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OCCUPATIONAL INFORMATION DEVELOPMENT

ADVISORY PANEL

FINAL TELECONFERENCE MEETING

JUNE 4, 2012

SOCIAL SECURITY ADMINISTRATION

WASHINGTON, D.C.

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DR. MARY BARROS-BAILEY

CHAIR

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

- MARY BARROS-BAILEY, Ph.D., Chair
- JOHN W. CRESWELL, Ph.D.
- ROBERT T. FRASER, M.D.
- PAMELA L. FRUGOLI
- SHANAN GWALTNEY GIBSON, Ph.D.
- THOMAS A. HARDY, J.D.
- JANINE S. HOLLOMAN
- H. ALLAN HUNT, Ph.D.
- TIMOTHY KEY
- DEBORAH E. LECHNER
- ABIGAIL T. PANTER, Ph.D.
- JUAN I. SANCHEZ, Ph.D.
- DAVID J. SCHRETLEN, Ph.D.
- HONORABLE ANDREW E. WAKSHUL

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## P R O C E E D I N G S

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

9 Please go ahead, ma'am.

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

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

19 Mary Barros-Bailey.

20 SPEAKER: Here.

21 MS. TIDWELL-PETERS: John Creswell.

22 SPEAKER: Here.

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

1 MS. TIDWELL-PETERS: And Andrew Wakshul.

2 SPEAKER: Here.

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

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

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

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

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

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

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

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

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

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

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



1 Research.

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

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

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

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

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

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

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

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

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

22           And the inability to have updated data

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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



1 therefore, evident to the Panel and the public.

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

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

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

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

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

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

22 In terms of staffing, Sylvia Karman who was

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

15 DR. BARROS-BAILEY: Sure.

16 MR. HARDY: Okay. Thank you.

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

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

1 DOL to gather the data?

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

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

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

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

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

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

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

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

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

5 MR. HARDY: Okay. Thank you.

6 DR. BARROS-BAILEY: Other questions?

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

9 DR. BARROS-BAILEY: Okay.

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

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



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

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

6 DR. BARROS-BAILEY: Other questions?

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

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

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

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

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

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

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

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

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

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

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

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

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

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

3 DR. BARROS-BAILEY: Sure.

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

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

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

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

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

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

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

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

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

17 MS. FRUGOLI: This is Pam Frugoli.

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

20 MR. WEAVER: You can clarify something.

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

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

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

20 And there --

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



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

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

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

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

21           DR. BARROS-BAILEY: Go ahead.

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

1 good descriptive clarification, Pam. Thank you.

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

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

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

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

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

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

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

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

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

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

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

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

11           Partly because those --

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

14           MR. HARDY: I am sorry.

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

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

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

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

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

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

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

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

13           DR. BARROS-BAILEY: Okay.

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

16           MR. WEAVER: Okay.

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

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

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

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

15 DR. BARROS-BAILEY: Other questions?

16 I have a couple more.

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

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

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

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

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

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



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

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

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

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

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

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

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

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

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

16 DR. BARROS-BAILEY: Okay.

17 Other questions from the Panel?

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

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

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

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

1 request and will be offering reports.

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

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

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

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

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

13 MS. LECHNER: Thanks, Mary.

14 Can you all hear me? Great. Thanks.

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

1 this Panel.

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

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

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

1 overarching comments.

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

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

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

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

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

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

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

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

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

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

11          Do I have a second?

12          DR. FRASER: Second.

13          DR. BARROS-BAILEY: And who seconded?

14          DR. FRASER: Bob Fraser.

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

16          Discussion. Any discussion?

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

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



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

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

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

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

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

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

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

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

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

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

6 DR. BARROS-BAILEY: Thank you.

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

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

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

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

22 And if I have -- some other committee

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

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

13 MS. LECHNER: Yes. Correct.

14 DR. SCHRETLEN: Okay.

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

17 Okay. Thank you, Deb.

18 MS. LECHNER: Yes.

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

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

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

3 DR. SCHRETLEN: Yes.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

13 Okay. Thank you.

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

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

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

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

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

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

22 As a result of this meeting it was decided



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

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

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

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

1 disability adjudication.

