

## **Occupational Information Development Advisory Panel Teleconference Meeting Minutes**

*November 17, 2010*

This document contains the minutes for the teleconference meeting of the Occupational Information Development Advisory Panel (Panel or OIDAP). This discretionary Panel, established under the Federal Advisory Committee Act of 1972, as amended (hereinafter referred to as FACA), will report to the Commissioner of the Social Security. The Panel will provide independent advice and recommendations on plans and activities to create an occupational information system (OIS) tailored specifically for the adjudicative process of SSA's disability programs. Specific areas include medical and vocational analysis of disability claims; occupational analysis, including definitions, ratings, capture of physical and mental/cognitive demands of work, and other occupational information critical to SSA's disability programs; data collection; use of occupational information in SSA's disability programs; and other related area(s).

### **Panel Members Present:**

Mary Barros-Bailey, Ph.D., Chair  
Shanan Gwaltney Gibson, Ph.D.  
Thomas A. Hardy, J.D.  
Janine S. Holloman  
H. Allan Hunt, Ph.D.  
Sylvia E. Karman  
Deborah E. Lechner  
Abigail T. Panter, Ph.D.  
David J. Schretlen, Ph.D.

### **Call to Order:**

Debra Tidwell-Peters, Designated Federal Officer, called the meeting to order, took a roll call to confirm a quorum of members, and turned the meeting over to the Panel Chair, Dr. Mary Barros-Bailey.

### **Welcome, Review of Agenda, and OIDAP Chair's Report**

#### **Mary Barros-Bailey, Ph.D., *OIDAP Chair***

Dr. Barros-Bailey gave a brief introduction and reminder to the Panel members and public audience of the Panel's role--that it is advisory, independent, transparent, and open. Dr. Barros-Bailey announced that Dr. Mark Wilson has resigned from OIDAP. Dr. Allan Hunt has accepted her request to take over the leadership of the Research Subcommittee as its new chair. Dr. Barros-Bailey reviewed the agenda and provided the Chair's report.

Dr. Barros-Bailey stated that the meeting, scheduled for October 29 with the Commissioner was postponed until December 7. She also stated that the Panel will be engaging in a strategic planning process with SSA during a fact-finding session in Baltimore in December and will probably engage in more formal strategic planning at the March quarterly meeting. Finally, she asked that all Panel members reply to Ms. Tidwell-Peters regarding the proposed 2011 Panel meeting dates.

### **Project Director's Report**

#### **Sylvia E. Karman, *OIDAP Member and Director, Occupational Information Development Project***

Ms. Karman provided an update and status on project activities since the September teleconference meeting. She stated that SSA established the Office of Vocational Resources Development (OVRD) to conduct research and development of SSA's OIS. This unit has two branches, one dedicated to research, design, and development and another to program integration.

Ms. Karman reported that SSA is in the process of completing its quality reviews of initial level cases for the Occupational Medical-Vocational Claims Review Study. When those reviews are complete, staff will conduct an analysis of the full initial level sample and report the results. SSA is finalizing the data collection instrument for review of the hearings level sample of cases. Ms. Karman anticipates pilot testing the instrument in December and beginning review of over 1100 hearings-level cases in January. Ms. Karman also reported that OVRD has completed an initial draft of the OIS Research and Development Plan and that it is currently undergoing internal review. OVRD is also developing a draft methodology for the development of the content model. Finally, Ms. Karman reported that SSA awarded a blanket purchase agreement to ICF, Inc., in September for services to provide research on methodologies for conducting job analysis and an overview of processes for training, recruiting, and certifying job analysts. ICF will deliver draft reports in March and June.

Dr. Hunt asked whether Ms. Karman has leadership in mind for the two branches of OVRD and whether she will staff them from existing staff on the project. Ms. Karman clarified that there are two individuals from current staff serving in those roles on an interim basis, but she has not posted for the jobs yet. Mr. Hardy asked whether any reports have been received from ICF, and Ms. Karman answered that the staff has met with ICF but has not received any preliminary work. Dr. Hunt asked what type of experience ICF has with job analysis, and Ms. Karman explained that they have a number of individuals on their team with a background in I/O Psychology and work analysis.

### **Research Subcommittee Chair Report**

#### **H. Allan Hunt, Ph.D., *Subcommittee Chair***

Dr. Hunt expressed his opinion that the Research Subcommittee can best contribute by providing advice on proposed research projects, particularly specific input early in the process. He plans to

work to establish better communication and coordination between the Panel and SSA staff on research issues.

### **User Needs and Relations Subcommittee (U&R) Report**

#### **Mary Barros-Bailey, Ph.D., *OIDAP Chair***

Dr. Barros-Bailey reported that the UN&R Subcommittee met three times since the last quarterly meeting. They completed the summary report of the public comment for the content model and classification recommendation report. She will deliver the report to the Commissioner on December 7.

Dr. Barros-Bailey also reported that the Subcommittee is considering how to handle public comments and is considering whether to post them to the website. The Subcommittee is also considering adding a frequently asked questions (FAQ) page to the OIDAP website.

