SOCIAL SECURITY ADMINISTRATION

OCCUPATIONAL INFORMATION DEVELOPMENT

ADVISORY PANEL QUARTERLY MEETING

JUNE 11, 2009

HYATT REGENCY - McCORMICK PLACE

CHICAGO, ILLINOIS

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12

13   C O N T E N T S

14 ITEM:

15 --

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

2   MS. TIDWELL-PETERS: Welcome to the final

3   day of the third quarterly meeting of the

4   Occupational Information Development Advisory Panel.

5   My name is Debra Tidwell-Peters, and I am the

6   Designated Federal Officer. I would like to now

7   turn the meeting over to Dr. Mary Barros-Bailey, the

8   interim chair. Mary.

9   DR. BARROS-BAILEY: Thanks, Debra.

10   Good morning, everybody.

11   We are now in our last half day of our

12   third quarterly meeting, and I would like to just

13   review the agenda for the day. We are going to be

14   starting with the project director's report with

15   Sylvia, and then continue on to subcommittee reports

16   by Tom Hardy in terms of DDS, and also the

17   transferable skills analysis. And then end with the

18   last subcommittee report in terms of taxonomy

19   classification by Mark Wilson.

20   We will take a break. It's going to be a

21   longer break, because we need to check-out by noon.

22   You can either leave your luggage with the bell

1   captain or bring it into the room during the break,

2   and then go on to Panel discussions and

3   deliberations, and end at noon.

4   So I will just turn it over to Sylvia.

5   MS. KARMAN: All right. Just one of the

6   things we do is -- and you will find -- Panel

7   members will find that we have left for you all a

8   document that says "Social Security Administration

9   Update to the Occupational Information Development

10   Advisory Panel, Third Fiscal Quarter of 2009." And

11   basically, the document, you know, goes through

12   issues that were collected as action items at the

13   Atlanta meeting -- panel meeting that we had

14   April 27th through 29th. And so I'm just going to

15   walk through some of these things.

16   One of the things we were asked about was

17   our short-term project. The short-term project is

18   one in which we have an evaluator, contractor who is

19   evaluating the existing data that another company

20   has been collecting that is based on the DOT to

21   determine whether or not those data and their

22   methods can be inserted into the Social Security

1   process in the interim while we're developing

2   something for long term.

3   We received a report from ICF

4   International, who is the evaluating contractor

5   about the information from Career Planning Software

6   Specialist, Incorporated. We reviewed the report

7   and submitted comments back to ICF, and we have

8   extended the period of performance on the evaluation

9   contract for an additional 30 days to allow ICF to

10   make the changes that we had discussed with them

11   about a final report. We're hoping to receive that

12   by June 30th.

13   A second effort that our team is working

14   on for this project is an upcoming study on the

15   occupational and medical vocational information in

16   files -- in claimant files. We published a

17   presolicitation notice on May 15th in Federal

18   Business Opportunity's web site. We're expecting

19   that we will be able to award a contract once we

20   receive proposals in July or August. And there is

21   anticipated to be a six month performance period for

22   the contract. It may be finished sooner, but there

1   is a six month performance time.

2   Basically, we're looking to collect --

3   this is the study that we have been talking about

4   where we're going to look at past work -- a work

5   history of claimants, and also the vocational input

6   into the claim to see what our CRC levels,

7   limitations these individuals had; what type of

8   input was made for the claim at step five with

9   regard to, you know, the outcomes for is it

10 transferable skills. You know, if it was a denial

11 that is a framework denial. What jobs were cited as

12 examples of work this individual could do at both

13 the DDS level, the initial level, and at the

14 appellate level. So anyway, that's what we're

15 working on there.

16   Also, you will see that we have some

17 feedback from the vocational experts. During the

18 presentation before the Panel in April, vocational

19 experts Lynne Tracy and Scott Stipe gave us a wish

20 list; and we recreated the wish list for Panel

21 members here so that you can see what -- in case we

22 didn't catch all of it, we listed this here. Of

1   course, that will be -- these things will be

2   addressed in our final report.

3   We also have a working paper that we have

4   completed. You all have copies of this working

5   paper. It's about developing an initial

6   classification system. That was also the subject of

7   the presentation that RJ Harvey gave us during --

8   Tuesday for our subcommittee meetings.

9   And we have also a response regarding

10   reasonable accommodation. There was a question at

11   the April meeting with regard to how Social Security

12   deals with reasonable accommodation. So you know,

13   we have provided that information here. I'm not

14   going to take the time to go through it at this

15   point. But for those of you who are interested in

16   knowing about how we handle that, that's cited

17   there.