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

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

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

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

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

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

22           The Taxonomy and Instrumentation

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

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

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

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

22 The multiple methods of data collection,

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

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

9           And that's everything on this end.

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

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

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

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

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

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

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

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

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

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

17 MS. HOLLOMAN: Thank you, Mary.

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

1 Professionals earlier this month.

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

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

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

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

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

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

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

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

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



1 and/or the processing of the findings.

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

6           Thank you.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

1 sources.

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

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

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

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

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

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

5 DR. GIBSON: Mary, this is Shanan.

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

11 DR. BARROS-BAILEY: Okay.

12 DR. GIBSON: That might help.

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

22 Number two, the Panel recommends that

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

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

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

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



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

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

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

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

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

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

10 MS. LECHNER: I do.

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

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

22 DR. BARROS-BAILEY: Yes.

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

4           DR. BARROS-BAILEY: Correct.

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

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

22           MR. HARDY: On the recommendations.

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

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

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

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

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

1 psychometrically sound.

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

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

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

1 to the validity of the data.

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

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

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

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

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

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

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

9 HONORABLE WAKSHUL: This is Andy.

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

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

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

20 DR. BARROS-BAILEY: Nine through 14.

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

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

5 DR. SCHRETLEN: Okay.

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

8 MR. HARDY: This is Tom Hardy.

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

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

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

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



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

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

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

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

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

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

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

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

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

19           DR. BARROS-BAILEY: Yes.

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

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

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

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

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

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

16 DR. BARROS-BAILEY: Yes.

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

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

21 MR. HARDY: I second the amendment.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

3 DR. BARROS-BAILEY: Or deemphasizing it.

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

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

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

14 MS. LECHNER: What section are we removing?

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

18 DR. CRESWELL: This is John again.

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

20 DR. CRESWELL: Okay.

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

22 DR. BARROS-BAILEY: Okay. Tom.

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

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

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

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

21 DR. PANTER: This is Abigail.

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

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

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

9 DR. FRASER: This is Bob.

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

13 DR. BARROS-BAILEY: Okay.

14 HONORABLE WAKSHUL: This is Andy.

15 I would like to keep it in.

16 DR. BARROS-BAILEY: Okay.

17 MS. HOLLOMAN: This is Janine.

18 I would like to keep it in.

19 MR. KEY: This is Tim.

20 And I say keep it in as well.

21 DR. BARROS-BAILEY: Okay.

22 MS. FRUGOLI: This is Pam Frugoli.



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

7           DR. BARROS-BAILEY: Okay. Allan.

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

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

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

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

1 relative? That's just a typo.

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

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

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

19 DR. BARROS-BAILEY: Okay.

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

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

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

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

9 DR. BARROS-BAILEY: I missed that.

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

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

13 DR. GIBSON: This is Shanan.

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

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

20 DR. GIBSON: Represents.

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

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

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

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

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

14 DR. GIBSON: It should, yes.

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

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

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

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

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

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

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

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

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

3 Is everybody okay with that wording?

4 DR. SCHRETLEN: Yes.

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

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

18 MS. LECHNER: Agreed.

19 MR. HARDY: I agree.

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

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

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

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

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

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

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

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

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

22 DR. SCHRETLEN: I think what I was



1 responding to is both you and Shanan --

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

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

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

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

1 experts.

2 DR. BARROS-BAILEY: Okay.

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

10 DR. FRASER: This is Bob.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

19 Mary Barros Bailey.

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

21 MS. TIDWELL-PETERS: John Creswell.

22 DR. CRESWELL: Yay.

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

1 David Schretlen.

2 DR. SCHRETLEN: Yay.

3 MS. TIDWELL-PETERS: And Andrew Wakshul.

4 HONORABLE WAKSHUL: Yay.

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

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

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

22 I only saw one edit coming from the Panel

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

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

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

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

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

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

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



1 Wilschke.

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

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

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

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

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

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

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

22           Thank you all, and I apologize for going a

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

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

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

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

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

11 Hearing no objections, we are adjourned.

12 Thank you.

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

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CERTIFICATE OF REPORTER

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

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

13 SIGNED this 13th day of June, 2012.

14  
15 \_\_\_\_\_  
16 STELLA R. CHRISTIAN  
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