

**Occupational Information Development Advisory Panel  
Quarterly Meeting Minutes**

Social Security Administration  
Boston Park Plaza Hotel and Towers  
Boston, MA  
September 1-2, 2010

This document contains the minutes for the teleconference meeting of the Occupational Information Development Advisory Panel (Panel). 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).

*Wednesday, September 1, 2010*

**Panel Members Present:**

Mary Barros-Bailey, Ph.D. (*Chair*)  
Robert T. Fraser, Ph.D.  
Shanan Gwaltney Gibson, Ph.D.  
Thomas A. Hardy, J.D.  
Janine Holloman  
H. Allan Hunt, Ph.D.  
Sylvia E. Karman  
Deborah E. Lechner  
Abigail T. Panter, Ph.D.  
Mark A. Wilson, Ph.D.

**Call to Order:**

Debra Tidwell-Peters, the Designated Federal Officer, called the meeting to order and recognized the Panel's Chair, Dr. Mary Barros-Bailey.

**1. Description of Matter**

**a. Review of Agenda**

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

Dr. Barros-Bailey welcomed Janine Holloman as a new member of the Panel. Dr. Barros-Bailey acknowledged the absence of Drs. Anderson and Schretlen. Dr. Barros-Bailey thanked Randy

Brooks, Carmine Fuccillo, Carol Sax, Phillip Racicot, and Sal Natalie (employees of the Boston Regional Office) for their attendance at the Panel meeting.

Dr. Barros-Bailey provided an overview of the day's agenda, which included all topics solicited by Panel members with the exception of "skills." Dr. Barros-Bailey stated that the OIDAP would address "skills" at a future meeting once Mr. Hardy and Dr. Barros-Bailey further reviewed the topic. Dr. Barros-Bailey stated that the agenda included presentations provided by management and staff from the Social Security Administration addressing activities regarding the development of the new occupational information system (OIS). The presentations and agenda included:

- a brief address from the Associate Commissioner Richard Balkus, Office of Program Development and Research;
- reports from the OID Project Director and OIDAP Member, Sylvia Karman;
- a study on occupations held by SSI and SSDI claimants;
- a presentation about the occupational and medical-vocational claims review;
- a status update on the development of the user needs consideration for the content model;
- public comment;
- a session led by Dr. Gibson regarding the Public Feedback Summary Report;
- a review of the Research Subcommittee's Report led by Dr. Wilson; and,
- Panel deliberation.

Dr. Barros-Bailey concluded by asking that the Mental Cognitive Subcommittee and Work Taxonomy and Classification Subcommittee review the SSA's proposed rule for the revised medical criteria for the evaluation of mental disorders issued August 19, 2010 and report to the Panel during the December Quarterly Meeting.

#### **b. Opening Statement**

**Richard Balkus, Associate Commissioner, Office of Program Development and Research (OPDR), Social Security Administration**

Mr. Balkus expressed his gratitude towards the guests from the regional offices and welcomed David Blitz as the newest member to join OID Project team.

Mr. Balkus discussed the areas in which SSA agreed with the findings presented by the Panel regarding the National Academy of Science Report on O\*NET and findings presented by the National Academy of Science (NAS) Panel. Areas of agreement included:

- O\*NET, in its current form, was not suitable for disability adjudication;
- O\*NET would need to make significant changes for it to be suitable for disability adjudication;
- Such a redesign to meet SSA's requirements would entail substantial costs and could detract from O\*NET's workforce development purpose; and,
- The need to collaborate with the Department of Labor and other federal offices as SSA moved forward with the project.

Mr. Balkus stated that the agency would continue to discuss its plans and requirements with the Department of Labor and welcomed their input on the project. In addition, the agency would consider ways to cross-reference SSA's occupational data to O\*NET.

Mr. Balkus thanked the public and stakeholders for providing comments regarding the development of a new OIS. He found it imperative to reiterate the main purpose of the project, "to create an Occupational Information System tailored specifically for SSA's disability programs and adjudicative needs." Mr. Balkus outlined SSA's requirements, including the ability to support the law and regulations, how skills and transferability of skills were defined in the regulations, and the physical and mental demands of work that were defined in the regulations. However, Mr. Balkus stated that public comments that would require changes in the regulations were not within the scope of the project. Mr. Balkus stated that the end objective was to have a product that was an accurate description of the world of work and a product that contained valid and reliable data for adjudicating claims at Steps 4 and 5 of the sequential evaluation process.