18   Also, we have a follow-up on the working

19   paper for developing an initial classification. It

20   kind of goes along with the top 100 occupations --

21   soft occupations that we talked about at the April

22   meeting. R.J. Harvey went through and did an

1   analysis that is included in that working paper to

2   take a look at the variability among the DOT titles

3   that are within the SOC. So for those of you who

4   are interested in that, that is included in that

5   paper.

6   We have also been doing outreach, and in

7   this particular case we -- let me see -- oh, well,

8   you already know this. They have already appeared.

9   So anyway, there was a question, apparently, about

10 outreach. So we're responding to that, and NADE and

11 NCDDD have already appeared.

12   We anticipate asking other organizations,

13 as we move along, to present to the Panel if they

14 are so interested, and if the Panel is interested in

15 having them present. So you know, as -- perhaps for

16 upcoming meetings we may be having one or two groups

17 presenting. We're trying to be mindful of the

18 amount of time the Panel needs for deliberation, as

19 well as providing members of the public and other

20 organizations an opportunity to have time before us.

21   And we have held two expert round tables.

22 Many of you are aware of them. Of course this

1   Monday -- this past Monday we had held a mental

2   cognitive subcommittee, which is chaired by David

3   Schretlen. We held a roundtable of experts. David

4   described that for you all yesterday in the chair's

5   report; and we believe that we got enough

6   information from that that we will probably not be

7   doing a roundtable in July as we previously thought

8   we might be.

9   In May, the transferable skills analysis

10 subcommittee held a roundtable at the Social

11 Security headquarters in Baltimore, and that, of

12 course, was chaired by Tom Hardy, who is the

13 subcommittee chair. The experts that we had join us

14 there were Karl Botterbusch, Gale Gibson, Jeff

15 Truthan, Tim Field, and Patrick Dunn. Again, I

16 think some information about that -- results of that

17 Panel -- results of that roundtable will be forth

18 coming.

19   So that's where we are, and unless anybody

20 has any questions, I am finished.

21   DR. BARROS-BAILEY: Thanks, Sylvia.

22   At this point, I'm going to turn it over

1   to Tom Hardy. We had initially at first -- another

2   meeting to put together a subcommittee for DDS. We

3   no longer have that subcommittee, but there is still

4   some remaining work at that point, because it was

5   kind of an ad hoc group. So if you would report

6   just on the remaining activities in that before you

7   launch into the TSA subcommittee that would be

8   great. Thank you.

9   MR. HARDY: Thank you. Most of you will

10 recall that in -- I believe it was Washington where

11 we started talking about the need to get out to the

12 DDSs and the ODARs. I have been working with the

13 Administration in making that happen. By this point

14 everyone who has expressed an interest in going has

15 now been matched up with an office. Within 24 hours

16 you will be contacted to set up a time to go to the

17 DDS. So that will be occurring shortly.

18   There have been some hurdles to get over.

19 We seem to be over the hurdles at last. So that's a

20 good thing. I am glad to report that we are okay

21 with that now.

22   The other request for the trips to the

1   ODAR, that the same hurdles and maybe even a few

2   more still apply. One of the options that have been

3   given to us is to go to the Falls Church Appeals

4   Council. I'm going to kind of open up things to the

5   floor and ask if that will be an alternative to

6   visiting your local ODAR, or if there is still a

7   preference to visit local ODARs? I do not want to

8   speak on behalf of anybody, and I am going to

9   solicit comments.

10   DR. BARROS-BAILEY: Go ahead, Mark.

11   DR. WILSON: Differences between the local

12   ODAR and the appeals council -- I mean, are they

13   equivalent?

14   MS. KARMAN: Do you want me to see if I

15   can answer that? Okay.

16   My understanding is that the offer has

17   been for Panel members who are interested to come to

18   Falls Church where they have a national hearing

19   center. So you could be with a judge watching a

20   hearing or someone to do this over teleconference,

21   televised.

22   The other thing is that there will be -- I

1 think the time frame that they're looking at doing

2 this is in the next six weeks, I think. There

3 are -- there is a fair amount of training that is

4 going to be happening in Falls Church. And so the

5 top expert judges in the country will be at Falls

6 Church to provide training for new ALJs -- for new

7 Administrative Law Judges.

8   So actually -- the comparison then would

9 be you have a number of judges possibly to speak

10 with, you know, about your -- you know, the process,

11 the questions that you may have, as opposed to going

12 to a local office and watching a hearing. So it

13 depends on what your intent is. If you had -- if

14 your desire was to sit and simply watch, you know, a

15 case being handled and then, perhaps, speak with

16 staff afterwards or before -- and then the

17 comparison would be to go to Falls Church where

18 there is the Appeals Council, is also available and

19 you can speak with them, plus a group of judges who

20 are there to give the training. So that may be

21 available there.

