18 SPEAKER: Here.
19 MS. TIDWELL-PETERS: Juan Sanchez.
20 SPEAKER: Here.
21 MS. TIDWELL-PETERS: David Schretlen.
22 SPEAKER: Present.

1 MS. TIDWELL-PETERS: And Andrew Wakshul.

2 SPEAKER: Here.

3 MS. TIDWELL-PETERS: Hearing a quorum, I
4 will now turn the meeting over to the Panel Chair,
5 Dr. Mary Barros-Bailey.

6 DR. BARROS-BAILEY: Thank you, Debra. And
7 thank you all for your patience, those who are
8 attending the meeting. As you know as a FACA panel
9 all our public meetings need to be recorded for the
10 record. And so I appreciate your patience this
11 morning or this afternoon, wherever you may be.

12 Thank you to the Panel for all being
13 present at this final meeting. We have Panel members
14 from a variety of time zones all the way from the
15 Pacific through and across the pond -- Juan is in the
16 Netherlands. So I appreciate all of you in the
17 various time zones being present to the last
18 scheduled meeting of the OIDAP.

19 As those who were in attendance at the
20 OIDAP's March meeting know, the Panel was waiting
21 information from SSA at the time as to the status of
22 the Panel post the July 6, 2012 charter scheduled end

1 date because of the ongoing federal fiscal crisis and
2 SSA's decision to end the other FACA panel referred
3 to as the Future's Panel. On May 21, 2012 we
4 received a written electronic notification from
5 Acting Associate Commissioner from the Office of
6 Program Development and Research, David Weaver, who
7 will be presenting to us today that reads as follow:

8 As you know in December of 2011 the
9 Commissioner extended the charter for the
10 Occupational Information Development Advisory Panel
11 for six months. After much deliberation, SSA has
12 decided not to renew the charter that will expire on
13 July 6, 2012. We established the Panel to provide
14 independent advice and recommendations on plans and
15 activities to help us create an Occupational
16 Information System tailored for our disability
17 programs and adjudicative needs.

18 We believe your leadership, as the Panel
19 Chairperson, and the work of each Panel member has
20 helped us get closer to meeting this key objective.
21 We would like to thank you and the members of the
22 Panel for your hard work, dedication, and commitment.

1 We appreciate your tireless energy and wish you much
2 success in the future.

3 So because OIDAP had been the de facto
4 window into SSA's efforts to develop new occupational
5 information to replace the DOT in its disability
6 program, I felt it imperative to continue with the
7 scheduled public meeting so that stakeholders could
8 have the benefit of as much information as possible
9 about the project prior to the end of our service.

10 Please join me in following along in
11 today's agenda that could be found at our web site.
12 And that web site is www.ssa.gov/OIDAP. Once you get
13 to the web site you can click on "meeting
14 information," and you will see at the top of the page
15 today's agenda as well as the Federal Register notice
16 for today's meeting.

17 At the web site you will also find
18 information to past meetings, including transcripts
19 from past meetings, formal correspondence, reports,
20 and a link to the Office of Vocational Resources web
21 site, as well as the web site to the occupational --
22 excuse me, to the Office of Program Development and

1 Research.

2 For those who might rely upon the OIDAP web
3 site as a repository for information that has been
4 collected in this process over the last three and a
5 half years, I would encourage you to obtain any
6 copies of the information at this time, given as it
7 is anticipated that the web site might become
8 inactive along with the materials contained within it
9 after July 6th, as was the case with the Futures
10 Panel after it became inactive in January.

11 We are talking with SSA in terms of
12 recommendations as to a time period of continuing the
13 web site. But at this point that particular time
14 period has not been decided.

15 As we indicate at the start of each
16 meeting, the Charter of the Occupational Information
17 Development Advisory Panel, or OIDAP, was to provide,
18 and is to provide the Social Security Administration
19 with independent advice and recommendation for the
20 development of an occupational information system to
21 replace the Dictionary of Occupational Titles in
22 disability adjudication.

1 Although it is sometimes confusing to the
2 public because of the nature of our FACA charter that
3 requires us to hold all meetings where we will
4 deliberate -- to have those in public, our task is
5 not to develop the OIS itself. As our name implies,
6 our role is to provide advisory recommendations to
7 SSA as it develops the OIS.

8 At this time, please follow along with me
9 as we go through the next item on the agenda, which
10 is the Chair's report. So that means I get a chance
11 to keep on talking. Traditionally, I offer a rather
12 short, succinct Chair's report, leaving most of the
13 discussion to the subcommittee chairs, deliberation
14 among the Panel or for invited presenters. Please
15 bear with me as this report will be a bit longer this
16 morning.

17 With our initial charter in 2008, the
18 Social Security Administration brought together a
19 diverse group of professionals on the OIADP to
20 provide the Agency with advice and recommendations on
21 a task that is vital to the foundation of the
22 disability programs, the development of occupational

1 data. The challenge was defined as daunting and
2 inspiring.

3 The mix between scientific practitioners
4 from private, public, and academic sectors
5 provided -- proved to be initially challenging, but
6 ultimately brilliant. As we learned to successfully
7 work together and with SSA's Office of Vocational
8 Resources Development or OVRD, and the mission to
9 accomplish SSA's goal, having the opportunity to work
10 with a devout and dedicated group of professionals on
11 the OIDAP and OVRD was humbling.

12 The road of SSA -- that road SSA embarked
13 upon in 2008 took courage and in some ways made SSA
14 vulnerable to the mission that a foundational part of
15 its disability programs needed fixing urgently, now.
16 Without this fix the disability programs are in
17 danger of not having the most essential information
18 upon which to make individualized decisions at steps
19 four and five of the sequential evaluation process.
20 The lives of millions of Americans with disabilities
21 are affected by the use of this data every year.

22 And the inability to have updated data

1 applicable to disability evaluation in the future is
2 potentially debilitating to SSA's disability program.
3 Adhering to its decision to develop an Occupational
4 Information System specifically designed for Agency
5 use also requires commitment.

6 While the concept of occupational data may
7 seem abstract, the concrete reality is that poor data
8 is fiscally costly, potentially devastating to the
9 disability programs. For me, the commitment to
10 ensuring that new data were developed in a fair and
11 sound way is from seeing how it daily touches every
12 case on my case load or having had touched every case
13 over the last two decades.

14 But it also is personal, as some of you
15 know, that my mom's work life was cut short because
16 of a disability and she was a beneficiary of the
17 disability insurance program. Like me, the benefits
18 of these programs in the United States since 1956 is
19 not an abstraction, but a reality to many of us on
20 the Panel whether scientist or practitioner.

21 Therefore, based on the criteria SSA set
22 out within the OIGAP's three and a half years of

1 existence we provided eight formal recommendations
2 that are essential for the development of the kind of
3 occupational data SSA needs. These are data that SSA
4 identified must contain three criteria. The data
5 must be, number 1, reflective of human function;
6 number 2, representative of the national economy; and
7 number 3, legally defensible.

8 While SSA may elect to address the
9 occupational data needs of the disability programs
10 differently in the future, the results must still
11 meet the criteria that SSA has articulated.

12 I want to repeat that, while SSA may elect
13 to address the occupational data needs of the
14 disability programs differently in the future, the
15 results must still meet the criteria that SSA has
16 articulated. Therefore, we underscore the need to
17 maintain the process public, transparent and always
18 within the scientific standards the Agency developed
19 for the project.

20 At OIDAP's inaugural meeting SSA made clear
21 its emphatic need for updated and relevant
22 occupational information for SSA's disability

1 program. During the three and a half years of the
2 Panel's existence, this need has become more acute.
3 With the mounting demands, the demographic and
4 economic pressures put the disability programs under
5 given the Nation's challenging and emerging
6 realities.

7 Although OIDAP's charter ends in July, we
8 understand that SSA's mission continues beyond us.
9 As Commissioner Astrue remarked to us in 2009 and
10 recently before Congress, the fact that updated
11 occupational data is needed for SSA is a given.
12 Indeed, this kind of data is a primary source upon
13 which work capacity decisions are made in an
14 estimated 2.6 million disability claims just in 2011
15 or nearly an estimated nine million claims during the
16 OIDAP's existence.

17 These numbers are a bit mind boggling. I
18 did some research and estimated that the nine million
19 claims constitute the total populations of nine U.S.
20 States and the District of Columbia. Now, just
21 imagine the chaos created if all people in about 20
22 percent of the states within this country -- all

1 people with some sort of disability filed claims for
2 benefits and SSA found itself without a sufficient
3 primary tool to accurately determine the allowances
4 or denials. The magnitude and importance of
5 occupational data in SSA disability determination and
6 adjudication becomes evident with this example.

7 The data's importance is not limited to SSA
8 or to those 9 million people within the last three
9 and a half years. From the stakeholders engaged in
10 this process, as well as the knowledge and experience
11 of many of us on the OIDAP, we understand that this
12 data is just as desperately needed by other
13 disability systems and government and private
14 sectors, from State and Federal Workers'
15 Compensation, long term disability, supports,
16 vocational rehabilitation, family law, pension funds,
17 no fault auto, life insurance, veterans affairs, and
18 more.

19 Further afield, during OIDAP's tenure we
20 received information from other countries, such as
21 Canada and Ireland that are considering developing
22 similar systems for purposes of working with and

1 making social program decisions that affect persons
2 with disabilities. The message is clear, SSA must
3 address the task of the development of this
4 occupational data carefully, soundly, and openingly
5 to provide fair and equitable tools that will make
6 profound and lasting impact on the people -- on the
7 lives of people with disabilities, their families,
8 and society.

9 At our March meeting it was August that
10 were activities that SSA was engaged in that were
11 predecisional that we, as special government
12 employees, could not discuss because of the nature of
13 potential future contracts. In fact, SSA had a
14 request for information out at that time that was due
15 on the day of our meeting, March 22nd. It was a
16 precursor for a potential Request for Proposal that
17 was closing that day of our meeting.

18 Since March SSA has put out a cancellation
19 notice for the Request for Proposal and made a
20 decision to not renew the Panel's charter. The fact
21 that there are substantial changes going on with a
22 project in a changing -- within it since March are,

1 therefore, evident to the Panel and the public.

2 At this point I would like to introduce the
3 Acting Associate Commissioner of the Office of
4 Program Development and Research, Mr. David Weaver,
5 who will provide us with information regarding any of
6 these changes or to the initiative. David.

7 MR. WEAVER: Thank you so much, Mary. And
8 thank you for giving me a chance to talk today with
9 the Panel and with the public to hear a little bit
10 about the project and some of the updates.

11 It is true the Agency decided not renew the
12 charter, so that will expire on July 6th.

13 The Panel has been a long serving one. SSA
14 is grateful for both the Panel's commitment to public
15 service and really, also, the body of work you have
16 produced over the last three and a half year.

17 I need to acknowledge the outstanding
18 leadership of Mary Barros-Bailey.

19 Mary, you really have a terrific reputation
20 among the Agency officials involved with this
21 project.

22 In terms of staffing, Sylvia Karman who was

1 the director of OVRD, has taken a position in the
2 Office of Research Evaluation and Statistics at SSA.
3 She is going to help lead the Agency's efforts on the
4 new Disability Research Consortium. That consortium
5 is modeled on the Agency's successful retirement
6 research consortium. And it will seek to inform
7 research that improves our understanding of important
8 disability topics, including those that cut across
9 several federal agencies.

10 Sylvia has probably done more work than any
11 other single individual in moving the Occupational
12 Information System project forward, and I'm just very
13 grateful for that work. I'm also optimistic we will
14 see continued outsized contributions in the field of
15 disabilities studies from her.