Dr. Barros-Bailey questioned Mr. Balkus regarding SSA's attempt to acquire internal expertise. Mr. Balkus replied that the agency was currently in the process of locating such persons; David Blitz was the first addition and there were a number of procurement actions for consultants in the fields of vocational rehabilitation and industrial/organization. Mr. Balkus stated that SSA would continue to use expertise located within the agency.

## **2. Agency Reports**

### **a. Occupational Information Development Project Director's Report**

#### **Sylvia Karman, *Project Director and OIDAP Member***

Ms. Karman provided an overview of the project activities occurring since the Panel last met in June.

Ms. Karman stated that the Occupational Medical Vocational Study would evaluate 5000 adult disability claims, gathering information pertaining to the claimants' work histories in terms of past relevant work, the types of limitations reflected in the claimants' residual functional capacity assessments (both physical and mental), and the vocational outcomes, which included vocational rulings and jobs cited. Ms. Karman stated that the study would further examine the types of jobs cited at either the initial level with DDSs or appellate level if the vocational rulings and jobs cited were considered appropriate. Ms. Karman stated that to date, 3900 initial-level cases were completed and that project members were preparing to move into the review of the remaining cases at the appellate level. Ms. Karman stated that staff collaborated with persons within the agency to complete the development of a data collection instrument for cases at the appellate level because appellate level cases were different in terms of how they were set up. Ms. Karman anticipated that the study would be completed in the near future. Ms. Karman stated that senior management, including the Commissioner, were provided with initial results.

Ms. Karman stated that the investigation for the International OIS Review was complete. She stated that staff would complete a draft report over the next month-and-a-half and circulate a copy of the report for others to see. Ms. Karman stated that a draft would be ready by the end of September and she expected the final report to be completed by November.

Ms. Karman stated that the Content Model presentation would cover results compiled by staff members in regards to recommendations presented by the Agency workgroup, user needs identified through the U.N.A., the Panel's comments and recommendations, and comments presented by the public, in particular their responses to the Panel's recommendations. Ms. Karman reiterated that the presentation that day would elaborate on the user-identified needs that are the initial stage for the content model development. Ms. Karman stated that steps following the initial draft of the content model included developing the measures and scales necessary for the testing of particular data elements with users and eventually developing the work analysis instrument(s).

Ms. Karman welcomed David Blitz to the team once again and stated that his expertise was important pertaining to technical work. Ms. Karman stated that the project staff published a number of requests for quotes and proposals including:

- RFP – conducting user testing of person-side data elements, no award contracted;
- RFP – VR researcher consultant services; staff recently completed the Technical Evaluation Panel and made recommendations to the Office of Acquisitions and Grants, presently no award contracted;
- RFP – I/O or psychometrician, in the near future the Agency will convene the Technical Evaluation Panel for the consultant services of said person to develop the work analysis instrument; requested that an expert in work analysis from the Office of Personnel Management assist as a subject matter expert in the review of the proposals for the RFQ; and,
- RFQ – blanket purchase agreement, enables the Agency to issue a series of tasks against a larger contract; the tasks would include request for the contractor to develop a job analysis methodology and conduct benchmarking, in addition to developing a business process regarding recruiting, training and certifying the individuals for the purpose of doing job analyses. The Technical Evaluation Panel was in the midst of preparing its final evaluation and forwarding it to the Office of Acquisition and Grants.

Ms. Karman stated that staff members and Dr. Hunt conducted an extensive review of sampling methodologies for relevant federal surveys, in particular, the review evaluated the Bureau of Labor Statistics Occupational Employment Survey and the Census American Survey. Ms. Karman stated that meetings took place with the Census Bureau and the Bureau of Labor Statistics. Ms. Karman stated that in July, SSA staff briefed the Office of Management and Budget and the Department of Labor and Employment Training Administration on the status of the project.

Mr. Hardy requested that Ms. Karman provided the Panel with a written summary of the meetings that have occurred with other agencies as a means for documentation. Ms. Karman agreed. Mr. Hardy requested that the Panel receive a form of notification regarding the

processing of RFPs and RFQs (although he understood that to a certain extent the agency could not provide such details). Dr. Wilson made a similar request. Ms. Karman reiterated to the Panel that it was possible or permissible for the staff to share with the Panel pre-decisional information, although the public could not receive the information. Ms. Karman explained that pre-decisional information pertained to the statement of work, portions of the statement of work, and other material that would be of value for the Agency to have OIDAP members with particular expertise evaluate when an RFQ was solicited.