22   So the other thing is that the Appeals

1 Council -- actually, the people on the Appeals

2 Council actually use the DOT, and therefore, don't

3 do the vocational expert opinion routine. So there

4 is some -- so you would have access to both. So if

5 that's something that interest you.

6   MR. HARDY: The only thing that you would

7 have to keep in mind is we're looking at traveling

8 for those of you coming from anywhere other than

9 Falls Church.

10   DR. WILSON: Sounds to me like it's ideal

11 in that, as I understand it, we would be able to

12 watch hearings if we wanted to, observe that

13 process, talk to judges who are from the field --

14 that has the other advantage of exposing us to some

15 other experts, maybe giving us more time to

16 interact. So I think it's great.

17   MS. KARMAN: I didn't mention this, but

18 Falls Church is in Virginia, it's in Northern

19 Virginia. So it is right outside of D.C.

20   DR. GIBSON: I was just going to concur

21 with Mark. I think that's a wonderful idea, and the

22 fact that Sylvia points out that these are the

1   actual users of the DOT themselves. So they have a

2   stake in whatever type of occupational information

3   system we develop. They can probably give us

4   feedback on that directly. It's very appealing.

5   MS. KARMAN: I don't mean to imply that

6   the ALJs don't have a stake in that. I'm just

7   saying that what you end up with is both ALJs and

8   staff who use the DOT and whatever software --

9   whatever kind of software; and ALJ's who have the

10 vocational expert testimony. So you have got both.

11   MS. SHOR: I think it's a really efficient

12 way to go. There is a kind of antiseptic quality to

13 it, which is there would be no claimants. I think

14 just to bear in mind this is a kind of spaceship

15 setting, because everything is by video. So it's

16 the way that -- that particular office does

17 business; but just for those of you to be aware it's

18 a very atypical situation, because there is no

19 waiting room of claimants. But for all sorts of

20 reasons of efficiency, I think it is the way to go.

21   MS. KARMAN: Here is another option too --

22 we can take that back and speak with our ODAR -- our

1 Office of Disability Adjudication Review

2 representatives. You know, we could -- you could

3 elect to do the Falls Church version soon and then

4 follow-up, perhaps, with a local office visit at a

5 future time, perhaps, this fall. So you know, I

6 don't think that our representatives were meaning to

7 say oh, you can only have one and not the other, so.

8   MR. HARDY: Well, it sounds like we have

9 agreement, then. You are the last one to speak on

10 the topic, Mary.

11   DR. BARROS-BAILEY: Sounds good.

12   So it sounds like if people are in

13 consensus and want to go ahead and do the Falls

14 Church that -- what Sylvia just mentioned in terms

15 of having that option available to the Panel,

16 followed up with a local option seems like a good

17 mix.

18   MR. HARDY: Okay. I will continue working

19 to make this fit within the schedules of only those

20 who have said they want to go, so this will not be

21 the whole group. So we will be talking about that.

22 Again within 24 hours you should be getting your

1 assignment for DDS visits, scheduled at your

2 convenience. And I think with that, once we have

3 the visit to Falls Church, we are taking care of

4 that action item.

5   DR. BARROS-BAILEY: Great. Thank you.

6   DR. GIBSON: Tom, can you briefly -- do

7 you have any idea what the dates are for Falls

8 Church?

9   MR. HARDY: No. What I think I will do is

10 I will probably work with Debra, and we will start

11 looking for available dates for Panel members, or

12 members who want to go; and then I will contact SSA

13 about what would be a good range of dates for them,

14 and we will make it fit like we did with the larger

15 panel meetings. Hopefully, we will do it within the

16 next -- I would think the next four to six weeks is

17 a doable time.

18   DR. BARROS-BAILEY: Thank you for closing

19 the loop on that. I appreciate that, Tom.

20   You are still on. Are you ready for the

21 TSA.

22   MR. HARDY: TSA subcommittee. I will

1   start with brevity is the soul of wit. I'm going to

2   be very funny.

3   TSA subcommittee has met, as Sylvia

4   indicated. We had a meeting at headquarters. We

5   faced somewhat of the same hurdles that you did with

6   the MRFC subcommittee panel in trying to get people

7   together on a very quick basis on a short notice;

8   but we had a very nice turn out. I have more notes

9   than I can possibly track.

10   We met on May 13th. Present, as noted,

11   were Gale Gibson, Jeff Truthan, Carl Botterbusch,

12   Tim Fields.

13   DR. BARROS-BAILEY: Pat Dunn.

14   MR. HARDY: And Patrick Dunn. I always

15   forget the name.

16   We met for an entire day. The agenda was

17   given out ahead of time. We tried to keep within

18   the parameters of the charge from the Commissioner.

