

**Occupational Information Development Advisory Panel
Content Model and Classification Recommendations**

APPENDIX A

About the Panel

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About the Occupational Information Development Panel

Official Designation: The Committee is entitled the Occupational Information Development Advisory Panel, established by Michael J. Astrue, Commissioner of Social Security, on December 9, 2008.

Objective and Scope of Activities: This discretionary Panel, established under the Federal Advisory Committee Act of 1972, as amended (hereinafter referred to as “the FACA”), shall report to the Commissioner of Social Security (“Commissioner”). The Panel will provide independent advice and recommendations on plans and activities to replace the Dictionary of Occupational Titles used in the Social Security Administration’s (SSA) disability determination process. The Panel shall advise the Agency on creating an occupational information system tailored specifically for SSA’s disability programs and adjudicative needs. Advice and recommendations will relate to SSA’s disability programs in the following areas: medical and vocational analysis of disability claims; occupational analysis, including definitions, ratings and capture of physical and mental/cognitive demands of work and other occupational information critical to SSA disability programs; data collection; use of occupational information in SSA’s disability programs; and any other area(s) that would enable SSA to develop an occupational information system suited to its disability programs and improve the medical-vocational adjudication policies and processes.

Description of Duties: While the Panel’s role is solely advisory, the duties of the Panel include, but are not limited to: attendance at meetings; review of relevant materials; and participation in presentations, discussions, and deliberations to prepare and deliver recommendations to the Commissioner.

Panel Membership: The Panel shall be comprised of not more than 12 members, including: a) members of academia recognized as experts in relevant subject areas such as occupational analysis, vocational assessment, and physical and occupational rehabilitation; b) professional experts in relevant subject areas, such as vocational rehabilitation, forensic vocational assessment, and disability insurance programs; c) medical professionals with experience in relevant subject areas, such as occupational or physical rehabilitation medicine, psychiatry or psychology, and physical or occupational therapy; d) professional experts who represent or advocate on behalf of persons with disabilities; and, e) an SSA representative with expertise in SSA’s disability program policies, processes and systems.

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Member appointments may be made by the Commissioner for a period of two years. Members who are not full time Federal officers or employees shall serve as Special Government Employees under the authority of 5 U.S.C. § 3109. Members shall receive compensation for time spent on the Panel's behalf and reimbursement for travel expenses in accordance with the FACA and its implementing regulations.

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Members and Social Security Administration Staff

Panel Members

Gunnar B. J. Andersson, M.D., Ph.D.
Mary Barros-Bailey, Ph.D.— *Chair*
Robert T. Fraser, Ph.D.
Shanan Gwaltney Gibson, Ph.D.
Thomas A. Hardy, J.D.
Sylvia E. Karman, Project Director
Deborah E. Lechner, PT, MS
Lynnae M. Ruttledge, Director, WA VR Services
David J. Schretlen, Ph.D.
Nancy G. Shor, J.D.
Mark A. Wilson, Ph.D.

Mental Cognitive Subcommittee

David J. Schretlen, Ph.D.—*Chair*
Robert T. Fraser, Ph.D.
Sylvia E. Karman, Project Director

Physical Demands Subcommittee

Deborah E. Lechner, PT, MS—*Chair*
Gunnar Andersson, M.D., Ph.D.
Mary Barros-Bailey, Ph.D.
Sylvia E. Karman, Project Director

Work Experience Analysis Subcommittee

Thomas A. Hardy, J.D.—*Chair*
Mary Barros-Bailey, Ph.D.
Sylvia E. Karman, Project Director
Lynnae M. Ruttledge, Director, WA VR Services
Nancy G. Shor, J.D.

User Needs and Relations Subcommittee

Sylvia E. Karman, Project Director.—*Chair*
Mary Barros-Bailey, Ph.D.
Lynnae M. Ruttledge, Director, WA VR Services
Nancy G. Shor, J.D.

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Work Taxonomy and Classification Subcommittee

Mark A. Wilson, Ph.D.—*Chair*
Shanan Gwaltney Gibson, Ph.D.