**b. Evaluation of 2008 Occupations Held by SSDI and SSI Disability Claimants**

**Renee Ferguson, *Statistician, Office of Program Research, OPDR***

Ms. Ferguson stated that the research goal was to classify occupational information based on a manual review of the administrative records for disability claims and unmask the occupations most frequently cited by the disability claimant population. Ms. Ferguson stated that the goal was to provide the full nine-digit DOT Code and the corresponding SOC codes for each of the job titles provided through the disability claims process in the hopes that the results would assist in directing future data collection efforts for occupations most frequently cited. Ms. Ferguson provided a very detailed discussion of the methodology.

Ms. Ferguson discussed in detail the process for application submission by claimants and the process for collecting data for the study. Ms. Ferguson discussed the limitations of the data, and elaborated on the process for obtaining a stratified random sample of cases. Per Dr. Panter's request, Ms. Ferguson reiterated the method for obtaining jobs titles. Dr. Wilson stated that the study illustrated the difficulty of performing work analysis at the level of the title and issues regarding within title variation.

**c. Occupational Medical-Vocational Claims Review Study**

**Mark Trapani, *Social Insurance Specialist, OPDR***

**Deborah Harkin, *Social Insurance Specialist, OPDR***

Mr. Trapani stated that the review of initial-cases was complete and the team was in the process of reviewing hearing-level cases and the team based the current results for the study on about two-thirds of the initial level sample. Mr. Trapani stated that purpose of the study was to identify primary occupational data related to the claimants, including functional occupational characteristics of applicants whose claims were approved or denied at Step 4 or 5 of SSA's sequential evaluation process and cases adjudicated at the initial and hearings level. Mr. Trapani believed that the data would help SSA establish a firm basis for its subsequent occupational information development activities. Mr. Trapani presented the primary study questions, which included:

- (1) What occupations were most commonly cited by disability claimants as work that they have performed in the past;

- (2) What occupations were commonly identified by the Disability Determination Services (DDS) and administrative law judges in Step 5 denials as work that the claimant could perform that existed in significant numbers in the national economy;
- (3) What were the most common functional limitations that claimants identify in the adjudication process; and,
- (4) And, what were the medical-vocational rules most commonly cited in the adjudication process?

Mr. Trapani stated that the study consisted of a randomly selected, nationally representative stratified sample of 5,000 claims that were decided in fiscal year 2009. Mr. Trapani stated that the sample was large enough to provide a high probability (95 percent) of identifying all occupations the claimants have performed that were substantially represented in the U.S. economy. Mr. Trapani provided a detailed description of the data collection process.

Ms. Harkin stressed the point that the reviewers involved in the data collection process were recording the case data as it appeared in the folder and it was not their job to re-adjudicate the claims and, for that reason, experienced disability adjudicators were needed. Ms. Harkin explained that for the purpose of the study, the recorded jobs had to meet SSA's definition of "past relevant work." Ms. Harkin explained that the claimant must have performed the job: (1) within the 15-year relevant work history; (2) at a sufficient level of compensation; and, (3) long enough to be learned.

Ms. Harkin discussed the protocol for excluding and including cases and the study's limitations, which included the application of the DOT titles and claimants' inadequate reporting of job titles. Ms. Harkin stated that inadequate reporting led to ambiguous job titles that were assigned a dummy code; however, the problem should be less prevalent at the ALJ level because the job titles were generally better documented. Ms. Harkin stated in more than two percent of the jobs assigned a code for a modern or an obscured job, the application of DOT codes to the claimants' past work were reflected in addition to the five percent for composite jobs. Ms. Harkin stated that some of the same limitations were present when the study captured jobs that SSA cited in Step 4 denials. Ms. Harkin reported that one of the problems recognized in the study was adjudicators were citing jobs that were no longer available in the national economy (as least according to the DOT description) in regards to Step 5 denials.