16 Susan Wilschke has graciously agreed to
17 serve as the acting director in OVRD. Typically,
18 when we have met with the Panel we often give very
19 specific updates on the staffing. I think it's
20 probably just easier to say that we consider this
21 project of sufficient importance that we will put the
22 needed staff on the project to accomplish the goals.

1 So within the Office of Retirement and
2 Disability Policy there are many resources reflecting
3 social science expertise, statistical expertise, and
4 so forth. I think what you heard the last time we
5 met was David Rust was clear that he is going to make
6 resources available that will advance the project.

7 Having said that, I think we're moving into
8 what could be described as the next phase of this
9 project and that will focus on the collection of
10 data. The reality is that our Agency needs partners
11 to collect data. And earlier this year the Agency
12 did -- published the Request for Information that
13 Mary mentioned. That was to get a sense of what
14 outside contractors might be able to offer us in
15 terms of measuring the strength, vocational
16 preparation, and nonexertional requirements of
17 occupations.

18 We at the same time had many discussions
19 with federal partners to see what their capabilities
20 were in terms of collecting data. A lot of those
21 discussions are preliminary, and I certainly at this
22 point can't speak for other federal components. But

1 I think we do believe within the Agency that
2 continued discussions, notably with components in the
3 Department of Labor may bear fruit.

4 So over the summer our goals are to reach a
5 formal conclusion on partnerships that will help us
6 measure the requirements of occupation. Now, as part
7 of that process it's important not to get out in
8 front of important stakeholders, such as Congress and
9 OMB. So as those discussions continue we intend to
10 brief those important stakeholders.

11 The way that the Panel has served as a
12 source of technical advice to the Agency, in the next
13 phase of the project we will seek either formally,
14 informally technical experts from federal agencies to
15 help move the project forward. We also have a
16 capability at SSA to bring in visiting scholars to
17 contract for consultants. We also will take a close
18 look at the technical findings of the Panel's
19 subcommittees. We will hear more about that today.

20 We are also aware of the great interest in
21 the project and the large number of stakeholders. So
22 I will say that any data collection effort will be

1 documented by published technical papers. There will
2 be a real effort to make it clear how the data was
3 gathered. So let me say that's sort of a little bit
4 of a high level of where we are now.

5 In closing, I want to, again, thank the
6 Panel for their tremendous commitment to public
7 service. I think you guys have been very good
8 architects and laid the ground work for us to carry
9 the project to a successful conclusion. Thank you.

10 DR. BARROS-BAILEY: Thank you, David.

11 And at this time I would like to open the
12 floor up to the Panel for any questions of David.

13 MR. HARDY: This is Tom Hardy. May I ask a
14 question?

15 DR. BARROS-BAILEY: Sure.

16 MR. HARDY: Okay. Thank you.

17 Thank you, David. And I appreciate your
18 kind comments.

19 I know it's still pretty early in the game,
20 but I'm a little unclear about data gathering. As
21 you guys move forward with data gathering, what kind
22 of taxonomical structure do you anticipate using with

1 DOL to gather the data?

2 MR. WEAVER: Well, it's unknown at this
3 point, but I do think that we will, as a starting
4 point, look at the occupations that are in the O*Net
5 system.

6 MR. HARDY: Okay. So if you are looking at
7 the occupations in the O*Net system, will you be
8 using the underlying measurements that are found in
9 O*Net?

10 MR. WEAVER: I think there is realization
11 that O*Net is actually a -- you know, it's really an
12 impressive tool. But some of the measures in O*Net
13 are difficult for us to operationalize in a
14 disability program. So, for example, you know, the
15 measures of static strength. In O*Net the
16 occupational analyst can give you a sense of the
17 relative importance of static strengths in
18 occupation, but it's a little bit hard for us to
19 operationalize that. So I think the idea is that we
20 are going to have to collect additional data to
21 supplement other information.

22 MR. HARDY: Okay. I'm recognizing you

1 haven't determined how that's going to happen yet.
2 Would I be correct with that assumption?

3 MR. WEAVER: I think we're still in the
4 discussion phase. So no decisions have been made.

5 MR. HARDY: Okay. And then just one more
6 quick question. The way O*Net data is organized
7 right now, not talking about scaling but actual
8 aggregation into families, occupations, jobs, things
9 like that, are you anticipating using that structure
10 for data gathering and creation of your new
11 instrument? Or you will be creating a different
12 structure for the aggregation of occupations and
13 jobs?

14 MR. WEAVER: I think -- well, again, we
15 haven't completely worked this through, but I do
16 think the O*Net structure is something that is a good
17 starting point, the aggregation of jobs within
18 occupations. And O*Net has been discussed quite a
19 bit. The National Academies of Sciences report
20 really sort of left it as an open question whether
21 that provided an appropriate structure. And I think
22 some of the work we will have to do is simply

1 empirical in nature, trying to get a sense of whether
2 on key measures jobs within an occupation are just
3 too different, or their characteristics are just too
4 different.

5 MR. HARDY: Okay. Thank you.

6 DR. BARROS-BAILEY: Other questions?

7 DR. GIBSON: This is Shanan Gibson. I have
8 one.

9 DR. BARROS-BAILEY: Okay.

10 DR. GIBSON: David, can you speak to how
11 the Agency is going to facilitate and encourage
12 continued transparency with the public and other
13 constituents as this process moves forward?

14 MR. WEAVER: Well, that is a good point,
15 Shanan. And certainly, we're open to ideas and we
16 will have to give that some thought. There are a
17 couple of mechanisms where the public is very aware
18 of what we will be doing. One of those mechanisms as
19 we -- we often talk to stakeholders such as Congress,
20 OMB, and often that does result in reports that are
21 released to the public. Under technical details we
22 intend to publish any technical papers involved so

1 the public will have a sense of what we are doing.

2 But in terms of replacing the great work
3 you guys have done in sort of making this a very open
4 and public process we will have to continually think
5 about that a little bit.

6 DR. BARROS-BAILEY: Other questions?

7 DR. SCHRETLEN: Yes, this is David
8 Schretlen.

9 Dave, you -- in your comments you have
10 emphasized sort of the continuity of Social
11 Security's efforts at this point, a continuation of
12 what's been done. But I have been on this Panel for
13 three and a half years and this is very puzzling to
14 me, because I think we -- as a Panel we made it very
15 clear that we didn't think the O*Net would be a very
16 feasible route. So I just don't understand how this
17 is sort of a continuation.

18 I mean, it seems like a complete breach of
19 everything -- you know, the entire sort of momentum
20 that this Panel and SSA working together had
21 gathered. So can you think of some way in which this
22 decision on Social Security's part actually, you

1 know, sort of responds to the Panel's recommendation?
2 Because I can't -- I just can't see a way in which
3 this is responsive at all.

4 MR. WEAVER: Well, I think what I mean by a
5 continuation, I mean a continuation of really the
6 process. The Panel has to, you know, decide for
7 itself on the recommendations. What I mean by that
8 is a lot of the work that's been done by the Panel,
9 for example, their evaluation of the National Academy
10 of Sciences report I think provided a foundation for
11 good discussion. And I think if that discussion
12 needed to precede any effort to actually go to data
13 collection and testing of data collection.

14 So I see one of the roles of the Panel is
15 really just an instrument to prepare the ground work
16 and to make us aware of the issues surrounding
17 different occupational systems, including O*Net. So
18 while I know there has been some criticism of O*Net,
19 I think some of the work that you have done has
20 helped illuminate its strengths and its weaknesses.

21 DR. BARROS-BAILEY: This is Mary. I would
22 just like to add to David's question.

1 And my question was not only was it the
2 Panel's recommendation, which the Panel was only
3 agreeing with SSA and with a variety of other federal
4 sources over probably ten years leading up to the
5 Panel's existence regarding other existing sources,
6 whether they be public or private, and how they would
7 fit with the needs of SSA.

8 Have the needs of SSA changed? And it
9 isn't like we're arguing against ourselves. We
10 agreed with every review previous to the Panel's
11 existence. So has -- have the needs of SSA changed,
12 or has SSA's understanding of their needs changed?

13 MR. WEAVER: No, I don't think our needs
14 have changed. I would say that the discussion of
15 O*Net has always been are there things that could be
16 supplemented that would make O*Net suitable as a
17 possible tool. There has been a lot of discussion
18 about whether there are too few occupations in O*Net.
19 And I don't necessarily agree that everybody thinks
20 the O*Net structure is completely flawed. I think
21 the National Academy of Sciences had a more nuance
22 view of that.

1 And I think part of it is -- is not the
2 occupations in O*Net, but sort of just some of the
3 things that are measured there cannot be
4 operationalized in a disability program like ours.
5 So there is going to have to be the collection of
6 data for those occupations that would allow us to
7 administer the disability program.

8 DR. BARROS-BAILEY: So I think what you are
9 saying is what the Panel concluded, which was the
10 current structure of the O*Net without changes in a
11 variety of different ways -- which were the same
12 changes that would anticipate the development of a
13 OIS -- would need to be made in order for the kind of
14 data that needs to be collected to be collected to
15 meet the disability needs. Is that what you are
16 saying?

17 MR. WEAVER: I think I agree with that. I
18 don't think O*Net, as it currently stands, could be
19 used in our disability process. And I don't know
20 that -- and I'm not arguing that the O*Net system
21 should be changed. I'm arguing that we may need to
22 gather supplemental data for those occupations.

1 MR. HARDY: Mary, can I ask another
2 question?

3 DR. BARROS-BAILEY: Sure.

4 MR. HARDY: I promise to try not to be so
5 talkative.

6 Sir, I have another question for you. I
7 served a long time ago on the IOTF, which a decade
8 ago was a look at the O*Net as a potential source for
9 occupational information for Social Security. And
10 through that work, while I recognize the strengths
11 and weaknesses of O*Net, I do see some ways where
12 there could be some additional beneficial use of it
13 for your purposes. So I'm not saying that you are
14 going down a bad road per se. Obviously, everything
15 depends on the detail.

16 My question is more about legal
17 defensibility, because, you know, I'm the lawyer on
18 the Panel. SSA, obviously, needs a legally
19 defensible tool. Otherwise, there is massive
20 problems, as Mary eluded to in her opening remark.

21 Have you guys considered what your fall
22 back position is going to be? Because as we move

1 along it's becoming extremely clear that the DOT,
2 while not having been challenged recently, most
3 likely will be challenged in the near future. And
4 there is a -- there is a time frame here. And I'm
5 wondering have you thought from the legal
6 defensibility standpoint what is your stance going to
7 be regarding challenges to the DOT and challenges to
8 whatever system you come up with and how you are
9 anticipating responding to those challenges?

10 MR. WEAVER: We do think quiet a bit about
11 that. I'm not a lawyer, though. I will give you
12 sort of my impression. One of the things that -- and
13 we know that DOT was litigated extensively. But we
14 think -- if you are thinking about a general model
15 that could work, it would be that if SSA partnered
16 with federal agencies that were widely acknowledged
17 as experts in this area. So the kind of work that we
18 might do with other federal agencies I suspect that
19 will be viewed in a positive light rather than a
20 negative light.

21 And the details, you are right, are sort of
22 crucial and that's sort of where the work will stand

1 or fall, but I think as a general structure the
2 Federal government acknowledges where expertise is.
3 At SSA we have quite a bit of expertise in our
4 disability programs. Other federal agencies have
5 quite a bit of expertise on the occupational
6 requirements. And I think that will be acknowledged
7 and respected.

