

Occupational Information Development Advisory Panel
Social Security Administration
Quarterly Meeting
March 22, 2012

Minutes

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

Panel Members Present:

Mary Barros-Bailey, Ph.D., Chair
John W. Creswell, Ph.D.
Robert T. Fraser, Ph.D.
Pamela L. Frugoli
Shanan Gwaltney Gibson, Ph.D.
Thomas A. Hardy, J.D.
Janine S. Holloman, MA, CRC, LPC, CBIS
H. Allan Hunt, Ph.D.
Abigail T. Panter, Ph.D.
Juan I. Sanchez, Ph.D.
David J. Schretlen, Ph.D.
Andrew E. Wakshul, J.D.

Absent:

Timothy Key, MD
Deborah E. Lechner, PT, MS

Thursday, March 22, 2012

8:30 a.m. EDT

Call to Order

Leola S. Brooks, *Designated Federal Officer*

Overview of Agenda/Chair's Report

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

Office Director's Report

Sylvia E. Karman, *Director, Office of Vocational Resources Development (OVRD)*

Welcome Remarks

David A. Rust, *Deputy Commissioner*
Office of Retirement and Disability Policy

Subcommittee Reports

- User Needs and Relations Subcommittee,
Janine Holloman, *Chair*
- Taxonomy/Instrumentation Subcommittee,
Shanan Gwaltney Gibson, Ph.D., *Chair*
- Sampling Subcommittee, H. Allan Hunt, Ph.D., *Chair*

OIDAP Deliberation

Public Comment

Administrative Business

2:04 p.m. EDT

Adjourn

Leola Brooks, *Designated Federal Officer*

Call to Order:

Leola S. Brooks, *Designated Federal Officer (DFO)*

Ms. Brooks called the meeting to order and turned the meeting over to the Panel's Chair, Dr. Mary Barros-Bailey.

Welcome and Review of Agenda:

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

Dr. Barros-Bailey informed the attendees that they may locate the agenda on the Panel's website and she reviewed the agenda for the panel meeting.

Chair Report:

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

Dr. Barros-Bailey anticipated that the Panel's annual report would be complete and available to the public within three weeks. She announced the formation of a new subcommittee, chaired by Dr. Abigail Panter, focusing on data collection. She also announced a change in the date for the next teleconference, to Monday June 4 at 10 a.m. EDT.

Director's Report:

Sylvia E. Karman, Director, *Office of Vocational Resources Development*

Ms. Karman gave the Panel some information about the background of the Senior Research Psychologist, Jone Papinchock. She also introduced new members of OVRD recruited from other areas of SSA. Ms. Karman announced that she has received approval to hire two Industrial/Organizational Psychologists, and she anticipates that SSA will post those positions later this spring.

Ms. Karman updated the Panel on the following project activities:

- Memorandum of Understanding between SSA and the Department of Labor's Employment and Training Administration – Legal counsels in both agencies are reviewing revisions and she anticipates that the document will be ready for signature in May of 2012.
- Legal Standards – The final paper is under final review by SSA's Office of General Counsel.
- Usability Standards – Staff is preparing a workshop for professionals who are joining the project or will be working on the project.
- Disability Evaluation Constructs (DEC) – The DEC identified the vocational and functional constructs that SSA applies in the assessment of claimants as well as constructs or concepts that have been recommended to SSA. OVRD developed a methodology for classifying and filtering the information. The OIS Development Workgroup served as raters and OVRD is completing the final paper.
- Occupational Medical-Vocational Study – OVRD will complete quality reviews in two weeks and has begun the final analysis of the initial level results.
- Collaboration with other federal agencies – Project staff briefed the Bureau of Labor Statistics (BLS) on the Occupational Medical-Vocational Study. BLS officials briefed SSA on their national compensation survey so that SSA can consider its potential usefulness in OIS development. OVRD is also working with the Office of Personnel Management on an inter-agency agreement to bring their experts in to work with OVRD later this spring.
- Work Taxonomy Development – The Industrial/Organizational Consultants have produced a set of reports addressing various methodical issues and provided consultation on the development of a Request for Information (RFI). On March 1, SSA posted the RFI in order to identify potential availability and capability of vendors.
- Blanket Purchase Agreement with ICF International – Under Call 003, ICF has conducted interviews with a number of federal agencies on various protocols for data collection.