Ms. Harkin provided an overview of the study results and the remaining steps left to completing the study. Reviewers were still in the process of performing the quality review of the initial data and they would soon complete the targeted review of alternative DOT codes. Ms. Harkin stated that she was currently conducting a random review of the total data collected. Ms. Harkin concluded that once the quality review was completed, the team would be able to finalize the data from the initial level review. Ms. Harkin also stated that the team was in the final stages of developing the hearing-level data collection instrument. She stated that once the data collection instrument was complete the team would begin the pilot testing of the reviewers. She further explained that once the team completed the entire review it would consist of more than 1100 cases. Ms. Harkin stated that following the entire

review was a quality review of the hearing-level cases and the team would issue a draft and the final reports of the total analysis.

Dr. Wilson suggested that the team create a technical report of what was done as it approaches the final stages of the study in order to provide a record so that one could evaluate and to some extent understand the actions that took place and why particular decisions were made when conducting the study. Dr. Wilson also suggested that a comparison of the two studies, the Evaluation of 2008 Occupations held by SSDI and SSI Disability Claimants and the Occupational Medical-Vocational Claims Review, be conducted.

Per Dr. Wilson's request, Mr. Balkus described the peer review process that occurred within the Agency for publications. Dr. Hunt inquired if the Occupational Medical-Vocational study was also considering the usage of SOC. Ms. Harkin stated that consideration of SOC for usage would occur once the finalized data was available.

#### **d. Status of the Development of the OIS Content Model**

##### **Shirleen Roth, Office of Vocational Resources Development, Office of Program Development and Research**

Ms. Roth stated that the Agency was undergoing an effort to consolidate all comments received from the Panel, internal users, and the public and that the project team applied an analytical process in order to consolidate the comments into a list of person-side data elements and work-side dimensions for consideration by SSA as it moved forward into a testing procedure to identify data elements relevant for the content model. Ms. Roth stated the presentation would address the purpose of the research, research questions, and the activities underway that address the research questions and methodology used.

Ms. Roth stated that the purpose of the activity was to create a concise list of person-side data elements and work-side dimensions retrieved from over 1300 total comments obtained from the Panel Recommendation Report, User Needs Analysis, and extensive public comment. Ms. Roth further explained that the elements and dimensions derived from the list would be tested in both the world-of-work and by disability adjudicators in order to ensure that the new OIS focused on and meet the needs of the users. Ms. Roth stated that no empirical evidence had been in support of the particular data elements presented in the draft document but rather the activity drew directly from the Panel's report as the initial step for consideration of data elements.

Ms. Roth stated the for the purpose of the activity, the project team framed its work around the question, "what occupational information does SSA need or desire in order to effectively adjudicate claims for disability benefits?" In addition, the team focused on the sub-questions, "what person-side elements are essential or critical to assessing an individual's residual functional capacity, and what work-side dimensions are critical to assessing an individual's vocational profile?" Ms. Roth made a distinction regarding SSA's use of the term, person-side, in comparison to the DOT and O\*NET.

Ms. Roth stated that the present effort by the project team drew from the material made available by the Panel through activities occurring since 2009 in addition to the activities of an internal SSA workgroup, which consisted of stakeholder components within Social Security. Ms. Roth described the criteria used to determine the organization of comments for the draft paper. Ms. Roth stated that the synthesis document provided the basis for ensuring that the team considered every comment made in reference to the project and that it would serve as a historical record of the resolution and disposition of every comment.

Dr. Gibson stated the synthesis document was useful but she encountered problems while using it as the basis for the User Comment Summary Report. Dr. Gibson inquired about the methodological process for developing the document. Ms. Roth provided a description of the individuals involved in sorting and placing the recommendations and further explained that the development of the synthesis document was based upon multiple iterations because of the on-going nature of public comment. Dr. Gibson inquired about changes of the synthesis document; more specifically, those that led from a less developed form retrieved to a completed document retrieved later. Ms. Karman addressed Dr. Gibson question stating that the timing in which SSA received final public comment primarily influenced the differences between the two documents.

Ms. Roth explained that the analytical process performed by the staff did not involve assistance from researchers or industrial-organizational psychologists therefore the process was only an identification of user needs. Ms. Roth described in detailed the steps initiated throughout the process. Ms. Roth stated that the process began by compiling the sources of information and reviewing the documents to ensure that at least one source recommended all data elements required by SSA program and that those elements were included. The sources which addressed SSA programmatic needs were the Social Security Act and regulations, policy guidance (e.g. SSA rulings, internal operating manuals, & training materials), SSA current forms, and other miscellaneous materials (e.g. DOT & information about essential skills compiled in Canada guides).