8 But as you say, much of it will hinge on
9 the details and the success of any data collection.
10 The DOT is a concern for us because it's not getting
11 any younger, and I think that creates some sense of
12 urgency on the part of the federal government and
13 Congress to address these concerns in a timely
14 manner. It is a -- it's a real concern and it's
15 something that makes us definitely want to move this
16 project forward.

17 MS. FRUGOLI: This is Pam Frugoli.

18 Is it appropriate for me to offer a
19 clarification or is this only for questions?

20 MR. WEAVER: You can clarify something.

21 DR. BARROS-BAILEY: Go ahead, Pam. That's
22 great.

1 MS. FRUGOLI: Okay. I just want to make
2 clear that there is really two taxonomies in O*Net,
3 and the occupational taxonomy, which I believe is
4 what SSA is -- has made the focus on right now isn't
5 really just O*Net. You know, it's based on the
6 standard occupational classification system, which is
7 federal government wide. O*Net just has some
8 additional detail in it. So it's really what we call
9 SOC/O*Net. And the big advantage of that is that it
10 has extensive data on employment by geography, by
11 industry, as well as by occupation.

12 So for sampling purposes that's very
13 important. I don't think -- I think the discussion
14 is still around what occupational descriptors are
15 going to be collected and those may not necessarily
16 be O*Net descriptors from what I understand. So I
17 want to make that distinction, that we're not just
18 talking about the entire O*Net. We are talking about
19 the SOC/O*Net classification system, I believe, here.

20 And there --

21 MR. WEAVER: Pam, that was a wonderful
22 clarifying comment. So you are right, O*Net is part

1 of the federal SOC system. And that is really a lot
2 of -- I think that's the right place to start in
3 terms of the occupations we look at.

4 You are right the descriptors are what
5 would be different. I think O*Net has a lot of
6 wonderful things, and it is just that some of the
7 descriptors don't line up with our ability to
8 administer a disability program. So that's really
9 where the new data collection would have to be.

10 But I think the interesting thing that's
11 brought up about that is that there is a -- there are
12 some -- there is a federal classification system.
13 O*Net is part of that. That structure is somewhat
14 flexible in that you can create -- there are major
15 groups. If necessary you can go below the six digit
16 SOC level as O*Net has done. But I like that --
17 Pam's right, there is an official sort of federal
18 structure and that has some appeal to us.

19 DR. GIBSON: This is Shanan. Can I offer
20 another question, please?

21 DR. BARROS-BAILEY: Go ahead.

22 DR. GIBSON: First, again, that's a very

1 good descriptive clarification, Pam. Thank you.

2 I would think that most members of the
3 Panel probably has much less concern regarding the
4 use of the SOC, which we have all known from the very
5 beginning would have to be how things were tied
6 together in terms of occupational taxonomy.

7 But since we have made the distinction
8 between the occupational taxonomy and the descriptor
9 taxonomy, to me, that leads to the question, David,
10 of can you tell us where the internal workings are in
11 regards to developing this internal descriptor
12 taxonomy that will be required in order to move
13 forward.

14 MR. WEAVER: I can talk a little bit about
15 that. We certainly have a lot of thought about what
16 descriptors we would be interested in. Certainly,
17 the DOT, regardless of it's age, has always been
18 thought to be deficient and things related to the
19 cognitive requirements.

20 But the initial steps -- the initial
21 descriptors that we would be interested in are those
22 we used to administer our disability programs, such

1 as strengths, vocational preparation, nonexertional
2 requirements of work.

3 But they are not -- it's not limited to
4 that. But there has been a fair bit of work inside
5 SSA and with the Panel and others about not just
6 updating the DOT in terms of modern occupations and
7 modern data, but addressing some of the -- the true
8 deficiencies of the DOT.

9 DR. BARROS-BAILEY: David, are you
10 referring to the disability evaluation constructs
11 that is basically a lot of the data that the Panel
12 provided with a lot of input from stakeholders as to
13 the kinds of things that they want to see in the new
14 Occupational Information System or occupational data?
15 Is that what you are referring?

16 MR. WEAVER: That's one of the items I'm
17 referring to. That's still under review here at the
18 Agency.

19 DR. BARROS-BAILEY: Other questions of
20 David.

21 MR. HARDY: One more clarifying question,
22 if I may, if no one else has anything.

1 David, when you talk about using the DOT
2 based descriptors, are you talking about using them
3 as they are, or are you talking about making changes
4 to things like nonexertional requirements?

5 MR. WEAVER: I think initially the focus
6 should be -- to be as consistent with what they
7 currently are as possible. Although, nothing has
8 been decided at that point, but I do think there is
9 some value in at least initially being consistent
10 with what the measures currently are.

11 Partly because those --

12 MS. LECHNER: This is -- I am sorry. Go
13 ahead, Tom.

14 MR. HARDY: I am sorry.

15 With the changes made to some of these DOT
16 descriptors, have you mapped out the process for how
17 that would be announced, implemented, tested, and
18 then worked through the system for impact?

19 MR. WEAVER: Well, the testing would be
20 whether our partners can consistently collect that
21 type of information. So we're certainly a ways off
22 from any kind of plan to implement the new data. How

1 we roll that out would be determined in the future.

2 Certainly our programs are examined so
3 closely by Congress and others that it won't be -- it
4 will be a fairly open process. But I don't -- I
5 can't say what it would be exactly at this point.
6 And also anything -- you know, a lot of the process
7 we have in the Agency in terms of regulations and
8 other things, there is a formal process for that.
9 But, again, there is -- the first part is really to
10 see if we can consistently collect this type of data.

11 DR. BARROS-BAILEY: David, what's the
12 timeline for this? That's the number one question
13 that we always have gotten in this process. Because
14 as we know people need the data, and they need it
15 yesterday. What does the change of course do to the
16 timing as anticipated for this project?

17 MR. WEAVER: Well, my hope is that it may
18 speed things up. The -- you know, any partner that
19 we engage in sort of collecting the data is not going
20 just to production. They're going to have to test
21 this. So I would imagine over the next year there
22 would -- if we can formalize some arrangements we

1 would begin testing our ability -- the ability to
2 collect this data. So the test phase would probably
3 last a year or a little bit more.

4 And then we will have to evaluate where we
5 are at that point. But should that be successful
6 then we would hope we can move somewhat quickly to
7 collect the data. So I know everybody would like to
8 know exactly when this would finish. But I think we
9 have to kind of take -- just take this in steps. So
10 the next year or so needs to be focused on our
11 ability to actually collect data that could be used
12 in our disability program.

13 DR. BARROS-BAILEY: Okay.

14 MS. LECHNER: Hi, this is Deborah. I had a
15 question for you, David.

16 MR. WEAVER: Okay.

17 MS. LECHNER: Regarding -- and you may --
18 again, we're asking questions here that you may not
19 have gotten to some of them. But with regard to the
20 actual data collection process and partnering with
21 the federal agencies that might help you, have you --
22 have there been any discussions as to whether there

1 would be any type of field job analysis, or are you
2 leaning exclusively toward having some sort of
3 interview process?

4 MR. WEAVER: Deborah, I don't think I'm
5 going to be able to give you a great answer at this
6 point. I don't -- certainly, they're different ways
7 to collect the data. O*Net has done that through
8 occupational analysts, through surveys. Other parts
9 of the federal government collect occupational
10 requirements in other matters.

11 I just -- I don't want to sort of lock us
12 into a position. So I -- rather than saying
13 something I will just -- I appreciate your concern,
14 but I just don't know at this point.

15 DR. BARROS-BAILEY: Other questions?

16 I have a couple more.

17 The project has developed scientific and
18 legal standards that it, I think, have posted to its
19 web site. Will future initiatives follow those legal
20 insights and standards that have been adopted thus
21 far?

22 MR. WEAVER: I looked at -- I looked back

1 at our page four paper on scientific standards the
2 other night that is published. And a lot of the
3 papers -- that paper is really focused on general
4 requirements in the federal government regarding
5 scientific standards, such as those put forward by
6 OMB. So they are at somewhat of a high level. But I
7 think it would be quite accurate to say that we will
8 follow the standards that are required of federal
9 agencies and that were generally outlined in our
10 paper.

11 DR. BARROS-BAILEY: So if we're looking
12 at -- into the future a modified O*Net, would then
13 SSA be developing its own context -- content in terms
14 of like taxonomy and instrumentation to be able to
15 get that information, or are we talking about
16 something less than that?

17 MR. WEAVER: I'm sorry, Mary. Tell me a
18 little bit more.

19 DR. BARROS-BAILEY: Would there be -- if it
20 is kind of a modification of -- or additional
21 information to the O*Net, would there be a specific
22 taxonomy and instrument for disability -- SSA

1 disability evaluation that would be developed
2 specific for the collection of this data?

3 MR. WEAVER: I think that's likely. If we
4 mean by -- I don't know if by instrument you mean
5 survey instrument for respondents or something
6 different. But, certainly, some mechanism to collect
7 the data will have to be developed, because currently
8 there isn't a federal agency that collects the type
9 of data that we -- we will need for the disability
10 program. So there will be instrument development and
11 evaluation.

12 DR. BARROS-BAILEY: Okay. And then the
13 usability part of this, because I'm a practitioner.
14 And so I'm very concerned about usability of
15 anything.

16 But the R&D plan has phases dealing with
17 the technical and usability of this data, and also
18 evaluating the impact in terms of the usability
19 analyses. Will that be what you are indicating will
20 be part of the technical review over the next year?

21 MR. WEAVER: Well, usability is one of our
22 key concerns, and certainly the way the DOT -- the

1 evolution of the DOT from a paper book to currently
2 the way our examiners use it with search softwares,
3 you know, it does make quite a bit of a difference.
4 We haven't sort of in this -- a little bit of a
5 change here. We -- I haven't really thought through
6 all the implications in terms of usability other than
7 we know our examiners.

8 I know there are many people who rely on
9 this occupational data. But there is no question the
10 Agency will have to have an electronic tool that is
11 very easy to use. So continued work on that.

12 DR. BARROS-BAILEY: Okay. And so that --
13 so within the usability analyses there will also be
14 an evaluation of the impact of that data?

15 MR. WEAVER: I think that will be the case.

16 DR. BARROS-BAILEY: Okay.

17 Other questions from the Panel?

18 Thank you, David. I think those are all
19 the questions. I appreciate your time in answering
20 the questions that the Panel had. I know people were
21 very curious and there were a lot of questions
22 probably from the audience as well.

1 I think it's probably important to
2 recognize or to point out that because the problem
3 gets addressed or is defined differently doesn't mean
4 the problem goes away.

5 Therefore, we urge SSA to put out as much
6 information as quickly as possible as soon as it's
7 available so that emerging solutions are known and
8 understood and that SSA has sufficiently early
9 indicators as to the usability and impact of any data
10 development factors that may ultimately be
11 detrimental to the disability program.

12 At this point I would like to turn to the
13 part of the agenda where we have subcommittee
14 reports. Because this is our last scheduled meeting,
15 I have had asked subcommittee Chairs to engage their
16 subcommittees in addressing what were the critical
17 points of consideration in the development of any
18 occupational data in any configuration, whether it is
19 with SSA, another federal agency contractors, or a
20 combination of all. If SSA were to meet the
21 essential needs of the disability program. I know
22 the subcommittees have been busy addressing this

1 request and will be offering reports.

2 As a reminder, because subcommittees under
3 FACA cannot recommend directly to an agency, only to
4 a Panel, that through deliberation then votes on
5 formal recommendations to the Agency, I have asked
6 subcommittee Chairs that if your subcommittee has any
7 recommendation that it brings to the Panel as formal
8 recommendations to identify those formal
9 recommendations as you are making -- that you are
10 making for the Panel to consider.

