

Occupational Information Development Advisory Panel Quarterly Meeting Minutes

Sheraton St. Louis City Center
St. Louis, MO

March 24, 2010

This document contains the minutes for the quarterly meeting of the Occupational Information Development Advisory Panel (the "Panel"). This discretionary Panel, established under the Federal Advisory Committee Act of 1972, as amended (hereinafter referred to as "the FACA"), will report to the Commissioner of the Social Security ("Commissioner"). The Panel will provide independent advice and recommendations on plans and activities create an occupational information system tailored specifically for SSA's disability programs and adjudicative needs. The Panel will provide advice and recommendations related to the 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's 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.

Panel Members Present:

Mary Barros-Bailey, Ph.D. (*Panel Chair*)
Robert T. Fraser, Ph.D.
Shanan Gwaltney-Gibson, Ph.D.
Thomas A. Hardy, J.D.
H. Allan Hunt, Ph.D.
Sylvia E. Karman
Deborah E. Lechner
Abigail T. Panter, Ph.D.
David J. Schretlen, Ph.D.
Nancy G. Shor, J.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 Chair, Dr. Mary Barros-Bailey.

Review of Agenda

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

Dr. Barros-Bailey greeted the attendees and noted the absence of Panel member, Dr. Gunnar Anderson and reviewed the daily agenda.

Dr. Barros-Bailey encouraged the submission of comments and feedback from stakeholders and the public by the May 21, 2010 deadline. She informed the Panel of Commissioner Astrue's request that the Panel provide recommendations for SSA in the following areas: (1) the development of sampling and data collection plans for research and development; (2) the creation of a job analyst recruitment process; (3) the establishment of associations between human functions and requirements for work that best serve disability evaluations, and; (4) the review of relevant documents or reports that may affect or inform SSA's development of the Occupational Information System (OIS) .

Status on SSA Occupational Information Development Project (Project) Work Plan and Integration with Panel Activities

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

Ms. Karman provided an overview of SSA staff activities since the last Panel meeting, in particular the incorporation of the Panel's 2009 recommendations and SSA's plan for moving forward with the project.

Ms. Karman provided the status of the Occupational Medical Vocational Study. OID staff, along with other SSA colleagues who provided assistance, completed the pilot study and revised the data collection instrument and protocol. The full study will begin during the week of March 22, 2010.

Ms. Karman stated that the SSA staff had begun the initial work for the OIS Design Study I, clarifying that it was a precursor to the Pilot Study. Once finalized, Ms. Karman stated OPDR would share the draft with the entire Panel and the internal OIS Development Workgroup (Workgroup) for review and comment. SSA plans to conduct the study in FY2011.

Ms. Karman discussed the International Classification System Review currently underway. SSA anticipates the draft report will be available in August 2010.

Ms. Karman stated that SSA staff was working on a draft for the content model. She discussed the procedures for synthesizing the comments and feedback obtained from the user needs analyses and discussions with external and internal stakeholders. Ms. Karman discussed the deliberations that had occurred among Workgroup members and the process of future deliberations. Ms. Karman further elaborated on SSA staff responsibilities, collaborating with

the Workgroup, towards developing a draft of the person-side elements critical for disability evaluation. The tentative date for the delivery of the content model draft is May 2010.

Ms. Karman stated that the SSA staff, along with the User Needs and Relations Subcommittee, was investigating recommendations for communication and that areas of interest include defining web-based requirements for the project, exploring the use of the “Open Government” initiative. In addition, staff will consider exploring the use of the Federal Register notice and Regulation.gov to solicit and record feedback and comments, scheduling the recording of on-demand webinars, and the development of information fact sheets.

Ms. Karman described the next major steps for SSA, which included the development of functional requirements for the OIS and the development of a plan to recruit, train and certify job analysts.

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

Dr. Barros-Bailey reviewed the Panel’s roadmap discussing the changes and activities that had taken place since January.

Dr. Barros-Bailey discussed the different responsibilities of the Panel in regards to their directive to “review” SSA work products. This included: 1) looking over information provided by SSA staff; 2) advisory level assessment of information provided by SSA staff and offering feedback; and, 3) consulting with SSA staff. Dr. Barros-Bailey discussed the deliverables the Panel would provide to SSA and the different functions for items in the roadmap.