Ms. Roth discussed the methodology for selection criteria, which addressed issues regarding different names for similar elements, the elements' levels of specificity, and identifying underlying concepts as a measure to resolve differences between elements. Dr. Wilson asked that Ms. Roth discussed the process used to identify underlying concepts. Ms. Roth provided examples of how the process occurred. Dr. Wilson asked for further procedural details. In particular, Dr. Wilson asked that Ms. Roth address several questions—including who was involved, how many people were involved, and the decisions pertaining to underlying concepts in regards to the total number of decisions that had to be made. Dr. Wilson stated that such information was valuable for developing a foundation for the project. Dr. Gibson stated that the present methodology as described appeared to have developed after the project was completed and that it was unclear how the plan was followed in regards to decision points and the criteria that guided the inclusion of content domain elements.

Ms. Roth reiterated that the process was not complete, that the current document was not the final document and that a plan existed and the team would document the plan based on the



Panel's request. Ms. Roth further discussed selection criteria as it pertained to data elements incorporated into the pre-decisional content model.

In terms of definitions, Ms. Roth asked that the Panel provide comments, and stated that there was a need for two types of definitions--conceptual and operational. Ms. Roth described the process for resolving differences in definitions and concluded by providing a summary of the material obtained in the pre-decisional draft document, the structure of the document, the number of team members involved in the project, and the steps that they will follow once the draft document is complete. The steps included speaking with I-O psychologists in order to identify the related work demands, work dimensions, and work activities related to each of the person-side data elements, developing instruments for the testing of those concepts, and then a process of revision and refinement.

Ms. Karman requested that the Panel provide comments on the information that was shared to date in order for the project team to begin stabilizing the initial list for the next stages of development. Dr. Wilson inquired about the evolving nature of the procedures and methodologies as described on slide four of Ms. Roth's presentation. Dr. Wilson specifically asked if there was a procedure and a series of methodologies determined in advance before the project team addressed its leading research question. Ms. Roth confirmed that the team followed a plan and method when addressing the leading research question.

Mr. Hardy stated that from a legal perspective it was imperative to have proper documentation and the documentation should be able to address such questions as who was making the decision, how and when decisions were made, and if changes occurred how were the decisions made. Mr. Hardy stated that such questions presented standard information an attorney would wish to know.

Ms. Karman addressed the need of the project team developing a business process plan that would define and outline in depth work performed by the Agency in the near future.

### **3. Updates**

#### **a. OIDAP Comment Process**

##### **Mary Barros-Bailey, Interim Chair**

Dr. Barros-Bailey stated that Dr. Gibson would provide a review of the results of the nine-month public comment and feedback period that followed the Panel's vote on the Recommendation Report. Dr. Barros-Bailey describe the feedback period, which occurred over a period of three quarterly meetings. She stated that announcements were made at each quarterly meeting over the nine-month period for public feedback, input was invited from specific user groups during the January 2010 meeting, and solicitation efforts for feedback included a fact sheet which condensed the Recommendation Report into four sheets.

Dr. Barros-Bailey discussed what was learned at the March Quarterly meeting regarding the NAS O\*NET review. After review by the Executive Subcommittee the full Panel, the DFO delivered the final report to the Commissioner on June 28, 2010.

Dr. Barros-Bailey discussed the measures used to incorporate public comment and a process to direct to SSA those deemed to be outside the scope of the Panel's mission as identified by the charter. Dr. Barros-Bailey requested that the User Needs and Relations Subcommittee review the model for future recommendation reports and provide the Panel with the recommendations to consider and possibly include in the Panel's operating procedures. Dr. Barros-Bailey stated that there might be other finding reports by the Panel in the future that might not need to go to public comment and that discussion on these reports and findings would continue to be part of the agenda as has been in the process. Dr. Barros-Bailey stated that anyone interested in delivering public comment on those finding reports that follow the Panel's agenda were welcome to do so.

#### **b. Update on User Needs Report on Comments on the OIDAP Recommendations**

##### **Dr. Shannon Gwaltney Gibson, Panel Member**

Dr. Gibson stated that the summary report only conveyed the concerns of users and did not address or rebut them based on Panel knowledge or feelings. Dr. Gibson stated that all comments were included whether delivered in person, fax, email or any additional formats. The official window for receiving comments occurred from November 2009 to June 2010, which was not the original timeframe planned.