11 What's important to understand in the
12 process of the FACA Panel is that any of the formal
13 recommendations that comes from the Panel to an
14 Agency are formally followed by the General Services
15 Administration.

16 Because the OIDAP will not be chartered
17 beyond July 6th this provides a quandary, given the
18 provision in our operating procedures to put out to
19 the public for review any proposed recommendations.
20 Therefore, given the circumstance of time should
21 there be any formal recommendations from the Panel to
22 SSA that emerge out of this meeting, I would propose

1 that we perform a modified version of our procedures
2 where we publicize these recommendations in the
3 Federal Register and have a follow-up teleconference
4 by the end of June allowing up to one and a half
5 hours for potential open public comment along with
6 any written public comment to the recommendations
7 that we would pass on to SSA before the July 6th
8 closure date. This would seem the most expedient and
9 responsible way to ensure the public voice is heard.

10 At this point I would like to turn the
11 floor over to Deborah Lechner, who is the Job Analyst
12 Subcommittee Chair. Deb.

13 MS. LECHNER: Thanks, Mary.

14 Can you all hear me? Great. Thanks.

15 I solicited input from the Job Analysis
16 Subcommittee to create final parting comments and
17 recommendations. And I received feedback from Shanan
18 Gwaltney Gibson, Tom Hardy, Timothy Key, and Robert
19 Fraser. And I would be submitting the synthesis and
20 summary of these comments in a final report. And I
21 would like to just summarize the comments I received
22 as well as adding my own comments to this group --

1 this Panel.

2 Basically, we feel like the overriding
3 sentiment from all the subcommittee members is that
4 the job analysis process that SSA utilize regardless
5 of which federal Agency performed -- actually
6 performed the -- or collects the information is that
7 there should be some component of interview, but also
8 combined with observation and physical measurement,
9 particularly in the area of the physical demands of
10 work. And that the analysts receive training and
11 certification and have minimal qualifications to
12 perform this work.

13 We also felt that the data collected should
14 be archived in an electronic database -- kind of goes
15 without saying in today's era of technology.

16 We also felt that it's important to have
17 some sort of quality review and oversight of the data
18 that's submitted, and that the method be
19 standardized. And that there be a process for
20 combining information from multiple jobs into a
21 single occupation and some systematic way of
22 combining that information. So those are the

1 overarching comments.

2 DR. BARROS-BAILEY: Thank you, Deborah. Do
3 you or your subcommittee have any areas of formal
4 recommendations that you would like to bring to the
5 Panel that would be in the form that we consider
6 formal recommendations? And if so, I would entertain
7 a motion in this regard.

8 MS. LECHNER: Yes, I believe that each of
9 the six points that I made would be formal
10 recommendations.

11 DR. BARROS-BAILEY: Okay. If I could have
12 you state for the record in a motion what that motion
13 would be.

14 MS. LECHNER: I move that the Panel
15 consider the following formal recommendations to SSA;
16 number one, that the job analysis used to collect
17 data for the OIS should include components of
18 interview and observation and physical measurement.

19 That -- number two, that job analysts be
20 trained and certified and required to have minimal
21 qualifications to perform the job analysis for the
22 OIS.

1 That the data be maintained in an
2 electronic database.

3 That the standard -- the methodology be
4 standardized.

5 And that there should be some sort of
6 ongoing quality review.

7 And finally, that there should be a
8 standardized method for combining information from
9 multiple jobs into one occupational category.

10 DR. BARROS-BAILEY: Thank you, Deborah.

11 Do I have a second?

12 DR. FRASER: Second.

13 DR. BARROS-BAILEY: And who seconded?

14 DR. FRASER: Bob Fraser.

15 DR. BARROS-BAILEY: Bob Fraser. Okay.

16 Discussion. Any discussion?

17 DR. GIBSON: This is Shanan. I don't have
18 a problem with any of those areas. As a matter of
19 fact, I wholeheartedly endorse everything that
20 Deborah just stated.

21 However, I feel like until we hear a
22 summation of all subcommittee reports it's difficult

1 to make a formal recommendation -- or to word a
2 formal recommendation in any one area since there may
3 be significant overlap.

4 Is it possible that we bring subcommittee
5 chairs forward, our thoughts together just as Deb did
6 and identify them, and then we return to actually
7 wording direct recommendations from that point?
8 Because it's really hard to deliberate on each of
9 these as individuals.

10 DR. BARROS-BAILEY: Okay. I will -- I
11 agree with that.

12 Deborah, do you want to remove that motion
13 at this point until we have gone through all the
14 subcommittee's reports and see if there is any
15 overlap?

16 MS. LECHNER: I'm sure there would be
17 overlap, and that's fine. You know, that's fine.

18 DR. BARROS-BAILEY: And Bob, do you agree
19 to that?

20 DR. FRASER: Yeah, I do. That makes great
21 sense.

22 DR. BARROS-BAILEY: Okay. Then is there

1 anything else that you wanted to add at this point,
2 Deborah, or any of your subcommittee?

3 MS. LECHNER: I think I'm good with what I
4 just said. I'm open to other subcommittee
5 comments -- member comments if there are any.

6 DR. BARROS-BAILEY: Thank you.

7 And are there any questions of Deb before
8 we go to the other subcommittee reports?

9 DR. SCHRETLEN: Yes, this is David
10 Schretlen.

11 Deborah, I have a question. Were there
12 other recommendations to the Panel that you guys had
13 discussed and thought about but decided not to come
14 forward with?

15 MS. LECHNER: David, the only
16 recommendations I'm putting forth today are ones that
17 have been -- we have not had a formal discussion. I
18 have solicited comments and combined feedback from
19 the Panel members. So there were no comments sent to
20 me, to my knowledge, that I did not include in
21 this -- in that summary that I just gave.

22 And if I have -- some other committee

1 members feel I have overlooked their input, I
2 apologize and am open to that. I included everything
3 that was sent to me.

4 DR. SCHRETLEN: Okay. Just to be clear, I
5 didn't mean to imply with my question that there was
6 anything not brought forward. It is just that this
7 is -- this is all moving so quickly. And I
8 appreciate these recommendations, but I guess I
9 wonder, not being involved in deliberations of the
10 Job Analyst Subcommittee, whether there were other
11 topics that you guys had discussed and thought about
12 and so forth. But I gather that the answer is "no."

13 MS. LECHNER: Yes. Correct.

14 DR. SCHRETLEN: Okay.

15 DR. BARROS-BAILEY: Any other questions of
16 Deborah?

17 Okay. Thank you, Deb.

18 MS. LECHNER: Yes.

19 DR. BARROS-BAILEY: Allan is the
20 Subcommittee Chair for the Sampling Subcommittee.

21 Allan, if you would indicate your report,
22 please.

1 DR. HUNT: Thank you. Can everyone hear me
2 all right?

3 DR. SCHRETLEN: Yes.

4 DR. HUNT: Okay. Good. We have a set of
5 eight points. I will address the question of
6 possible recommendations for later consideration at
7 the end. These are our -- essentially our final
8 considerations from the Sampling Subcommittee.

9 First, we make the point that the OIS for
10 disability determination at SSA must meet four
11 essentially requirements, legally defensible,
12 scientific respectable, practical, and affordable.
13 And, of course, all these requirements must be met
14 simultaneously.

15 SSA OIS must be linkable to the other
16 national occupational employment databases through
17 the structure of the SOC. This will significantly
18 improve SSA's ability to demonstrate that particular
19 jobs are available in the national economy. And it
20 requires that the occupational taxonomy developed for
21 the OIS be defined in a way that is compatible with
22 the SOC.

1 Third, the OIS sampling strategy must
2 provide representation of all jobs in the economy
3 with a known probability of inclusion in the sample.
4 If this sole sampling will likely be required for the
5 actual sample selection, that the relationship to the
6 population must always be known.

7 Fourth, the sampling frame must adequately
8 represent all sectors of the economy, particularly
9 including emerging sectors where new jobs are being
10 created. This will require periodic updating of the
11 sampling frame and a regular schedule of updating
12 occupational information.

13 Fifth, geographic diversity is important to
14 ensure that local variation in job organization and
15 employment requirements is captured. Variation, such
16 as shift work, telecommunicating and self-employment
17 must also be considered in the design of a sampling
18 strategy.

19 Six, these data will not likely be used for
20 hypothesis testing, so the design of the sampling
21 strategy is more important than the actual sample
22 size. This is because the representativeness of the

1 sample will be more critical than its variance.
2 However, the range of variation and job requirements
3 is also an important consideration for SSA. So a
4 systematic way of representing this dimension,
5 perhaps, interquartile range or some other similar
6 measure should be developed and monitored to ensure
7 the representativeness of the ultimate sample.

8 Seventh, we feel that the OccMed-Voc study
9 conducted by OVRD offers valuable insight or a
10 potential stepwise implementation of a national
11 sampling strategy. For the first time it gives us
12 insight into the actual occupations that are being
13 presented by applicants.

14 And last, the sampling strategy must
15 correspond with the data collection strategy. It is
16 essential that these two design elements are
17 neutrally reinforcing.

18 And let me just say looking forward to the
19 later discussion that we haven't had a chance as a
20 subcommittee to deliberate on these items. The draft
21 was circulated and I did receive comments from all
22 subcommittee members. My own position would be that

1 probably only number eight would rise to the level of
2 a recommendation. That would be that the sampling
3 strategy must correspond with the data collection
4 strategy. Thank you.

5 DR. BARROS-BAILEY: Thank you, Allan.

6 And consistent with the discussion that we
7 had with the Job Analysts Subcommittee report we will
8 wait to hear all of the subcommittee reports before
9 we go into deliberation, and then we will take it for
10 recommendation at that point.

11 So are there any questions of Allan or his
12 subcommittee?

13 Okay. Thank you.

14 Next, we move on to Taxonomy and
15 Instrumentation Subcommittee, Shanan Gwaltney Gibson.
16 Shanan.

17 DR. GIBSON: Yes. Good afternoon,
18 everyone. And thank you for coming and bearing with
19 us here.

20 I'm going to first directly read the
21 official report of the Taxonomy and Instrumentation
22 Subcommittee that has been approved by all members of

1 our subcommittee. Although, we cannot offer official
2 recommendations directly to the Agency, our report
3 does provide advice to the Agency regarding issues
4 related to their ongoing effort to develop an
5 Occupational Information System.

6 After reading our report I'm going to
7 circle back and identify six key areas that the Panel
8 may wish to consider as appropriate more inclusion in
9 a formal recommendation or recommendations, plural,
10 depending on how others view things. So first, our
11 official report.

12 The Taxonomy Instrumentation Subcommittee
13 has had one meeting. It was a teleconference held on
14 May 18th. Our summary of activities. Realizing that
15 the Occupational and Information Development Advisory
16 Council is concluding its tenure, the most recent
17 Taxonomy and Instrumentation Subcommittee
18 teleconference was focused upon reviewing the OIDAP
19 project progress and status to date and assessing how
20 we might contribute advice and recommendations going
21 forth.

22 As a result of this meeting it was decided

1 that the subcommittee would formally articulate a
2 statement of advice to SSA as guidance toward its
3 ongoing endeavors.

4 So under advisement: For years SSA has
5 relied upon data from the Dictionary of Occupational
6 Titles that is outdated, content deficient with
7 regard to the world of work and disability
8 adjudication, psychometrically suspect and not
9 created specifically to meet SSA's needs.

10 The goal of this project has always been to
11 rectify these issues. The foundation upon which any
12 occupational information database rests is its
13 taxonomy of attributes to be measured and the scales
14 that actually measure them. And just as with
15 anything one builds if the foundation is inadequate,
16 the structure will fail.