Occupational Information Development (OID) Staff Office of Program Development and Research

Michael Dunn, Social Insurance Specialist
Debbie Harkin, Social Insurance Specialist
R.J. Harvey, Industrial/Organizational Psychologist
Sylvia Karman, Project Director
Sika Koudou, SCEP Student
Robert Pfaff, Senior Analyst
Shirleen Roth, Senior Analyst
Debra Tidwell-Peters, Designated Federal Officer
Mark Trapani, Senior Analyst
Elaina Wise, Staff Assistant

Occupational Information System Workgroup (members in addition to the OID staff)

Tom Johns, Branch Chief, Office of Quality Performance, Dallas
Kristen King, Administrative Appeals Judge, Appeals Council, Office of
Disability Adjudication and Review
John E. Owen III, Deputy Director, Division of Disability Determination
Services Operations Support, Office of Disability Determinations
Michele Schaefer, Program Policy Officer, Office of Disability Programs
Susan J. Swansiger, Acting Division Director, Division of Field
Procedures, Office of the Chief Administrative Law Judge, Office of
Disability Adjudication and Review
Nancy Torkas, Branch Chief, Program Analysis Office, Office of Medical
and Vocational Evaluation

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Member Biographical Information

Gunnar B. J. Andersson, M.D.

Dr. Andersson is the The Ronald L. DeWald, M.D. Professor and Chairman Emeritus of the Department of Orthopedic Surgery at Rush University Medical Center, Chicago, Illinois. Dr. Andersson was Chairman of the Department of Orthopedic Surgery from 1995 to 2008. During his tenure as Chairman he has also been the President of the Medical Staff, the Vice Dean for Surgical Sciences and Services and the Senior Vice President of Medical Affairs each for two year periods. Dr. Andersson received his M.D. from the University of Göteborg, Sweden in 1967, did his residency at Sahlgren University Hospital and also obtained a Ph.D. in medical science at the University of Göteborg in 1974. After a fellowship at the London Hospital he joined the faculty at the University of Göteborg for ten years.

In 1985 he moved to the United States and Rush University Medical Center. His clinical area of interest is spine while his research interests are disc degeneration, epidemiology and occupational biomechanics. Dr. Andersson is a past President of the Orthopaedic Research Society, the International Society for the Study of the Lumbar Spine and the American Academy of Disability Evaluating Physicians. He has been a council member of the National Institutes of Arthritis and Musculoskeletal and Skin Diseases at NIH, Chairman of the Research Committee at the American Academy of Orthopaedic Surgeons and a member of three Institute of Medicine committees. He is a member of 15 Editorial Boards, a Deputy Editor for Spine, Editor-in-Chief of Contemporary Spine Surgery and an Associate Editor of Clinical Biomechanics. He is the author of over 260 original publications, over 155 books and book chapters and 440 abstracts.

Mary Barros-Bailey, Ph.D.

Mary Barros-Bailey, PhD, CRC, NCC is a bilingual rehabilitation counselor, vocational expert, and life care planner in Boise, Idaho. She is a past Chair (2007-2008) of the Commission on Rehabilitation Counselor Certification (CRCC) and served as the Ethics Committee Chair from 2005-2007. Mary was one of the founding members of the Inter-organizational O*NET Task Force (IOTF) that in the early 2000s collaborated with the US Social Security Administration and the US Department of Labor on the use of occupational data within the disability context. She is a reviewer or on the Editorial Boards of several peer-review journals such as the Journal of Counseling & Development (American Counseling Association), the Journal of Forensic Vocational Analysis (American

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Board of Vocational Experts), and the Journal of Mixed Methods Research (SAGE Publications). Mary has a doctorate in Counseling with a cognate in Rehabilitation Counseling from the University of Idaho. Her research and presentation interests include professional issues in rehabilitation counseling (ethics, methodological, aging, multicultural, and international). She has presented and published nationally and internationally.

Robert T. Fraser, Ph.D.

Robert T. Fraser, Ph.D. is a professor in the University of Washington's Department of Rehabilitation Medicine, joint with the Departments of Neurological Surgery and Neurology and consultant with Associates in Rehabilitation and Neuropsychology. He is an active counseling and rehabilitation psychologist, a certified rehabilitation counselor and a certified life care planner who directs Neurological Vocational Services within Rehabilitation Medicine. Within neurological rehabilitation, he has specialized in epilepsy, brain injury, and multiple sclerosis.