Ad Hoc Committee Report

Deborah Lechner discussed the role of the Ad Hoc Committee in developing recommendations for recruitment, training and certification of job analyst. Panel members raised questions and concerns regarding the Ad Hoc Committee. Dr. Hunt addressed concerns regarding the sequencing of events between developing an instrument and recruiting job analysts. Ms. Karman further elaborated on the establishment of an Ad Hoc Committee, stating it would address recruitment issues, training issues, and certification criteria for job analyst.

Subcommittee Reports

User Needs and Relations Subcommittee

Nancy Shor, J.D., *Subcommittee Chair*

Ms. Shor described the different forms of communication initiated by the Panel to reach the public. The forms included the posting of the Recommendations Report on the SSA Website; the creation of a fact sheet; video recordings of on-demand webinars by Panel members; the

potential use of “Open Government.” and presentations by OIDAP members and staff at stakeholder community conferences.

Ms. Shor requested that the Chairs of the remaining subcommittees create fact sheets (that she described as potentially much more approachable than the Recommendations Report), and which would provide guidance for individuals who felt intimidated by the report. Ms. Shor stated that the “Open Government” initiative was a new way for federal agencies and the public to communicate with each other. Ms. Shor stated that the first webinar would provide an overview of the Panel’s recommendations and the second webinar would appear as a fact sheet with specific information from the recommendations. Ms. Shor stated that once recorded, SSA would make the webinars available from the website on-demand.

Ms. Shor stated that a goal for the subcommittee was to come up with ways in which the public could avoid visiting numerous websites when looking for available documents, the most practical being a connection between several sites through their links.

Dr. Gibson readdressed the reasoning behind creating a fact sheet. She described her experience when presenting to rehabilitation professionals in Minneapolis stating that it went very well; however, she realized it was important to provide an introduction of the project and explanation of why it was relevant. Dr. Gibson also suggested that Panel members make time to speak personally with members of the public. She felt this would present a comfortable environment for those who prefer speaking in private versus amongst the crowd. Ms. Shor announced that there were forms for the presenters to complete detailing the presentation and any questions, or issues, raised. The committee was interested in retrieving feedback regarding their experiences, the ultimate goal being the collection of information that would inform presentations for the future.

Ms. Karman suggested that Panel members and SSA employees (including Occupational Information Development Team and OIS Development Workgroup members) attend presentations together. She found that audience members raised questions directed toward Social Security during the presentations. Ms. Karman stated that there were generic PowerPoint presentations and a list of the top ten questions and answers prepared for presenters.

Ms. Shor requested that Panel members and members of the audience provide suggestions of any organization that might be interested in the Panel’s work. Ms. Shor informed first-time listeners that they would receive a follow-up call in the following weeks. Ms. Shor stated that the main objectives of the calls were to inquire about the listeners’ interests and to encourage the submission of comments.

Ms. Shor stated that we made progress in terms of processing incoming communication. However, Ms. Shor stressed that SSA make comments or feedback available for the public, the Panel, and persons submitting the comments.

Ms. Shor informed the Panel that staff delivered a letter to the Commissioner requesting the extension of the comment period and the use of the Federal Register as a location to receive and post comments. Ms. Shor concluded by discussing the possible difficulty people were having

when providing comments. Commenters stated that the present information was very theoretical. Ms. Shor believed that once the project provided more tangible explanations, people would feel more comfortable commenting. Ms. Shor reiterated that the official comment period will end on May 21 but told the audience that regardless of the date, the Panel always welcomed comments.

Ms. Karman requested that Panel members inform Ms. Shor and Ms. Tidwell-Peters when they received opportunities to speak.

Dr. Barros-Bailey informed the public of changes that occurred among the subcommittees.

Research Subcommittee

Mark Wilson, Ph.D., *Subcommittee Chair*

Dr. Wilson reviewed three of the most prominent activities that the subcommittee had undertaken, which were comments and advice regarding National Academy of Science Report, the OIS Design Study I, and professional development activities. Dr. Wilson clarified that the main role of the subcommittee was to respond to questions and inquire in the areas of their expertise.