17 Based on this the Taxonomy and
18 Instrumentation Subcommittee wishes to reiterate the
19 view that SSA must develop a taxonomic content model
20 that is strong enough to withstand legal challenges.
21 The required taxonomy must comprehensively measure
22 the world of work and those attributes applicable to

1 disability adjudication.

2 We believe it is essential that oversight
3 of this be carried out by SSA project team members
4 within OVRD who have spent recent years researching
5 these various criteria and are most knowledgeable in
6 this realm. We recommend that the scales -- excuse
7 me. We recommend that the scales used to measure
8 these attributes be absolute, cross job relative, and
9 psychometrically sound.

10 Although time is of the essence, getting
11 the taxonomic foundation right and pilot testing
12 SSA's instrument are necessary to ensure both
13 scientific legitimacy and legal defensibility. SSA
14 will not achieve criterion validation of data without
15 both content and construct validity.

16 The Taxonomy and Instrumentation
17 Subcommittee further advises that SSA use multiple
18 methods of data collection, including not only
19 questionnaires and interviews but also direct
20 observation in order ensure the validity and legal
21 defensibility of the occupational information system
22 that is produced.

1 Similarly, the sources of data must be
2 contemplated by SSA regardless of who is consulted;
3 incumbents, supervisors, job analysts, direct
4 knowledge of the work, motivation to collect accurate
5 data, and training with the measurement instrument
6 are all essential. The use of trained job analysts
7 interacting with incumbents and direct supervisors
8 are most likely to meet SSA's needs.

9 In order to ensure these criteria are met,
10 SSA needs to avoid any temptation to take short cuts.
11 That while a penny smart would ultimately be a pound
12 foolish and could once again result in SSA being
13 relegated to using data that are not designed and
14 collected specifically for its needs.

15 External oversight, including peer review,
16 should also be sought by SSA to ensure scientific
17 integrity. Failure to fully contemplate the
18 scientific veracity of the occupational taxonomy,
19 data collection instrument, sources of data, or data
20 collection methods will make SSA vulnerable to
21 legitimate litigation.

22 The Taxonomy and Instrumentation

1 Subcommittee hopes that SSA will keep the proceeding
2 front and center as this project moves forward. We
3 look forward to contributing to SSA's efforts in any
4 manner appropriate.

5 So that concludes the actual official
6 report. From that report you can likely deduce six
7 areas that I believe are worthy of discussion going
8 forward and may rise to the level of making formal
9 recommendations regarding.

10 The first is that a taxonomic content model
11 that comprehensibly measures the world of work and
12 attributes applicable to disability adjudication is
13 highly important.

14 The taxonomic attributes need to be
15 measured using scales and measures that are absolute,
16 cross job relative and psychometrically sound. This
17 one is very important to me, having heard what
18 Associate Commissioner Weaver said about utilizing
19 what currently exists, at least in the initial
20 future, which we know is not psychometrically sound
21 and is not cross job relative.

22 The multiple methods of data collection,

1 subject matter experts with direct knowledge of the
2 work, motivation, and training.

3 Integration of a period of pilot tested
4 methods of peer review and ongoing quality review
5 into the project seemed to be evolving as areas of
6 agreement, and utilization of staff trained and
7 experienced in the scientific design of research and
8 disability adjudication.

9 And that's everything on this end.

10 DR. BARROS-BAILEY: Thank you, Shanan.

11 I would ask the Panel if they have any
12 questions of Shanan.

13 And, Shanan, you were talking really
14 quickly. I was trying to write them down. Could
15 you -- well, we will come back around after we get
16 through all the subcommittee reports, and ask you to
17 rearticulate because it sounds like there is overlap
18 with Deborah's.

19 DR. SCHRETLEN: Also, excuse me, Mary, this
20 is David.

21 Shanan, I wonder if what -- maybe now and
22 when we circle back -- a couple of those I wonder if

1 you could sort of reframe them as recommendations
2 rather than saying that something is important.

3 DR. GIBSON: We absolutely can. I simply
4 didn't want to frame them as recommendations until I
5 heard what all the other committees had.

6 For example, the -- Deborah brought up the
7 idea of ongoing quality review, which I felt actually
8 fits very nicely with our discussion earlier of peer
9 review and pilot testing. So I integrated that back
10 in. So, I mean, that's one of the reasons they're
11 not at this point done.

12 DR. BARROS-BAILEY: Okay. Any other
13 questions of Shanan?

14 Okay. I will move on to Janine Holloman
15 who is the Chair for the User Needs and Relations
16 Subcommittee. Janine.

17 MS. HOLLOMAN: Thank you, Mary.

18 There have been no formal meetings held
19 during this reporting period. But there have been
20 two presentations this reporting period for the
21 National Association of Disability representatives in
22 April, and the Michigan Association of Rehabilitation

1 Professionals earlier this month.

2 It has been our pleasure and privilege to
3 serve as Panel members and to serve on the
4 subcommittees. We have focused on the transparency
5 of the project and ensuring that all stakeholders are
6 given factual and consistent information as the OIS
7 project has moved forward.

8 The quarterly public meetings have been
9 instrumental in keeping all stakeholders informed of
10 the project's activities. And the public comment
11 period has offered the opportunity for any interested
12 person or group to have input -- input into the
13 process and the decisions in the project to date.

14 As SSA now moves forward independently, we
15 would respectfully request that the project team
16 implement the following directives. And we can talk
17 about whether or not we would like these as a formal
18 recommendation -- that the official quarterly --
19 number one, the official quarterly project manager
20 report -- project management reports be publicized.

21 Number two is the project web site be
22 updated minimally quarterly.

1 Number three, that SSA holds regular
2 teleconferences via Skype or some other means with
3 question and answer times made available with the
4 meeting hosted by the project chair and/or the lead
5 scientist.

6 Number four, when the research projects are
7 completed the findings are made available, allowing
8 for the peer review essentials for the process.

9 Number five, that any Federal Registry
10 announcements or publications regarding the project
11 must be processed -- must be published on the project
12 web site.

13 Number six, that SSA needs to maintain an
14 official repository for public comments on the
15 project web site and that all public comment be
16 available for review.

17 Number seven, that SSA make public a formal
18 procedure regarding their plan testing and
19 implementation of the actual job analysis instrument,
20 including information regarding data collection, data
21 analysis, and any opportunities available for experts
22 outside of SSA who assist in information gathering

1 and/or the processing of the findings.

2 And finally, that SSA considers the use of
3 focus groups to assist in the review of procedures,
4 analysis, implementation, and other issues as the
5 project moves forward.

6 Thank you.

7 DR. BARROS-BAILEY: Are there any questions
8 of Janine and/or her subcommittee?

9 Okay. At this point I would -- and I just
10 want to call attention to the fact that it is --
11 depending on the time zone where you are -- it is
12 about 20 minutes to the two hour mark. I believe we
13 need to understand that we will likely go beyond that
14 time at this point, because likely we won't have
15 deliberations completed within the next 20 minutes,
16 but we will try.

17 So I will open up the discussion at this
18 point. It sounded like there was quite a bit of
19 overlap particularly between the Job Analysts
20 Subcommittee and the Taxonomy Subcommittee, and that
21 Allan's one recommendation that he believe rose to
22 the level of deliberation with the Panel would kind

1 of dovetail with at least number three from Shanan in
2 terms of data collection.

3 And in terms of transparency from User
4 Needs it needs to be along two different avenues; one
5 of them basic information to and about the project.
6 And the other one in terms of publicizing the
7 technical findings of the actual delivery of the data
8 collection -- excuse me, data -- occupational data
9 development, collection, and the phases of the
10 project.

11 So at this point I'm going to come back to
12 Shanan because you said your recommendations seemed
13 to have others fold into those. And maybe start
14 there as an anchor and then ask Deb, Allan, and
15 Janine to see whether the content of your
16 recommendations fold into or supplement those
17 recommendations that Shanan would bring forward.

18 I also would like you to make sure that as
19 we go through this process we understand them in the
20 context of the recommendations we have already made
21 to SSA to see whether they are formal recommendations
22 that add to those or are different from those.

1 And so, Shanan, if you would rearticulate
2 your six points from a recommendation standpoint, and
3 then maybe we could go into a formal motion.

4 MS. LECHNER: Mary. This is Deborah
5 Lechner.

6 I have a recommendation in terms of process
7 or a request in terms of process. I think it is
8 extremely difficult to consolidate all of our
9 recommendations on a conference call. What I would
10 recommend is that someone at SSA, whoever is in
11 charge of providing a transcript of this meeting
12 provide the comments from the subcommittee Chairs
13 that have just been articulated in writing to the
14 Panel subcommittee Chairs. And that -- or the entire
15 subcommittee, depending on process or how you want it
16 done, but that we get these comments in writing or we
17 make some attempt -- or someone takes leadership in
18 consolidating recommendations, because I think it's
19 unrealistic to do this process on the phone.

20 DR. BARROS-BAILEY: I took that idea and
21 that was how the draft that you have for our final
22 report in terms of -- hopefully you got a copy of

1 that -- in terms of page nine where it talks about
2 the future, and it starts with "a purpose" is I tried
3 to subsume into that summary all of the draft reports
4 that I received moving forward. So maybe that might
5 be a way to start this process.

6 MS. LECHNER: Yeah. I think it would be an
7 excellent approach, and that we -- then we can
8 provide written comment. Because I think it's very
9 difficult to do that kind of work on the phone.

10 DR. BARROS-BAILEY: Okay. Unfortunately,
11 we don't have the luxury of having a face-to-face
12 meeting between now and when we sunset on July 6th.
13 So given that we were provided the information by SSA
14 on May 21st indicating that we would be sunseting,
15 I think we have to go with what we can. We don't
16 have a lot of luxury of time.

17 And so maybe we -- I can direct the Panel
18 to look at pages 11 -- starting at 11 in the draft
19 final report where we talk about transparency. Those
20 recommendations they are directly from Janine's
21 report in terms of publicizing reports, announcing
22 all future strategic research and developed plans,

1 promoting a venue for public comment, engaging
2 stakeholders in the scientific community were
3 generally where I saw the bulk of the recommendations
4 going from User Needs.

5 And within -- I would ask maybe Janine
6 to -- and the subcommittee to see if that is where
7 you believe the recommendations fall. And the other
8 subcommittee Chairs and subcommittee members that --
9 anything that you recommended that had to do with
10 transparency, whether it is about the project or
11 specific to the development and implementation of
12 occupational data as it relates to Social Security's
13 needs if that would be represented within that
14 language. And I will go ahead and read the language
15 for those listening in who might be interested.

16 And the question is in terms of the advice
17 that we got from User Needs, publicizing reports from
18 OVDR leadership on the project's activities including
19 continued updates regarding the progress with the
20 initiative and strategic goals on Agency web sites
21 and in public forum webinars, informational sessions,
22 advertising in the Federal Register and Agency

1 sources.

2 Two, announcing all future strategic
3 research and development plans, as well as findings
4 from the project development and data collection to
5 researchers from peer review.

6 Three, continue to promote a venue for
7 public comment, and a repository for such comment.

8 And four, engage stakeholders in the
9 scientific community through the review of research
10 and development, as well as analysis, usability and
11 integration of occupational data into disability
12 adjudication process.

13 DR. SCHRETLEN: Mary, this is David. I'm
14 trying to understand that if this Panel is to make
15 some kind of final recommendations to Social Security
16 it would be in this format. That is through this
17 final report, is that right?