Dr. Fraser is author or co-author of more than one hundred publications and co-editor on four texts to include Traumatic Brain Injury Rehabilitation (CRC Press, 1999), Multiple Sclerosis Workbook (New Harbinger, 2006), and Comprehensive Care in Epilepsy (John Libbey, 2001). He has been awarded numerous Federal grants by the Department of Education (NIDRR and RSA) - four of which have been specific to traumatic brain injury rehabilitation, and, more recently, in epilepsy self-management by the Center for Disease Control (CDC). He was awarded two World Rehabilitation Fund fellowships to review, respectively, the post-acute traumatic brain injury programs in Israel and epilepsy rehabilitation advances in Scandinavia and Holland. He lectures nationally on TBI rehabilitation. Research emphases have included evaluation of innovative psychosocial rehabilitation strategies and prediction of vocational rehabilitation outcome across different neurological disabilities. He is the recipient of two American Rehabilitation Counseling Association Research Awards, and an Epilepsy Foundation of America Career Achievement Award. Dr. Fraser is a past-president of Rehabilitation Psychology, Div. 22 of the American Psychological Association and a Fellow in the Division, a former Board member of the Epilepsy Foundation of America (EFA), a current board member of the Epilepsy Foundation Northwest, and was a former board member to the Board of Governors for the International Consortium of Multiple Sclerosis Centers.

Dr. Fraser has received master's degrees in rehabilitation counseling (University of Southern California) and public administration (Seattle University). His doctorate is in rehabilitation psychology from the University of Wisconsin–Madison, with a dissertation focused on the use of task analysis in the national classification and utilization of state agency vocational rehabilitation personnel.

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Shanan Gwaltney Gibson, Ph.D.

Professor Gibson's expertise is in issues related to human resources management & organizational behavior in organizations. Her research includes more than 35 published conference proceedings and 20 peer-reviewed journal articles on topics relevant to human resources and organizational development including job analysis, technology acceptance in organizations, and entrepreneurship. Her research can be seen in the Journal of Small Business Strategy, Business Education Forum, Small Business Institute Forum, and Management Research News, among others.

Professor Gibson is an Associate Professor of Management at East Carolina University and a member of the College of Business since 2003. Professor Gibson has extensive experience teaching issues related to occupational analysis; in addition to currently teaching graduate level Human Resources, she previously spent two years teaching Industrial and Organizational Psychology at ECU, as well as courses at Radford University and Texas A&M Corpus Christi. Professor Gibson was awarded the 2009 Robert L. Jones University Alumni Award for Outstanding Teaching and the 2009 Max Ray Joyner Award for Faculty Service through Continuing Education; she was recently named as the College of Business Teaching Fellow for 2009 – 2012. She is a member of The Academy of Management, the Society for the Advancement of Management, the Society for Industrial & Organizational Psychology, the Southeast Decision Sciences Institute, and the Southeast Institute for Operations Research and the Management Sciences.

Dr. Gibson graduated with a B.A. in Liberal Arts (magna cum laude) from Armstrong Atlantic State University and a M.S. in Industrial and Organizational Psychology and a Ph.D. in Industrial and Organizational Psychology from Virginia Polytechnic Institute & State University.

Thomas A. Hardy, J.D.

Thomas Hardy is an attorney in Private Practice concentrating his work in Social Security and Long Term Disability Appeals.

Previously, Hardy worked for a long term disability insurance carrier as the nationwide Manager of Vocational Rehabilitation Services; subsequently he took on Management of Medical Services and later also assumed the Supervision of Local Counsel. He was previously employed in the private sector as Vocational Disability Counselor. This combination of Medical, Vocational, and Legal knowledge made him a logical choice for a position on the IOTF (Inter Organizational Task Force) where he served for five years as a representative of

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the Private Insurance Industry to the Social Security Administration and Department of Labor.