Panel Discussion and Deliberations

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

The Panel discussed the nomenclature for the OIS. Several members recommended the Disability Occupational Information System to distinguish its development as specifically meant for the needs of SSA.

Dr. Barros-Bailey discussed the purpose of the roundtables and their relevance towards developing a new OIS. The Chairs of the subcommittees discussed their thoughts regarding roundtables as they pertained to their committees.

Ms. Karman suggested that subcommittee members begin the search for expert presenters by thinking of the type of questions they wish to address. Ms. Shor asked if there was a particular roundtable protocol for gathering presenters. Ms. Karman responded that there was no official protocol but thus far, the subcommittees were taking the lead in suggesting experts for the discussions.

Dr. Schretlen suggested that the configuration of the roundtables remain small, the larger the group the more difficult it would be to coordinate the event. Ms. Karman reminded the Panel that SSA staff provides support for the roundtables.

Dr. Barros-Bailey discussed the process for a final written document that would include summaries from the roundtables and a review of the NAS Report as requested by the

Commissioner. Ms. Karman clarified for the Panel that the only document with a set deadline was the summary of Panel's FY 2010 activities, scheduled for delivery on November 30, 2010.

Public Comment

John Reeves, Reeves Associates, Midwest Independent Sales and Training Representative for Vertek & Vocational Rehabilitation Institute

Mr. Reeves discussed some of the challenges that the new OIS would encounter. The challenges included: (a) the collection of data for occupations that included certifications or licensures; (b) the difficulty that end-users might have when searching for the occupations through the database; and, (c) the collection of accurate job descriptions due to the combination work fields attached to a particular DOT. Mr. Reeves stated that combination work fields often consisted of huge lists of duties that were associated with a particular job, although the individual might have never performed the task. Mr. Reeves stated that the best way to address this issue was through direct contact with the employee.

Mr. Reeves suggested that aptitude remain a part of the new OIS and that the Mental-Cognitive subcommittee consider workplace mentor as a data element source.

Meeting Adjournment

The OIDAP Chair adjourned the Quarterly Meeting for the day at 3:09 p.m. (CDT).

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

Sheraton St. Louis City Center
St. Louis, MO

March 25, 2010

Panel Members Present

Mary Barros-Bailey, Ph.D. (*OIDAP Chair*)
Robert T. Fraser, Ph.D.
Shanan Gwaltney-Gibson, Ph.D.
Thomas A. Hardy, J.D.
H. Allan Hunt, Ph.D.
Sylvia E. Karman
Deborah E. Lechner
Abigail T. Panter, Ph.D.
David J. Schretlen, Ph.D.
Nancy G. Shor, J.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.

Description of Matters and Review of the Agenda

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

Dr. Barros-Bailey welcomed the attendees and informed new listeners that there were several documents listed on the website that provide insightful information. She restated the role of OIDAP in the SSA's development of the new OIS.

Dr. Barros-Bailey encouraged members of the public and stakeholder organizations to submit comments on the OIDAP's September 2009 report through May 21, 2010. She reiterated that public comments were always welcomed and described the several venues used to make the report available to the public and explained that new efforts to solicit comments would be investigated.

Dr Barros-Bailey discussed Commissioner Astrue's request for the Panel to provide SSA with recommendations and stated that today's meeting would focus on the his request to review

documents or reports identified by SSA as potentially affecting, or informing, SSA's work on the OIS.

Presentation – Overview of the National Academies' Review of O*NET

**Ms. Margaret Hilton, *Study Director and Senior Program Officer*
Center for Education, The National Academies of Science**

**Mr. Thomas Plewes, *Associate Study Director and Senior Program Officer*
Committee on National Statistics, The National Academies**

Ms. Hilton stated that the study was entitled, "A Database for Our Changing Economy: Review of the O*NET." Ms. Hilton discussed the reasons behind conducting the study. Ms. Hilton stated that the Department of Labor was interested in the use of O*NET and an evaluation of its usage. Ms. Hilton stated that the Department of Labor was particularly interested in the use of O*NET for workforce development, human resources management (especially in business and job matching) and the linkage of O*NET with other classifications, in particular the Federal Government's Standard Occupational Classification system. Ms. Hilton stated that the Department of labor also requested recommendations for the improvement of O*NET.