Dr. Gibson stated 50 distinct individuals and 18 distinct organizations provided comments. Dr. Gibson stated that an inconsistency evident among the submitted comments was the permission to publish names, which is why the summary does not include the name of the commenter. Dr. Gibson discussed the comment categorization process. The categories for comment classification followed the structure of the Recommendation Report. Dr. Gibson stated that areas of particular concern included:

- The need for the Agency to collaborate with other governmental agencies in order to acquire resources and knowledge outside of SSA
- The perception that the Panel was not the most adequate source for the Agency to seek guidance from as it develops the OIS internally
- The genuine concern that SSA's desires to control the outcome of disability decisions.

Dr. Gibson stated that the committee focused on a few areas of emphasis as particularly imperative for SSA's consideration. Dr. Gibson stated that due to the major emphasis on science and expertise the committee decided to expand general recommendation number four. Recommendation four further suggested that SSA expand its efforts to establish internal expertise necessary to ensure that a strong research paradigm underlie the entire OIS development process. Dr. Gibson stated that the efforts should include a lead scientist and supporting staff who were well versed in psychometric theory and work analysis and the identification of internal staff with disability and program expertise that could work in

conjunction with the group. Dr. Gibson stated that until the Agency's internal research was established the committee recommends that the SSA's staff continue to work closely with the Panel seeking its advice and recommendations on issues directly related to scientific practice.

Dr. Gibson stated that the second area of emphasis focused on transparency, the need for the Agency to continue efforts to involve stakeholders of the scientific community in the process; in particular, it was recommended that SSA adopt a procedure that provided public comment on any internally developed prototype content models or tools. Dr. Gibson stated that associated with transparency, the subcommittee advised that SSA continue collaborative efforts with other governmental agencies.

Dr. Gibson suggested that the Panel adopt an official procedure for processing public comment and feedback.

Ms. Karman stated that there was a distinction between the recommendations and feedback submitted to the Panel and those received by SSA to specifically address agency policy. As a result, the process that the Panel adopts with regards for its public comment process does not have to mirror that used by SSA to process comments on proposed regulation or policy changes.

### **c. OIDAP Public Report Types**

#### **Dr. Barros-Bailey, Interim Chair**

Dr. Barros-Bailey discussed the difference between an OIDAP finding and a recommendations report. Dr. Barros-Bailey defined findings as the conclusions reached after examination of investigations of other documents. A findings report contains statements about authoritative decisions and conclusions. She stated that a finding does not necessarily result in a recommendation, but it may reinforce, clarify or expand existing recommendations. Dr. Barros-Bailey defined recommendations as advice or counsel on a course of action. Dr. Barros-Bailey stated that under FACA, GSA reported and tracked recommendations for response by SSA. Dr. Barros-Bailey stated that recommendations may cover technical, administrative, procedural or other issues related to the development of the OIS and was a result of examinations from findings. Dr. Barros-Bailey stated that the annual report was indeed a summary report and if the Panel had any recommendations prior to the release of the annual report, the recommendations would be published in a separate document.

Dr. Gibson asked that the Panel consider adopting a procedure for sending out all recommendations for public feedback and comment. After reviewing the voting procedures, Dr. Barros-Bailey entertained a motion for action on the actual process, Appendix C. Dr. Gibson moved that the Panel consider Appendix C as a process for soliciting and user comments in advance of any formal recommendations made to SSA. The Panel recommended that Appendix C remain as written except for the last paragraph and include a footnote. Mr. Hardy proposed an amendment to the motion. The motion passed unanimously.

#### **d. Research Subcommittee**

##### **Dr. Mark Wilson, Subcommittee Chair**

Dr. Wilson reviewed subcommittee activities, including their work to develop a document on writing a research proposal. Dr. Wilson stated that the document should be available to the committee for review soon and hopefully shortly afterwards would be available to SSA. Dr. Wilson stated that the main purpose of the document was to offer guidance towards writing research proposals in a scientifically acceptable manner.

Dr. Wilson stated the subcommittee met with, and received follow up from, the OID staff on the Occupational Medical-Vocational and other studies. Dr. Wilson stated that the goal of the subcommittee was to convene soon to develop a statement addressing the subcommittee's role and its efforts to present SSA with useful information that was consistent with scientific practices and principles.