Hardy earned his Juris Doctor from Rutgers University, his Masters Degree from the University of North Texas and Bachelors Degree from St. Charles Borromeo College. He is a member of the Pennsylvania and New Jersey Bars. Hardy also holds professional certifications from the national Board for Certified Counselors (NCC), Commission on Rehabilitation Counselor Certification (CRC) and Commission of Insurance Rehabilitation Specialists (CIRS). He resides in Philadelphia

Sylvia E. Karman

As Director for Social Security Administration's (SSA's) Occupational Information Development Project in the Office of Program Development and Research, Sylvia Karman, oversees the research and development of occupational information tailored to SSA's disability programs. She directs the investigations and developmental work to replace the Dictionary of Occupational Titles, as well as studies to inform disability policy development. She also chairs the Panel's User Needs and Relations Subcommittee and SSA's Occupational Information System Development Workgroup. Ms. Karman serves as an expert for SSA executive management and for numerous private and public sector entities on medical-vocational assessment and occupational information issues critical to SSA disability evaluation. As the former Chief of the Vocational Policy Branch in SSA's Office of Disability Programs and, before that, the lead senior policy analyst and project manager for occupational information analysis and policy issues related to SSA's use of the Dictionary, she has long held a leadership role for the agency in these subject areas.

Ms. Karman began her career with SSA in 1979 as a college intern. After graduating in 1982 with a BA degree from Towson University in Maryland, her work involved policy and legislative development and program evaluation for the Supplemental Security Income program under title XVI and for the agency's disability programs under both titles II and XVI. Ms. Karman has presented and published papers in the areas of SSA's use of the Dictionary of Occupational Titles for disability adjudication, medical-vocational assessment, and the role of vocational factors and occupational information in disability evaluation, including transferable skills analysis. She is a frequent speaker at conferences and seminars throughout the US and Canada.

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Deborah E. Lechner

Deborah graduated from the University of North Carolina at Chapel Hill in 1975 with a BS degree in physical therapy. She later received her post-professional masters from the Massachusetts General Institute in Boston. Lechner is President and founder of ErgoScience, Inc.

From 1988 to 1993, she developed and validated a state of the art FCE, the Physical Work Performance Evaluation (PWPE) as part of her research responsibilities at UAB. When the results of the research were positive, the University of Alabama at Birmingham Research Foundation encouraged her to market the evaluation. ErgoScience[®] was formed to meet this need. Lechner brings to the FCE process a solid grounding in biomechanics and kinesiology from her experience in a computerized gait analysis and teaching kinesiology. Another powerful influence on her approach to FCE was her graduate training at the Mass General Institute. The program emphasized standardization, objectivity, reliability, and validity in clinical measurement. In the PWPE, as with other ErgoScience[®] products and courses, she combines her research background with 25+ years of clinical experience. She has recently developed a job demands analysis process and has assisted her faculty in developing coursework in industrial rehabilitation, AMA impairment ratings, and marketing rehabilitation services. Under her leadership, ErgoScience[®] continues to combine both a clinical and research focus, as well as offering state-of-the-art continuing education.

Lynnae M. Rutledge

As a person born with a disability, Lynnae was served by the Michigan Vocational Rehabilitation program and assisted in obtaining her teaching credentials at the beginning of her career. Her extensive work history in the disability field has focused on working in the public and non-profit sectors in Michigan, Oregon and Washington. She has served in policy development, program management and key leadership positions in independent living, vocational rehabilitation, workforce development and business leadership networks.

Lynnae moved to the state of Washington in October 2005 to serve as the Director of the Washington Division of Vocational Rehabilitation. By 2007, the Division was recognized by the Governor with an outstanding management award and eliminated its 13,000+ waiting list by early 2008. Lynnae continues to lead the Division as it expands its capacity and partnerships to assure that more individuals with significant disabilities become successfully employed.

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As a Governor's appointee, Lynnae serves as an ex-officio member of both the State Rehabilitation Council and the State Independent Living Council. She represents the Department of Social and Health Services on the state Workforce Investment Board.

As a longtime volunteer and disability rights expert, Lynnae has been affiliated with Mobility International USA since 1988 and has traveled to China, Russia, New Zealand/Australia, Germany, Japan, Zimbabwe, Uzbekistan, Peru, Qatar, Tunisia and Mali.

David J. Schretlen, Ph.D.