18 DR. BARROS-BAILEY: Yes. But for them to
19 be formal recommendations that are formal
20 recommendations within the FACA structure it would be
21 something beyond basic advice. It would be something
22 that we would have to have as a formal motion, a

1 seconded discussion on it, voting on it, and be a
2 general formal recommendation. And it could be
3 publicized in print, but we do have to go through the
4 process as a FACA panel.

5 DR. GIBSON: Mary, this is Shanan.

6 I have got -- I have taken my six and
7 basically brought them down into three that is worded
8 as recommendations. Why don't you let me take a shot
9 at throwing them out there and see what bounces off
10 of them and add to them.

11 DR. BARROS-BAILEY: Okay.

12 DR. GIBSON: That might help.

13 First one, Panel recommends that SSA pursue
14 development of a taxonomic content model that
15 comprehensively measures the world of work and those
16 attributes applicable to disability adjudication and
17 measures these attributes using scales and measures
18 that are absolute, cross job relative and
19 psychometrically sound. That's one. It does build
20 off an earlier recommendation that is more specific,
21 I believe.

22 Number two, the Panel recommends that

1 subject matter experts with direct knowledge of the
2 work, motivation to collect accurate data, and
3 training with the measurement instrument utilize
4 multiple methods of data collection including not
5 only questionnaires and interviews, but also direct
6 observation. This goes to Deb's information on using
7 trained job analysts and that we have people who know
8 the job.

9 And then the third one I have been trying
10 to work transparency into, but I haven't quite got
11 the wording yet. But the panel recommends that
12 integration of periods of pilot testing, method of
13 peer review, and ongoing quality review are
14 systematically built into SSA's development of an
15 Occupational Information System.

16 DR. BARROS-BAILEY: For the rest of the
17 Panel and the other three subcommittee chairs, do
18 those three reworded potential recommendations seem
19 to integrate your information? I think I heard
20 everything except for possibly Allan's in there.

21 DR. GIBSON: No, I did not even get a --
22 take a shot at Allan's. I did not.

1 DR. HUNT: This is Allan, I'm a little bit
2 in a quandary. I appreciate what you are doing,
3 Shanan. As was earlier mentioned by Deborah it's
4 kind of hard to do this on the fly.

5 MS. LECHNER: Yeah. I can't do this on the
6 fly. I'm just going to decline to comment, because I
7 can't do this on the fly. You know, I would rather
8 just leave what we have. I think we have all over
9 the course of the several years -- I don't hear
10 anything, you know -- respectfully, I think that all
11 of our comments are valid, every single one of them.
12 But I don't think this is anything that we have not
13 said before.

14 DR. GIBSON: I absolutely do not disagree
15 with Deb. My concern is that, although we said them
16 in deliberation, and we said them before I feel it's
17 vitally important that we go on the record saying
18 that these are things that SSA should do, but if they
19 choose not to it is never any question of what was
20 recommended.

21 MS. LECHNER: Well, if we are going to do
22 this then -- and if you want my input I decline to

1 provide input unless I see something in writing,
2 other than what Mary has already put together that
3 seems to, in general, cover the scope. But I
4 can't -- this is not -- I don't want to be on the
5 record as having approved recommendations that I
6 really -- it's hard for me to really do this without
7 seeing them in writing.

8 DR. BARROS-BAILEY: Deb, do you have the
9 report before you -- the final report?

10 MS. LECHNER: I do.

11 DR. BARROS-BAILEY: Okay. Look at page 12.
12 I think that it includes -- again, I tried to take
13 what I saw coming from your subcommittee, Shanan's
14 subcommittee and Allan's subcommittee, and what I
15 read earlier was on transparency. But I have
16 something under the science that might also include
17 all the information that we are talking about here.
18 Let's see if that works.

19 MR. HARDY: May I ask a question, Mary?
20 This is Tom Hardy calling -- or speaking. Can you
21 hear me?

22 DR. BARROS-BAILEY: Yes.

1 MR. HARDY: I'm hearing everything that's
2 going on, and my question is we remain in existence
3 until July 6th.

4 DR. BARROS-BAILEY: Correct.

5 MR. HARDY: There has been discussion of
6 having one final teleconference sometime in the
7 future. Is it possible for us at this meeting to
8 schedule one more teleconference, and in the interim
9 try and sort these recommendations out, and then
10 convene one more time, and then have a vote at that
11 time? Or is that not going to be practicable.

12 DR. BARROS-BAILEY: As I indicated at the
13 beginning, we have -- according to our operating
14 procedures if we come up with formal recommendations
15 we have to put them out in terms of the formal
16 Federal Register so that the public has an
17 opportunity to have input into that process. So what
18 I have proposed was that if we had formal
19 recommendations arising out of this meeting that we
20 have another teleconference, but we have it open to
21 public comment --

22 MR. HARDY: On the recommendations.

1 DR. BARROS-BAILEY: You know, the five
2 minutes, ten minutes where we listen and have input
3 from the public and take it to a final vote. But
4 that assumes we have something out there that the
5 public is responding to.

6 Because of the sunseting of the Panel on
7 July 6th we just don't have the time at this point to
8 be able to work on this further because of the timing
9 of this.

10 So let me go ahead and direct everybody to
11 look at page 12 that I think might have subsumed the
12 information that we have coming in from the other
13 subcommittees. And it starts that we affirm our
14 belief that, number one, the taxonomy must
15 comprehensively measure the world of work and those
16 attributes applicable to disability adjudication.

17 Two, internal staff trained and experienced
18 in the scientific design and research and also in
19 disability adjudication application must work
20 together in this process.

21 Three, the scales used to measure these
22 attributes must be absolute cross relative and

1 psychometrically sound.

2 Four, the occupational data must link to
3 other national occupational information databases
4 through the structure of the standard occupational
5 classification. A criteria that is important to a
6 carefully designed sampling strategy that must be
7 encompassed -- that must encompass all jobs in the --
8 it should say national economy. And it says, the
9 OccMed-Voc Study conducted by OVRD offers a good
10 starting place.

11 Five, the sampling frame must adequately
12 represent and -- all and geographically diverse
13 sectors of the economy, including emerging sectors be
14 periodically updated and correspond to the data
15 collection strategy.

16 Six, data collection modes, points of
17 contact in the training and experience of those
18 involved in data collection is a vital step to the
19 development of data. Thus, SSA should pay special
20 attention to this phase of the project, particularly
21 to the qualifications and training of field job
22 analysts, an area that represents the greatest threat

1 to the validity of the data.

2 Seven, SSA should test the resulting data
3 with users for comparability and decision making
4 effect.

5 Eight, SSA should periodically update the
6 data to remain relevant and reflect the world of work
7 in the United States.

8 So those were the points at a higher level
9 that I derived from the subcommittee reports. This
10 is probably more than what we need if the Panel
11 believes that to be. But that's kind of the
12 constellation of information that I derived. So it
13 would be going back to the Panel in terms of the two
14 general areas that we're talking about. One is more
15 dealing with transparency and public engagement. The
16 other one is more dealing with the technical and
17 scientific aspect of the project in terms of are
18 there recommendations coming from the Panel.

19 MS. LECHNER: Mary, what -- I would like to
20 move that we consider using pages nine through 15 --
21 I'm sorry, actually, nine through -- I am sorry, nine
22 through 14 that you have already written in terms of

1 the future in your building the foundation report,
2 just to use those as the recommendations to SSA going
3 forward. Because at a high level I think they
4 reflect everything that's been said on this call.

5 DR. GIBSON: I would like to offer one
6 editorial change that it needs to say "cross job
7 relative" and not just "cross relative. "

8 DR. BARROS-BAILEY: Okay. I apologize.

9 HONORABLE WAKSHUL: This is Andy.

10 I think that's a really good suggestion.
11 If we can't get a two week extension or something
12 from the Commissioner so that the July 6th date
13 doesn't come up against us, that might accomplish
14 what we are trying to do here.

15 DR. BARROS-BAILEY: Okay. We have a motion
16 made by Deborah that the pages -- was it nine through
17 14 or 10 through 14?

18 MS. LECHNER: I believe nine through 14,
19 Mary.

20 DR. BARROS-BAILEY: Nine through 14.

21 DR. SCHRETLEN: Before considering that
22 motion or a second, can we deliberate, Mary?

1 DR. BARROS-BAILEY: Well, we have to
2 deliberate after we have a motion on the floor. So I
3 need to have a motion. I need to have a second.
4 Then we go into deliberation.

5 DR. SCHRETLEN: Okay.

6 DR. BARROS-BAILEY: That's why I fell back
7 to what the motion was.

8 MR. HARDY: This is Tom Hardy.

9 I would like to second the motion and open
10 it up for discussion at this time.

11 DR. BARROS-BAILEY: Okay. So now we are in
12 deliberation. Go ahead, David.

13 DR. SCHRETLEN: So, Allan, one of the
14 things I wondered is you -- you know, we had
15 discussed a number of issues in the Sampling
16 Subcommittee. But at the end of the day you are
17 saying you thought maybe just a single
18 recommendation, the final one. Could you share a
19 little bit about why you don't want to present to the
20 Panel as a whole the other matters?

21 DR. HUNT: Yes, I would be happy to. I was
22 just feeling that the -- essentially the operational

1 issues or details are best left to the discussion of
2 whoever is designing the sampling strategy. And
3 that, therefore, raising those to the level of
4 recommendations might tie somebody's hands in the
5 future. So that -- and I wanted -- I don't think I
6 said this, but I wanted specifically to leave this to
7 other subcommittee members to comment on. But that
8 was just my first cut.

9 MS. FRUGOLI: This is Pam Frugoli. I would
10 note that I believe points four and five in this
11 summary report are from the Sampling Subcommittee
12 report, and so would actually go beyond that one
13 recommendation. And I -- I think that they're good
14 recommendations, but I defer to the --

15 DR. HUNT: I would agree. I did not see
16 the report until this morning. I did not get the
17 Friday copy for some reason. So I have not seen
18 that.

19 I like Deborah's motion. I am not sure we
20 want to go all the way back to page nine. It seems
21 to me the actual recommendations are on 11 and 12,
22 but I could stand corrected.

1 Let me just say that I think the advantage
2 to adopting Mary's translation, if you will, of the
3 recommendations is essentially, Deborah, what you are
4 asking for. It gives at least one person, who did
5 take the initiative, to draw this all together and to
6 rationalize it.

7 So it short circuits the process. And I
8 think we probably have had a chance to look at what
9 the content is and fit it with what the subcommittee
10 reports contain. So I would suggest a friendly
11 amendment and find that recommendation or the motion
12 to include pages 11 and 12.

13 DR. BARROS-BAILEY: Allan, would that go
14 into 13, because part of the science goes into page
15 13?

16 DR. HUNT: Oh, okay. You are right.

17 DR. SCHRETLEN: And I would like to note
18 that number four is -- it is an incomplete sentence.

19 DR. BARROS-BAILEY: Yes.

20 DR. SCHRETLEN: And I would just suggest
21 truncating it after the standard occupational
22 classification. Just say -- so that it reads, the

1 occupational data must link to other national
2 occupational employment databases through the
3 structure of the standard occupational
4 classification.

5 DR. BARROS-BAILEY: So I have called for --
6 I need to go back to the people who did the motion
7 and seconded it -- that we amend the notion to read
8 pages 11 through 13.

9 Deborah, do you agree with that amendment?
10 Deborah.

11 MS. LECHNER: Sorry. I put myself on mute.
12 It looks like -- it does look like the meat
13 of the recommendations are included in 11, 12, 13.