Ms. Karman asked Dr. Hunt to provide a brief overview of encounters occurring since June with the Census Bureau and the review of methodology that was in place on sampling for O\*NET and the Panel's work on that. Dr. Hunt stated that the subcommittee visited the staff of the two major sources of occupational information, Occupational Employment Statistics Program at the Bureau of Labor Statistics (BLS) and the American Community Survey at the Bureau of the Census. Dr. Hunt stated that the Census Bureau had the household survey that replaced the decennial census, that the sample was large enough to generate occupational employment statistics, and that the BLS was accepting of the data utilization for a different purpose. The subcommittee will consider different options of how it can follow up with the Census Bureau since it would include acquiring special access to the data. Dr. Hunt stated that the data collected by the BLS was not as promising because the data collected info in SOC terms. He also indicated there is no other national, original data gathering efforts. Dr. Hunt stated that both databases could build upon a national sample or link to a national sample to extract and analyze a sample of jobs.

#### **4. Panel Discussion and Deliberations**

##### **Dr. Barros-Bailey, Interim Chair**

Dr. Gibson asked that Panel members read the revised Proposed Recommendation for OIS Development submitted to the Panel by the User Needs and Relations Subcommittee. Dr. Gibson stated that the revision in the document primarily reflected discussions held at the present meeting and the recommendation proposed for OIS development. The newly proposed recommendation reflected the need for SSA to: (1) produce an overarching plan that would describe in details their goals, order of completion and meaning of activities, and (2) produce a scientifically sound research model.

Ms. Lechner suggested that the User Needs Subcommittee revise the proposed recommendation. Dr. Gibson suggested that the revisions occur through a joint effort with the Research Subcommittee. Dr. Gibson requested that the Panel convene an ad hoc in order to address the revisions due to Dr. Barros-Bailey's warning regarding the risk of the subcommittees going into

quorum and deliberation if they chose to collaborate on the effort. Dr. Barros-Bailey stated that if the Panel agreed on the need for an ad hoc group, they would deliberate at the end of September, via teleconference. Drs. Gibson, Panter, and Wilson and Hunt agreed to take part in the ad hoc group.

Dr. Barros-Bailey asked that Mr. Hardy and Dr. Hunt, who had both conducted professional development sessions the previous day, provide the Panel with their thoughts in terms of future implications, directions, or activities that would assist the Panel in providing recommendations for SSA. Mr. Hardy and Dr. Hunt briefly reviewed important topics discussed during the two professional development meetings and reiterated how that information applied towards future implications. Several Panel members agreed with the need to collaborate with other federal agencies in particular the BLS, determine if useful data was available, and make those efforts known to the public.

**Meeting Adjournment:**

The meeting adjourned at 5:09 p.m.

*Thursday, September 2, 2010*

**Panel Members Present:**

Mary Barros-Bailey, Ph.D. (Chair)  
Robert T. Fraser, Ph.D.  
Thomas A. Hardy, J.D.  
Janine Holloman  
H. Allan Hunt, Ph.D.  
Sylvia E. Karman  
Deborah E. Lechner  
Abigail T. Panter, Ph.D. (via telephone)  
Mark A. Wilson, Ph.D.

**Call to Order**

Debra Tidwell-Peters, the Designated Federal Officer, called the meeting to order and recognized the Panel's Chair, Dr. Barros-Bailey.

**Overview of Today's Agenda**

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

Dr. Barros-Bailey greeted the attendees and explained how they could access the agenda and other information about Panel activities. She explained that she would soon appoint a chair for the User Needs and Relations Subcommittee and in the interim, asked Dr. Fraser to deliver the subcommittee report. She also thanked Amy Vercillo, a vocational expert the Boston area, for providing the Ad Hoc Group assistance with their job analysis exercise.

**Subcommittee Report—User Needs**

**Robert Fraser, Ph.D., *Member, User Needs & Relations Subcommittee***

Dr. Fraser reminded the Panel and attendees that the public comment period closed at the end of June and that Dr. Gibson gave a presentation on the previous day about the summary report of the public comment. The subcommittee continues to seek out organizations who may be interested in OIDAP activities. In the past year, they reached approximately 3,500 attendees at different national conferences. They are considering various ways of disseminating information about Panel activities. These options include a PowerPoint with a voiceover, live webinars, podcast deliveries, and e-mailing lists.

Dr. Barros-Bailey asked the User Needs and Relations Subcommittee to work with the SSA staff to develop a common list of words and definitions to eliminate some of the confusion caused, as some of the words used by the Panel have different meanings for different professions.