David J. Schretlen is an Associate Professor of Psychiatry, as well as an Associate Professor of Radiology at the Johns Hopkins University School of Medicine. He is board-certified in clinical neuropsychology, and works at the Johns Hopkins Hospital, where he sees patients, teaches, and conducts research.

Dr. Schretlen completed his doctorate in clinical psychology at the University of Arizona in 1986, an internship at McLean Hospital, Harvard Medical School, and a post-doctoral residency in neuropsychology and rehabilitation at the UCLA Neuropsychiatric Institute. While at UCLA, Dr. Schretlen was awarded a Mary E. Switzer fellowship by the National Institute of Disability and Rehabilitation Research.

Dr. Schretlen has served as a grant reviewer for the National Institutes of Health and the Veterans Administration Medical Center. He serves on the editorial boards of several scientific journals. He also has authored over 175 articles, monographs, book chapters, and abstracts. His research interests include the use of quantitative brain imaging to investigate cognitive and emotional aspects of human behavior. He has received federal and private research funding to study determinants of work disability in traumatic brain injury and bipolar disorder. He currently is analyzing predictors of functional disability in schizophrenia and bipolar disorder. Related to this is another program of research in which Dr. Schretlen is developing strategies to increase the diagnostic sensitivity and specificity of neurocognitive measures for persons of diverse socioeconomic background.

In addition to research and teaching, Dr. Schretlen is actively engaged in clinical work that primarily involves neuropsychological assessment. He consults to physicians about treatment planning and attorneys about matters involving such matters as vocational aptitude and work disability resulting from brain injuries.

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Nancy G. Shor, J.D.

Nancy G. Shor is Executive Director of NOSSCR (National Organization of Social Security Claimants' Representatives) located in Englewood Cliffs, New Jersey. She edits NOSSCR's monthly publication, *Social Security Forum*, and coordinates NOSSCR's research and advocacy efforts on behalf of Social Security and SSI disability claimants. She is a frequent speaker at CLE programs across the country and has testified before Congressional committees on Social Security issues on numerous occasions. She is the author of two chapters of *Social Security Practice Guide*, published by Lexis Nexis. Ms. Shor is a member of the National Academy of Social Insurance.

Ms. Shor is a past Commissioner for the American Bar Association Commission on Law and Aging. In 2009, she was appointed to Social Security Administration's Occupational Information Development Advisory Panel. She graduated from Boston University School of Law in 1976 and Wellesley College in 1973. She is admitted to practice in Massachusetts and the District of Columbia. Ms. Shor was in private practice for two years before becoming the first Executive Director of NOSSCR in 1979.

Mark A. Wilson, Ph.D.

Dr. Mark A. Wilson, Associate Professor of Psychology and Area Coordinator of the Doctoral Program in Industrial and Organizational Psychology, NC State University, joined the faculty in 1992. He received a B.A. in Psychology from Wartburg College (1975), an M.A. in Experimental Psychology from the University of Missouri-Kansas City (1978), and a Ph.D. in Industrial/Organizational Psychology from Ohio State University (1983).

While completing the Ph.D., he served as Project Coordinator, Technical Director, and Senior Research Associate for Organizational Research and Development Inc. on a comprehensive human-resource research project involving human-resource planning, job analysis, selection (managerial assessment centers), performance appraisal, and compensation for a market-leading insurance company. The experience drastically altered his view of the field and his research interests. It was while working on the project that he developed his interest in the integration of human-resource systems, comprehensive job analysis, his dedication to the scientist-practitioner model and the problems of practitioners, and his love for fieldwork.

He has always been interested in work measurement issues, models of human job performance in organizations, and research methods. He has consulted and conducted research extensively with numerous large organizations in both the private and public sectors. He has taught graduate and undergraduate

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management courses as an Assistant Professor at both Texas Tech University (1981-1985) and Iowa State University of Science and Technology (1985-1992). In 1999, he was made an honorary member of the United States Army Special Forces. In 2006, he was appointed editor of *Ergometrika* (The Journal of Work Measurement Research). He is currently editing the forthcoming *Handbook of Work Analysis in Organizations* to be published by Psychology Press/Routledge.