In response to Dr. Schretlen's question about how the DEC will inform the work taxonomy, Ms. Karman gave some examples of how it might be used, but explained that OVRD is still working through the methodological issues involved with taxonomic development.

Welcome Remarks:

David A. Rust, *Deputy Commissioner, Retirement and Disability Policy*

Mr. Rust announced that Richard Balkus retired and Bob Weathers, the previous Acting Associate Commissioner, entered SES training. He introduced David Weaver, the new Acting Associate Commissioner, and explained that Mr. Weaver was the Deputy Associate Commissioner in the Office of Retirement Policy.

Mr. Rust stated that the occupational information development effort was discussed at the Ways and Means Committee hearing.

Mr. Rust explained that SSA is under a tight budget situation and his component is down about 100 people, but the Commissioner did grant two hiring exceptions for the OIS project. SSA also continues to explore working relationships with other agencies.

David Weaver, *Acting Associate Commissioner, Office of Program Development and Research*

Mr. Weaver emphasized the importance of the disability programs by presenting some statistics on disability beneficiaries. He expressed that he is looking forward to working with the Panel.

In response to a question from Mr. Hardy, Mr. Rust explained that there is Congressional scrutiny about expenditures and continued uncertainty about the fiscal year 2013 budget.

In response to a question from Dr. Barros-Bailey about the renewal of the Panel charter, Mr. Rust said that he would get back in touch with the Panel on that issue. Dr. Barros-Bailey thanked Mr. Rust for his staffing efforts.

Director's Report (continued):

Sylvia E. Karman, *Director, Office of Vocational Resources Development (OVRD)*

Ms. Karman then returned to respond to questions and comments from Panel members.

- Dr. Gibson complimented the DEC documentation and commented that documentation of the entire DEC list and process would facilitate future consideration of items removed because they do not currently apply to disability adjudication.
- Dr. Gibson asked Ms. Karman how the budget situation may affect the project and Ms. Karman explained that there could be a negative impact on the speed of certain project activities.
- In response to a question from Dr. Creswell, Ms. Karman clarified that OVRD would share the Call 003 draft report with members of the Panel.
- Dr. Sanchez explained that in his opinion, adding permanent internal resources to the project would have more impact on the pace of the project than temporary resources. Dr. Gibson added that she believes that all design decisions related to the OIS should be made internally in order to protect the strategic direction of the project.
- In response to a question from Dr. Barros-Bailey, Ms. Karman said that the investigation of existing occupational information systems, the Call 003 report, and the Phase IV paper

for the Occupational Medical-Vocational Study would be posted on the project website. She also plans to post a description of the legal standards.

- In response to another question from Dr. Barros-Bailey about whether the research and development plan has changed, Ms. Karman said that the project is adhering to the same timeline.
- Dr. Schretlen asked whether development of the taxonomy could occur in-house. Ms. Karman responded that the seed of it would need to be in-house and SSA will continue to collaborate with other federal agencies and the Panel.
- Mr. Hardy asked when OVRD would complete the DEC and Ms. Karman responded that the Phase IV paper would be drafted in May. In response to a question from Dr. Barros-Bailey, Ms. Karman explained that SSA would not publicize this work until the public can view it in context with the work taxonomy.
- In response to questions from Mr. Hardy, Ms. Karman explained that SSA will want to test various data collection methods and it will need Industrial Psychologists to advise the best way to measure and reflect mental-cognitive aspects of work.

Subcommittee Reports – User Needs and Relations Subcommittee

Janine Holloman, *Chair*

Ms. Holloman stated that the Subcommittee has had one meeting since the last report. Two of the Panel members have given presentations to stakeholder organizations during that period and presentations are scheduled in April and May.

Subcommittee Reports – Work Taxonomy/Instrumentation Subcommittee

Shanan Gwaltney Gibson, Ph.D., *Chair*

Dr. Gibson stated that very few activities have occurred that included all members of the subcommittee, but they look forward to providing future feedback on OVRD activities.

In response to a question from Dr. Panter, Dr. Gibson commented that the DEC will be integral to work taxonomy development. In response to a question from Dr. Schretlen about how much work is involved in developing a taxonomy, Dr. Gibson explained that this is contextual but is likely to be time consuming for SSA. Dr. Sanchez added that identifying reliable measurements would be challenging.