14 Is that the recommendation that's on the
15 table?

16 DR. BARROS-BAILEY: Yes.

17 MS. LECHNER: Yes. That sounds fine with
18 me.

19 DR. BARROS-BAILEY: And Tom, you have
20 seconded.

21 MR. HARDY: I second the amendment.

22 DR. BARROS-BAILEY: Okay. And it sounds

1 like we have two calls also for wording changes. One
2 of them of two, number four on page 12 to remove the
3 section after the standard occupational
4 classification. That starts with "a criteria" all
5 the way to "a good starting place." And also,
6 Shanan's modification in terms of making sure that it
7 says "cross job relative."

8 MS. FRUGOLI: Okay. That's in number
9 three.

10 DR. BARROS-BAILEY: Number 3, correct. Do
11 I --

12 DR. HUNT: You need a motion on those,
13 Mary?

14 DR. BARROS-BAILEY: No. I just need a
15 friendly amendment. The people who made the motion
16 and seconded it to agree to amend the motion so that
17 it reflects that.

18 So number three on page four -- I mean,
19 excuse me, page 12 would read "cross job relative,"
20 instead of "cross relative." And number four after
21 the standard occupational classification, that that
22 ends that -- that point on number four.

1 DR. CRESWELL: Yes. This is John Creswell.
2 Ending after "standard occupational
3 classification" leaves out probably what I think is
4 the most important point made by the Sampling
5 Committee, and that is the OccMed-Voc study offers a
6 good starting point for sampling.

7 I think -- I think that's where SSA should
8 begin to -- begin rethinking all of this. And I know
9 that Brian is working on that report and analyzing it
10 more carefully than what was done earlier.

11 DR. BARROS-BAILEY: So if, David, your
12 concern was that that was an incomplete sentence if
13 we add at the end of that for the OccMed-Voc study
14 that must encompass all jobs in the national economy,
15 would that complete it for you?

16 DR. SCHRETLEN: I disagree with the value
17 of the OccMed-Voc Study. So that's why I would be
18 inclined not only to make it a sentence, but just
19 truncate that part of it.

20 DR. BARROS-BAILEY: Any other discussion on
21 that?

22 MR. HARDY: I have to state as the person

1 who seconded the motion, I am in agreement with David
2 about SOC and the OccMed-Voc study.

3 DR. BARROS-BAILEY: Or deemphasizing it.

4 Okay. So in terms of the people who made
5 the motion, do you agree or disagree to the amendment
6 on number four of removing the section of the
7 paragraph that talks about a criteria that is
8 important to a carefully designed sampling strategy
9 that must encompass all jobs, and talks about the
10 OccMed-Voc study?

11 DR. HUNT: Yes, I agree with that.

12 DR. BARROS-BAILEY: So Deb and Tom, do you
13 agree to the amendment to remove that section?

14 MS. LECHNER: What section are we removing?

15 DR. BARROS-BAILEY: Everything after
16 "standard occupational classification" on number
17 four.

18 DR. CRESWELL: This is John again.

19 DR. BARROS-BAILEY: Hold on, John.

20 DR. CRESWELL: Okay.

21 MS. LECHNER: Yes, I am fine with that.

22 DR. BARROS-BAILEY: Okay. Tom.

1 MR. HARDY: This is Tom. I agree to the
2 amendment to remove.

3 DR. BARROS-BAILEY: Okay. Do we have -- is
4 there anybody else that wants to -- because we were
5 dealing with a time issue and so I want to be really
6 respectful of people who have been listening in on
7 us. And I know that we have people who are for and
8 against this. Let's go ahead and take a couple more
9 people on the Panel in terms of whether you believe
10 that that should be kept or not kept.

11 DR. CRESWELL: Well, this is John. I would
12 like to hear -- what is the argument for removing the
13 part about the OccMed-Voc study?

14 DR. BARROS-BAILEY: Okay. John, we have --
15 technically everybody is supposed to be given a
16 chance to discuss once on a particular topic before
17 anybody else on this topic. So I wanted to hear from
18 anybody else on the Panel in terms of their
19 consideration of either keeping or not keeping the
20 OccMed-Voc study part of that paragraph.

21 DR. PANTER: This is Abigail.

22 I think we should keep it. I think it is a

1 very important piece of what we have learned as a
2 Panel. And I think ignoring it is ignoring the key
3 data -- the main -- the key data we have seen from
4 SSA on this topic.

5 And unfortunately, my cell phone is going
6 to die in a second. So I will have to arrange to
7 vote at a different time if it does do that. So I'm
8 sorry if it goes out.

9 DR. FRASER: This is Bob.

10 I agree with Abigail. I think this takes
11 us back to day one. You know, I would like to keep
12 it in.

13 DR. BARROS-BAILEY: Okay.

14 HONORABLE WAKSHUL: This is Andy.

15 I would like to keep it in.

16 DR. BARROS-BAILEY: Okay.

17 MS. HOLLOMAN: This is Janine.

18 I would like to keep it in.

19 MR. KEY: This is Tim.

20 And I say keep it in as well.

21 DR. BARROS-BAILEY: Okay.

22 MS. FRUGOLI: This is Pam Frugoli.

1 And I feel that while the OccMed-Voc study
2 was informative, it was talking primarily about the
3 claimants. And it doesn't really help with
4 identifying other similar related work. So I think
5 it's limited in its value if that has any effect on
6 the consideration.

7 DR. BARROS-BAILEY: Okay. Allan.

8 DR. HUNT: I would keep all the RD's
9 OccMed-Voc study.

10 DR. BARROS-BAILEY: Okay. And Shanan.

11 DR. GIBSON: Sorry. I was saying that,
12 although, I see great value in the outcome of the
13 OccMed-Voc study, kind of building off of what Pam
14 just said I think maybe it is something separate and
15 does not belong in the same recommendation as the
16 linkages to the SOC.

17 DR. BARROS-BAILEY: Okay. Okay. So what
18 we have is most people wanting to keep it, but,
19 perhaps, at a different point. So if -- let's go on
20 and -- to number three in terms of does anybody have
21 any concerns about changing the wording to where it
22 talk abouts cross relative to -- including cross job

1 relative? That's just a typo.

2 Okay. I don't hear any concerns about
3 that.

4 So let's just quickly see if we can address
5 the issue of the OccMed-Voc study. The occupational
6 data must link to other occupational employment
7 databases through the structure of the
8 occupational -- standard occupational classification
9 becomes one. And then, perhaps, following that what
10 I'm hearing people say is that would we start with
11 the next one, a criteria that is important -- let's
12 see, a criteria that is important to a carefully
13 designed sampling strategy, must encompass all jobs
14 in the national economy, and the OccMed-Voc study
15 collected by OVRD offers a good starting place.

16 DR. SCHRETLEN: Do we -- okay. I have a
17 question about encompass and represent are very
18 different verbs.

19 DR. BARROS-BAILEY: Okay.

20 DR. SCHRETLEN: It's one thing to say that
21 we -- that the occupational database should represent
22 all jobs in the national economy. But to say that it

1 must encompass them -- every job must be in it
2 that's -- talk about tying someone's hands, that's
3 really tying them.

4 DR. BARROS-BAILEY: Okay. So your edit to
5 that would be -- your alternative to "encompass"
6 would be?

7 DR. SCHRETLEN: "Represent" rather than
8 "encompass."

9 DR. BARROS-BAILEY: I missed that.

10 DR. SCHRETLEN: "Represent" rather than
11 "encompass."

12 DR. BARROS-BAILEY: "Represent." Got it.

13 DR. GIBSON: This is Shanan.

14 Adopt a carefully designed sampling
15 strategy that represents all jobs in the -- I guess
16 it's economy whatever the last is. And the
17 OccMed-Voc study offers a good starting place.

18 DR. BARROS-BAILEY: Okay. Adopt a
19 carefully designed sampling strategy that --

20 DR. GIBSON: Represents.

21 DR. BARROS-BAILEY: -- represents all jobs
22 in the national economy. That OccMed-Voc study

1 conducted by OVRD offers a good starting place. Does
2 that sound --

3 DR. SCHRETLEN: So what is the
4 recommendation about the OccMed-Voc study? I mean,
5 there -- it's a suggestion. It's an observation.
6 But I'm not sure I understand what the recommendation
7 is.

8 DR. GIBSON: Well, that's why I started off
9 with adopt a carefully designed sampling strategy
10 that represents all jobs within the national economy.

11 DR. SCHRETLEN: And if we do that all
12 jobs -- or most jobs in the OccMed-Voc study will be
13 included.

14 DR. GIBSON: It should, yes.

15 DR. BARROS-BAILEY: Yes. It just becomes a
16 filter.

17 DR. SCHRETLEN: -- in the OccMed-Voc study.
18 I mean, there are -- there were like the 100 most
19 common, but there were an awful lot of, you know,
20 single claimants in that study who came in with a
21 particular job. Do we really want the database --
22 whoever constructs this sample to ensure that every

1 single position in the OccMed-Voc study is
2 represented or encompassed?

3 MS. FRUGOLI: We didn't want to ignore the
4 OccMed-Voc study. I think that's what the point was.
5 To not ignore it moving forward.

6 DR. SCHRETLEN: I absolutely agree with
7 that.

8 MR. HARDY: It's a starting place. It
9 doesn't say that it's binding or that every job in
10 there is -- you know, it's a good place to start.

11 DR. HUNT: Well, if things are going to be
12 run out incrementally, and if jobs are going to be
13 analyzed incrementally at least starting with -- for
14 lack of a better word -- the most popular ones, the
15 ones that claimants use the most frequently as citing
16 their job history, and for the ones that can be
17 either citing most frequently as jobs in the economy.
18 I think starting there. Again, I would rather see
19 all jobs done permanently. But if we have got to
20 roll it out, roll it out with those first.

21 DR. BARROS-BAILEY: So it reads, adopt a
22 carefully designed sampling strategy that represents

1 all jobs in the national economy, and the OccMed-Voc
2 study conducted by OVRD offers a good starting place.

3 Is everybody okay with that wording?

4 DR. SCHRETLEN: Yes.

5 DR. BARROS-BAILEY: Okay. So back to Deb
6 and to Tom. Do you are agree with a friendly
7 amendment to the motion to change four into two that
8 read as follows; number four would be, occupational
9 data must link to other national occupational
10 employment databases through the structure of the
11 Standard Occupational Classification.

12 And five, adopt a carefully designed
13 sampling strategy that represents all jobs in the
14 national economy. The OccMed-Voc study conducted by
15 OVRD offers a good starting place. Then all the
16 numbering of the subsequent recommendations change at
17 that point.

18 MS. LECHNER: Agreed.

19 MR. HARDY: I agree.

20 DR. BARROS-BAILEY: Okay. Is there
21 anything else within these three pages of 11 through
22 13 -- actually, four pages that are structured

1 between transparency and scientific components of the
2 recommendations on the table that anybody would like
3 to discuss or deliberate?

4 DR. SCHRETLEN: Where is it represented the
5 multiple methods of observation will be made for the
6 job analysts? Where is that?

7 DR. BARROS-BAILEY: That is two down from
8 what we have just discussed, after the sampling
9 strategy --

10 DR. SCHRETLEN: There it is, number six.
11 Okay.

12 DR. BARROS-BAILEY: Talks about data
13 collection modes, points of contact and the training.
14 It talks about data collection modes. It doesn't
15 just talk about a single mode. Points of contact in
16 the training and experience of those involved in data
17 collection is a vital step in the development of
18 data. Thus, SSA should pay special attention to this
19 phase of the project and particularly the
20 qualification and training of field job analysts, an
21 area that represents the greatest threat to the
22 validity of the data.