Ms. Hilton discussed the selection process for the National Academy of Science Panel (NAS Panel). Ms. Hilton stated that areas of expertise were balanced; and that the NAS Panel was composed of I/O psychologists and users of O*NET (including those involved in its original development--some of the biggest proponents of O*NET--and those who had questions about the system).

Ms. Hilton described the process created for the study that consisted primarily of literature reviews, public workshops, and closed sessions. Ms. Hilton stated that the NAS was able to deliberate in closed sessions due to a special exemption granted to the NAS by the Federal Advisory Committee Act. Ms. Hilton informed everyone that a copy of the pre-publication report was available on the NAS website. Ms. Hilton also informed everyone that the pre-publication report was going through its final round of editing and, once that stage was complete, NAS staff would update the website with the final version.

Ms. Hilton described past studies conducted by NAS on: the Dictionary of Occupational Titles; a 2002 preliminary review of a research plan to redesign disability determination entitled "Dynamics of Disability"; and a study that looked at a number of different occupational information classification systems entitled, *The Changing Nature of Work: Implications for Occupational Analysis*.

Mr. Plewes provided a description of O*NET. He discussed its usage and its users. Mr. Plewes discussed the NAS Panel's decision to include a chapter that addressed SSA's possible usage of O*NET and the procedure conducted when determining if the O*NET would be of any use. Mr. Plewes discussed improvements for O*NET that would address SSA's needs which included: (1)

the assessment of occupational needs; and, (2) analyzing interagency cost-benefit and cost sharing.

Ms. Hilton addressed several specific issues related to O*NET including the level of aggregation, methods of data collection, and short-term policy agendas. An exchange of questions and answers took place between the Panel, Ms. Hilton and Mr. Plewes.

Panel Discussion and Deliberation

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

Dr. Barros-Bailey summarized major points from the presentation and the discussion with the NAS representatives. Dr. Barros-Bailey suggested the Panel might want to schedule a teleconference to discuss issues clarified during the NAS presentation. It would also provide an opportunity to deliberate on how that information might affect the Panel's advice and recommendations to SSA.

Ms. Karman suggested the Panel adjust the timing for the NAS roundtable due to the publication date for the final official NAS report. Dr. Gibson suggested the Panel discuss what they expect to achieve through the roundtable. Dr. Wilson suggested the Panel discuss the protocol for the roundtable, including potential guests. Dr. Barros-Bailey suggested the four-square document may become more specific and addresses the following key points: (1) purpose; (2) cost-benefit; (3) time-analysis; and, (4) timing. Ms. Karman and Dr. Wilson suggested the Panel investigate alternate approaches beyond the roundtables that could provide answers to the Panel's questions. Dr. Barros-Bailey suggested that staff integrate a comparison of current anchors with the OIS Design Study.

Administrative Business

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

Dr. Barros-Bailey entertained a motion to approve the minutes.

Dr. Barros-Bailey discussed the agenda for the June Quarterly Panel Meeting. She stated that the public feedback period would extend throughout the months of March and June. SSA staff would retrieve and review comments submitted electronically. Dr. Barros-Bailey stated that several of the members would travel to conferences and these events provide many opportunities to retrieve public feedback from several organizations. Dr. Barros-Bailey anticipated there would be a couple of technical reports offered between March and June and that there would be presentations based on them. In addition, Dr. Barros-Bailey suggested that the Panel might want to conduct research to determine points for discussion regarding the NAS study. Dr. Hunt suggested that the Panel also discuss the labor market roundtable.

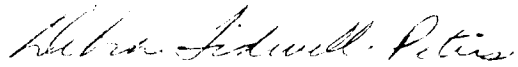
Ms. Karman stated that she was uncertain if the draft for the Content Model would be completed and available for the Panel by June. Dr. Barros-Bailey concluded by asking if there were additional areas in which the Panel needed training or professional development. The Panel raised no additional areas.

Meeting Adjournment

The OIDAP Chair adjourned the Quarterly Meeting at 11:34 a.m. (CDT).

Certification:

I, Debra 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 March 23- 25, 2010, at the Sheraton St. Louis City Center, 400 South 14th Street, St. Louis, MO.



Debra Tidwell-Peters
Designated Federal Officer