In response to questions from Dr. Creswell and Mr. Hardy, Dr. Gibson and Dr. Sanchez provided some information about work taxonomy and various data collection approaches.

Dr. Schretlen asked whether empirical literature has identified those constructs that are more susceptible to biases of reporting. Dr. Gibson explained that literature exists on differences in ratings between incumbents and experts. Dr. Sanchez added that literature suggests that it is more difficult to obtain reliable ratings from incumbents on human attributes than it is to obtain information about activities.

Subcommittee Reports - Sampling Subcommittee

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

Dr. Hunt explained that two national databases, the Occupational Employment Statistics and the American Community Survey, have been the focus of the subcommittee's thinking because they represent different strategies and possible sampling frames. The subcommittee has been meeting monthly by telephone to review these sources and others. Dr. Creswell and Dr. Schretlen developed a draft paper identifying questions that must be answered in order to develop a specific sampling plan. The subcommittee expects to have recommendations on sampling frames and strategies soon.

Deliberation

Dr. Barros-Bailey invited the Panel's input on areas of consideration that are specific to their charter. The Panel members discussed the possibility that their role has evolved over time as SSA has made progress on the project. Dr. Hunt suggested that the Panel should now be following SSA's lead and Dr. Sanchez agreed that the need for advice has decreased. Dr. Sanchez expressed concern that there might be a perception that the project has more resources than it actually has. Ms. Frugoli suggested that some of OVRD's recent work would inform what the subcommittees do in the future.

Public Comments

Tom Sutton, *National Organization of Social Security Claimants Representatives*

Mr. Sutton expressed concerns that the Panel's work does not seem transparent. He cited difficulties with the teleconference number and the acoustics at the meeting. He also expressed concern that SSA has not posted various documents on the OVRD website.

Jeff Truthan, *SkillTRAN*

Mr. Truthan asked the Panel to consider the needs of the rehabilitation community when developing the OIS. He suggested an independent group of people should develop the taxonomy with oversight by SSA. Mr. Truthan reported that many DOT occupations have a decreasing number of people working in them and SSA will need to make decisions about whether an occupation has enough workers to warrant study. Mr. Truthan suggested that occupational employment statistics reported by employers are most useful but SSA could also use work history information in its sampling plan.

Lynn Tracy, *International Association of Rehabilitation Professionals*

Ms. Tracy said that IARP is writing up the results of their survey on past relevant work. She expressed concern about only collecting data on the jobs most commonly held by claimants because the reason for the prevalence of those jobs is unknown. She encouraged SSA to use vocational rehabilitation professionals and on-site job analysis as the preferred data collection method and suggested that there are creative ways to use technology. Ms. Tracy also suggested that SSA should hire contractors who have subject matter expertise.

Dr. Barros-Bailey asked Ms. Tracy whether she has seen data on how often vocational experts give testimony not based on the DOT and Ms. Tracy gave some examples of when that might occur.

Cynthia Grimley, *American Board of Vocational Experts*

Ms. Grimley stated that it was difficult to understand the proceedings without attending the subcommittee meetings because there was little deliberation between Panel members at the meeting.

Dr. Barros-Bailey asked Ms. Grimley whether she has seen data on how often vocational experts give testimony not based on the DOT. Ms. Grimley explained that she develops data through labor market surveys.

Administrative Business

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

The Panel approved minutes from the previous two meetings. They determined that they could not vote on the Operating Procedures because the Designated Federal Officer needs to add language explaining the Panel procedure to obtain public comments before making recommendations. Dr. Gibson requested that the Call 003 report be added to the agenda for the teleconference on June 4 at 10 a.m. Eastern Time. Dr. Barros-Bailey said that she would send members an e-mail in a month asking them for agenda items and she will be in close contact regarding their chartering.

Adjourn

Ms. Brooks adjourned the meeting at 2:04 p.m. EDT.

Certification:

I, Leola Brooks, Designated Federal Officer for the Occupational Development Advisory Panel, hereby certify that the above minutes accurately describe the Quarterly Meeting of the Panel held on March 22, 2012.

Leola Brooks

Designated Federal Officer