## **Status: Job Analysts Ad Hoc Group**

### **Deborah Lechner, *Ad Hoc Chair***

Ms. Lechner reported that the Ad Hoc Group has held five teleconferences since the last quarterly meeting. On August 30, 2010, they conducted a job analysis of the position of cashier at different locations in the Boston area. The purpose was to provide examples of job analysis approaches from three different disciplines: physical therapy, vocational counseling, and industrial/organizational psychology. They plan to compare and contrast the three approaches in a presentation to the Panel at the next quarterly meeting. They also plan to identify some of the differences in job analysis terminology used by various disciplines. The Ad Hoc will consider the information presented to them at this Panel meeting and consider whether they can address issues related to recruitment, training, and certification of job analysts.

### **Public Comment**

#### **Lynne Tracy, International Association of Rehabilitation Professionals (IARP)**

As a representative of IARP, Ms. Tracy provided public comment on the presentations provided on the previous day. She stated that IARP agrees that there needs to be a research plan with defined research questions. They recommend focusing on data from the Bureau of Labor Statistics' Occupational Employment Statistics. They are in favor of looking into utilizing the American Community Survey data as well, but are concerned that the data is self-reported.

Ms. Tracy commented that they believe there are limitations to the usefulness of the data presented by Renee Ferguson, because the study relied on self-report data. Respondents use terms job, occupation, and industry interchangeably. She also expressed concern about the variation in results between Ms. Ferguson's data, the results reported by Ms. Harkin and Mr. Trapani, and the IARP data.

#### **Angie Heitzman, International Association of Rehabilitation Professionals**

Ms. Heitzman stated that IARP agrees substantially with the findings of the Occupational Medical-Vocational Study. She also clarified that IARP provided preliminary past relevant work data to SSA in January of 2010, but had not analyzed the data at that time. She expressed concern that on the previous day, there was an indication that IARP endorsed certain items as an organization, which is incorrect.

Ms. Heitzman also expressed concern about the amount of effort that will be involved to gain access to employers, considering that it took Ms. Vercillo two and a half weeks to obtain approval for job analyses to take place in Boston.

Mr. Hardy asked whether IARP could identify barriers they encounter in specific industries and the amount of time it takes members to obtain approval for job analyses. Ms. Karman pointed out that SSA cannot ask a private sector organization to survey members of the public.

## **Administrative Meeting – Minutes**

The Panel approved the minutes from the previous quarterly meeting held in June.

## **Administrative Meeting – Agenda for December Quarterly Meeting**

Dr. Barros-Bailey invited discussion from the Panel regarding agenda items for the December Quarterly Meeting. The meeting will include Subcommittee presentations. Dr. Hunt requested a follow-up report on obtaining data from the Census Bureau and the Bureau of Labor Statistics. Dr. Barros-Bailey requested another presentation on the results of the Occupational Medical-Vocational study, a presentation on the International OIS Study, and a presentation on the data elements for the OIS.

Ms. Karman stated that SSA would like to obtain review of the data elements by the Mental-Cognitive Subcommittee and the Physical Subcommittee.

Mr. Hardy requested that the agenda for Panel meetings include more scheduled time for Panel deliberation.

Dr. Barros-Bailey requested a presentation by the National Institutes of Health regarding the interagency agreement between them and SSA. Ms. Karman stated that the request should go through the office within SSA that manages the agreement.


Ms. Lechner asked whether the subcommittees should provide summaries of their activities for inclusion in the annual report to the Commissioner. Dr. Barros-Bailey asked that they send the summaries to Ms. Tidwell-Peters.

Dr. Fraser asked whether Ms. Ferguson's group could report further on their statistical analysis of the claimant job data and reconcile differences with the IARP data. Ms. Karman said that she would speak with that group and determine whether there is a peer reviewed report that they could share with the Panel.

The meeting adjourned at 10:21 a.m. (EDT).

## **Certification:**

I, Deborah Tidwell-Peters, Designated Federal Officer for the Occupational Development Advisory Panel, hereby certify that the above minutes accurately describe the Quarterly Meeting of the Panel held on September 1-2, 2010, at the Boston Park Plaza Hotel & Towers, 50 Park Plaza at Arlington St, Boston, MA.

  
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Deborah Tidwell-Peters  
Designated Federal Officer