Dr. Barros-Bailey reported that the Subcommittee will collaborate with OVRD to determine how to work together to engage the public and meet the need for transparency and accountability.

### **Panel Discussion and Deliberation on the OIDAP Proposed Recommendation to SSA on OIS Development Planning**

#### **Shanan Gwaltney Gibson, Ph.D., *UN&R Subcommittee Member***

Dr. Gibson read the proposed OIDAP recommendation--that SSA develop a project plan, timeline, and research plan, and allow the Panel and public to review the drafts. She reported that three public comments were received in response to the Federal Register request for comments. Individuals may view these comments at [www.regulations.gov](http://www.regulations.gov). Dr. Gibson reported that one comment was moderately unrelated to the recommendation, another was supportive, and the third gave advice regarding where to look as the project plan is being developed.

Dr. Hunt asked whether the Panel should respond to a comment from the California Employment Development Department which asked for a response from the Panel. Dr. Barros-Bailey suggested that the User Needs and Relations Subcommittee should consider the issue of how to handle the comment and consider including a FAQ on the OIDAP website to address the question. Mr. Hardy suggested that it could be problematic to respond to some input and not to others.

Ms. Tidwell-Peters polled the members on the draft proposed recommendation, and it passed unanimously. This is the eighth recommendation from the OIDAP to SSA.

### **Panel Discussion and Deliberation on Minutes**

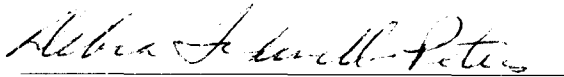
Dr. Barros-Bailey asked for discussion regarding the minutes from the September 2010 Quarterly Meeting. Mr. Hardy stated that he sent some minor changes. Ms. Tidwell-Peters polled the members on the minutes, and they were approved.

Dr. Barros-Bailey asked for discussion regarding the minutes from the teleconference held on September 29. Dr. Barros-Bailey asked for a modification to add Dr. Gunnar Andersson to the list of "Panel members present." Ms. Tidwell-Peters polled the members on the minutes and they were approved with modification.

The meeting adjourned at 10:44 a.m. (EDT).

**Certification:**

I, Debra Tidwell-Peters, Designated Federal Officer for the Occupational Development Advisory Panel, hereby certify that the above minutes accurately describe the discussion and deliberation during the teleconference meeting of the Panel held on November 17, 2010.



Debra Tidwell-Peters  
Designated Federal Officer

## **Occupational Information Development Advisory Panel**

### **Recommendation Number 8 to the Social Security Administration for OIS Development Planning**

In keeping with its charge to provide independent advice and guidance on plans and activities to develop a new Occupational Information System (OIS) that a) help the Social Security Administration (SSA) meet its burden of proof and be forensically defensible, b) reflect all work nationally, and c) link residual functional capacity to the requirements of work and that replaces the *Dictionary of Occupational Titles* (DOT) for disability adjudicative decisions, The OIDAP (Panel) strongly recommends that SSA:

1. take the immediate step to develop an overarching project plan and timeline that specifies SSA's needs and objectives with regard to occupational information;
2. develop a fully articulated research plan and associated processes that provide for the coordination of necessary scientific research and allow for the incorporation of findings and results as appropriate;
3. prepare and make available to the Panel the overall project plan, including the attendant research plans, for advice and recommendation before further developmental activities for the OIS proceed;
4. make public the aforementioned project and research plans, thus delineating how the agency plans to proceed in its efforts to develop said OIS.

The project plan should include scientific and programmatic justification for SSA's efforts going forth, as well as identification of the criteria that will ultimately be utilized to assess the performance of any new OIS system.

To fulfill the requirements of aforementioned project plan, SSA must also develop and make public a scientifically sound research plan that addresses the needs delineated by the project plan and that will guide the entire OIS development process. To meet SSA user needs, maintain stakeholder confidence, and ensure legal defensibility, it is critical that all intended research protocols be developed with oversight by internal scientists well-versed in research methods along with programmatic specialists and be reviewed by the panel prior to data collection.

Examples of issues that should be addressed by the recommended research plan include (but are not limited to): how to develop a content model that is legally defensible and possesses strong evidence of validity, determine the appropriate sampling methodologies for pilot testing of all instruments, develop a job analysis tool that will be utilized for collecting occupational information (including appropriate scales, methods of data collection, sources of data, etc.), and so on. The Panel

As approved by the Occupational Information Development Advisory Panel at its teleconference meeting November 17, 2010.

recognizes that any plan that is developed will be necessarily dynamic as new information and data may inform future steps; however, this does not negate the need for a published plan that is scrutinized for scientific rigor and adequacy.

In conclusion, the Panel wishes to emphasize that to achieve the goal of a legally defensible OIS, rigorous scientific methods must be utilized. The original Recommendations and associated subcommittee reports identified numerous empirical studies that should be conducted as part of the process of developing a new OIS; the Agency should examine these recommendations and identify those proposed studies that meet the requirements of good science and SSA disability program law and regulation for coordination into the project and research plans going forth. In addition, those existing SSA efforts that meet the requirements of good science and SSA disability program law and regulation should also be coordinated into the project and research plans going forth.