1 DR. SCHRETLEN: Okay. Now -- but it seems
2 like both Deb Lechner and Shanan talked about the
3 importance of not simply interviewing supervisors,
4 but actually making sure on-the-job observations and
5 measurements. Is that not going to be a
6 recommendation that we make to Social Security?

7 DR. BARROS-BAILEY: I am opening it up for
8 deliberation on the point that there is recommended
9 wording that would emphasize that greater than what
10 is noted in -- what is currently changed for number
11 six to number seven.

12 MS. LECHNER: From my perspective the
13 recommendations or the comments that I had -- our
14 subcommittee has about job analysis are more specific
15 than this general recommendation. But, again, I feel
16 like we have made these specific recommendations over
17 and over again for several years that there be some
18 component of job analysis and direct observation, in
19 addition to interview and subjective report of job
20 demands. So if they don't have it by now, then I
21 guess they're never going to get it.

22 DR. SCHRETLEN: I think what I was

1 responding to is both you and Shanan --

2 MS. LECHNER: I agree. We both made
3 comments about that. You know, again, how
4 specific -- our time is limited today. I have a drop
5 dead -- I have to be off the call in ten minutes. So
6 I can live with more general recommendations. From
7 my perspective I don't have to have the very specific
8 comments that the subcommittee made. These are fine.

9 I don't know what Shanan's perspective is.

10 DR. GIBSON: I -- like Deb I tend to agree
11 with the generalized. We have been saying it over
12 and over, surely they should hear it. I also think
13 it's important we get it in the recommendation. I
14 don't know what is the appropriate level of
15 specificity for the recommendations.

16 I do know that when I read this particular
17 one, the former number six now seven one, I have
18 concerns about the phrase used "points of contact."
19 Because "points of contact" is rather vague and is
20 not a phrase or a term that would be typically
21 utilized in work analysis. The phrase I utilized
22 earlier and that would be used is the subject matter

1 experts.

2 DR. BARROS-BAILEY: Okay.

3 DR. GIBSON: And so I personally would be
4 happier if we at least talked about the use of
5 subject matter experts being diverse as opposed to
6 just points of contact. But, again, I can live with
7 this if other people think that I am pushing too much
8 work analysis terminology into the general
9 recommendation.

10 DR. FRASER: This is Bob.

11 Could we have a couple days just to try
12 to -- you know, just to reconcile, you know, a final
13 time here. The report versus the points made today
14 just to see if we --

15 DR. BARROS-BAILEY: Unfortunately, for us
16 to be able to vote on this we have to be in quorum
17 and we have to be on the record. And so it isn't
18 like we can come back from this and vote on it off
19 the record.

20 MS. LECHNER: Then I say if we have to
21 make -- put together something right here right now
22 the documents that -- you know, pages 11 through 13

1 to me seem to be the most succinct communication
2 about the -- you know, our intent, what we have said.
3 It's well summarized the content that we have said
4 for the past several years. And, you know, I don't
5 think we can -- within the scope of this call I don't
6 think we can be more specific than this. If we do we
7 will end up debating on terminology and semantics for
8 hours. And you know, frankly, I don't think that
9 that is worth SSA's time or investment of resources.

10 DR. BARROS-BAILEY: Okay. And so we have a
11 motion on the floor. We have a second. We have
12 deliberated on it. The only thing that I have heard
13 in terms of additional potential friendly amendment
14 is changing "points of contact" to "subject matter
15 experts."

16 Deb and Tom, are you okay with that
17 amendment to that point, changing "points of contact"
18 to "subject matter experts."

19 DR. GIBSON: Yes, that's fine with me.

20 DR. BARROS-BAILEY: Okay. We are at 20
21 minutes past the hour. I think at this point I'm
22 going to call the question. And I'm going to ask our

1 Designated Federal Officer -- we have a motion on the
2 floor. We have a second. We have had deliberation
3 about specific points within the motion.

4 And the motion is that the OIDAP recommend
5 to SSA the wording and the recommendations that are
6 on pages 11 through 13 of the final report to SSA --
7 the draft final report to SSA.

8 So that is the motion and the second. And
9 if -- Debra, if you would go through and take a
10 verbal call in terms of the vote of the Panel
11 members --

12 MS. TIDWELL-PETERS: I am here, Mary.

13 DR. BARROS-BAILEY: -- in terms of that
14 motion.

15 MS. TIDWELL-PETERS: Okay. I'm here.

16 The motion is on the floor and I am doing a
17 roll call vote of Panel members. Please respond yay
18 or nay.

19 Mary Barros Bailey.

20 DR. BARROS-BAILEY: As Chair I do not vote.

21 MS. TIDWELL-PETERS: John Creswell.

22 DR. CRESWELL: Yay.

1 MS. TIDWELL-PETERS: Bob Fraser.
2 DR. FRASER: Yay.
3 MS. TIDWELL-PETERS: Pam Frugoli.
4 MS. FRUGOLI: Yay.
5 MS. TIDWELL-PETERS: Shanan Gibson.
6 DR. GIBSON: Yay.
7 MS. TIDWELL-PETERS: Thomas Hardy.
8 MR. HARDY: Yay.
9 MS. TIDWELL-PETERS: Janine Holloman.
10 MS. HOLLOMAN: Yay.
11 MS. TIDWELL-PETERS: Allan Hunt.
12 DR. HUNT: Yay.
13 MS. TIDWELL-PETERS: Timothy Key.
14 MR. KEY: Yay.
15 MS. TIDWELL-PETERS: Deborah Lechner.
16 MS. LECHNER: Yay.
17 MS. TIDWELL-PETERS: Abigail Panter.
18 MR. KEY: I think her phone ran out.
19 MS. TIDWELL-PETERS: Yes, I think so.
20 Juan Sanchez.
21 I believe Juan dropped on the call a while
22 ago.

1 David Schretlen.

2 DR. SCHRETLEN: Yay.

3 MS. TIDWELL-PETERS: And Andrew Wakshul.

4 HONORABLE WAKSHUL: Yay.

5 DR. BARROS-BAILEY: Hearing the votes
6 from -- we have a quorum of members. I know a couple
7 of members their calls dropped. From the members in
8 the quorum of members that we have a unanimous vote
9 in terms of the motion on the floor.

10 Therefore, according to our operating
11 procedures we will take this to the Federal Register,
12 advertise it and we will anticipate a time that will
13 be advertised toward the end of June where we will
14 have the opportunity to hear public comment from the
15 stakeholders in terms of the recommendations and do a
16 final close out of the report.

17 Moving on, on the agenda we go to the
18 administrative business. So we only have one point
19 in terms of the administrative business and that's
20 the review of the March 2012 quarterly meeting
21 Minutes.

22 I only saw one edit coming from the Panel

1 in terms of the draft. Therefore, I will ask the
2 Panel if there are any changes to the draft of the
3 Minutes from the 2012 quarterly meeting?

4 Hearing no objections, the Minutes are
5 published as modified and received on Friday. Okay.

6 At this point I would like to acknowledge
7 those serving on the Panel with me who have offered
8 countless hours of their time and expertise, John
9 Creswell, Bob Fraser, Pam Frugoli, Shanan Gibson, Tom
10 Hardy, Janine Holloman, Allan Hunt, Tim Key, Deborah
11 Lechner, Abigail Panter, Juan Sanchez, David
12 Schretlen, and Andy Wakshul.

13 I also want to acknowledge past members who
14 have provided service to the American public through
15 their presence on this Panel since it's inception;
16 Jim Wood, retired from the US DOL and first Director
17 of the O*Net; Nancy Shor, the Executive Director of
18 NOSSCR; Mark Wilson, IO psychologist and Associate
19 Professor at North Carolina State University; Gunnar
20 Andersson, physician, orthopedist at Midwestern
21 Orthopedics at Rush; Lynnae Ruttledge who had left
22 the Panel to become Commissioner of the Rehab

1 Services Administration. Also, Sylvia Karman, the
2 former director of OVRD, and now the Director of
3 Disability Research Consortium at SSA.

4 I would also like to acknowledge staff at
5 SSA who have worked along side us in this process
6 starting with former director, Sylvia Karman, and
7 current acting director Susan Wilschke, director --
8 and today's acting DFO, Debra Tidwell-Peters;
9 Division Chief, Mark Trapani, and Byron Haskins, and
10 their talented staff that have been numerous and I
11 cannot name entirely without missing the name of
12 someone who has served on the staff over the last
13 three and a half years.

14 At the management level we would like to
15 thank Commissioner Mike Astrue who recognized the
16 critical need for updating the vocational part of the
17 disability program and formed this initiative in
18 2008. Deputy Commissioner, David Rust and his
19 assistant deputy -- Assistant Deputy Commissioner,
20 LaTina Green; the Acting Associate Commissioner,
21 David Weaver who spoke to us today, along with his
22 deputy and current Acting OVRD Director, Susan

1 Wilschke.

2 Also within SSA, there has been -- the
3 internal Panel of members from various components led
4 by Tom Johns who has been our internal counterpart.
5 Members of the workgroup have been very involved in
6 the OIS development from the beginning before the
7 OIDAP was developed. And most recently with many
8 hours of commitment to develop the DEC.

9 It has been an honor and a privilege to
10 work with each of you. The greatest thanks goes out
11 to the public for caring about the effects of the
12 project and making your voices heard. You will have
13 a chance to have them heard again from the results of
14 today's meeting.

15 In particular, I would like to thank some
16 of the stakeholder organizations that have been
17 consistent in your monitoring of this process in
18 providing public comments over many of our meetings
19 for the last three and a half years. The National
20 Association of Disability Examiners, or NADE; the
21 National Council of Disability Determination
22 Directors, or NCDDD; the International Association of

1 Rehabilitation Professionals or I-ARP; the American
2 Board of Vocational Experts, ABVE; the National
3 Association of Disability Representatives, or NADR;
4 the National Organization of Social Security Claimant
5 Reps, or NOSSCR; and the American Physical Therapy
6 Association, or APTA.

7 To the many individuals, particularly those
8 with disabilities who have provided public comment in
9 the past, thank you. You are the reason for this
10 project.

11 At this time we have concluded all business
12 called for on agenda. It is 12 -- we aren't done
13 yet. We will have one more meeting from the results
14 of this meeting.

15 I will ask our Designated Federal Officer
16 to work with the Panel in coming up with a date as
17 soon as possible the end of June that we will
18 announce in the Federal Register along with the
19 recommendation we have approved at this meeting. And
20 we will all talk together again at the end of the
21 month.

22 Thank you all, and I apologize for going a

1 half hour over time. I thank you for your time.

2 Hearing no additional business, I will turn
3 the meeting over to our Designated Federal Officer,
4 Deborah Tidwell-Peters for adjournment.

5 MS. TIDWELL-PETERS: Thank you, Mary.

6 And, again, thanks to all of you for your
7 service to the Agency.

8 If there are no objections the final public
9 meeting of the Occupational Information Development
10 Advisory Panel will adjourn.

11 Hearing no objections, we are adjourned.
12 Thank you.

13 (Whereupon, at 12:30 p.m., the proceedings
14 adjourned.)

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CERTIFICATE OF REPORTER

1
2
3 I, Stella R. Christian, A Certified
4 Shorthand Reporter, do hereby certify that I was
5 authorized to and did report in stenotype notes the
6 foregoing proceedings, and that thereafter my
7 stenotype notes were reduced to typewriting under my
8 supervision.

9 I further certify that the transcript of
10 proceedings contains a true and correct transcript
11 of my stenotype notes taken therein to the best of
12 my ability and knowledge.

13 SIGNED this 13th day of June, 2012.

14
15 _____
16 STELLA R. CHRISTIAN
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