19   We were trying to work within the existing code as

20   opposed to going into wish list or fantasy ideas of

21   what would look wonderful, so that we could, as

22   always, try to provide SSA with what their request

1 is.

2   In sum -- and then what I would like to

3 do, I would like to sit down and take my notes and

4 the notes of other attendees and kind of collate and

5 summarize everything that happened, because we did

6 not have that meeting transcribed per se. We talked

7 in very broad detail on a number of areas starting

8 with skill. What is a skill?

9   It was heartening in that the roundtable

10 responses all came in with pretty good agreement on

11 the definition that is currently in use, the

12 definitions that are used. There is a lot of

13 consistency in the responses across the Board.

14   We discussed skill for about an hour. We

15 discussed levels of skill, unskilled, semi-skilled,

16 skilled, the concept of no skill, which has come up

17 in other meetings as well. Then we went on to data

18 elements, discussed that in brief. And again, ended

19 with a great deal of agreement across discipline and

20 across expert. So that was a very heartening thing.

21   There was a lot of agreement that the

22 transferable skills process that we have right now

1   is working. It has been refined over the years and

2   what my take away was, we're probably going to still

3   be looking at pretty much the same kind of thing.

4   It's going to become more iterative as we look at

5   the information that this committee comes up with to

6   populate the new information system.

7   At this time what I will do is I will

8   summarize those notes. As an action plan we are

9   going to begin doing an exhaustive literature

10   review. And "exhaustive" is in capitals.

11   Exhaustive. There is a lot of literature out there.

12   So I'm going to be working with the workgroup to try

13   and pull some executive summaries, review everything

14   that we can get our hands on, and probably start

15   working with Mark and the taxonomy group on pinning

16   down a few definitions; and that would be my report

17   at this time. Any questions?

18   DR. SCHRETLEN: You said there is pretty

19   good agreement about what skills are. Could you --

20   can you give us just -- because this is not my area.

21   What is it, a general work definition? What are

22   examples of skills?

1   MR. HARDY: I think you are very skilled.

2   DR. SCHRETLEN: Yeah, but tell us

3   something concrete.

4   MR. HARDY: There is an actual definition

5   in the Regs that we have referred to in -- a working

6   definition might be -- and not speaking for the

7   Panel or the administration, just something that we

8   might be able to agree on. A skill is knowledge of

9   a work activity which requires the exercise of

10 significant judgment that goes beyond the carrying

11 out of simple job duties and is acquired through

12 performance of an occupation, which is above the

13 unskilled level as defined. It is practical and

14 familiar knowledge of the principles and processes

15 of an art, science, or trade combined with the

16 ability to apply them in practice in a proper and

17 prudent manner. This includes activities like

18 making precise measurements, reading blueprints,

19 setting up and operating complex machinery. A skill

20 gives a person special advantage over unskilled

21 workers in the labor market. It is kind of

22 imprecise. General definition.

1   MS. KARMAN: One of the things -- now that

2   you have read that, one of the things that I

3   remember from that meeting was that we discussed

4   skill level, and getting that complexity of work.

5   And we did discuss the prospect of, you know, how

6   valuable is it for SSA to have unskilled? You know,

7   is there such a thing as work that is not skilled?

8   Should we be thinking in terms of low complexity,

9   medium complexity, high complexity, as we have been

10 discussing in our subcommittee, the mental cognitive

11 subcommittee?

12   So just throw that out there. I don't

13 know, Tom, if you want to make a comment about that

14 or not.

15   MR. HARDY: Much as you discussed, how can

16 a person -- what is the floor for some behaviors?

17 Getting out of bed, the ability to get out of bed.

18 The same thing could be applied, obviously, to a

19 skill, you know. At some point we have to establish

20 a floor and also do a cut that says well, is that a

21 trait? Is that a task? When do these pieces add up

22 to become a skill, and where do you draw that line?

1   That's similar to the taxonomic issue;

2   but, again, it comes back to it's going to be

3   iterative as we move ahead with the information that

4   we're putting in here and start to classify.

5   Because to fit within a skilled definition we're

6   going to have some level of complexity; but

7   conversely, you can look at any occupation and you

8   have to say, is there a skill there? Right now we

9   say things like -- the classic examples have always

10   been ditch digger. You know, that's unskilled. Is

11   it unskilled, or is it low skilled? It's going to

12   depend on how we define skill.

13   Does that make sense to you?

14   DR. SCHRETLEN: Yes, it does. And I

15   just -- I can appreciate that this is a very complex

16   area, hard place to make decisions because they're

17   sort of conceptual issues of where we make cut

18   points. Then, there is also practical issues.

19   What's going to help us in decision making?

20   You know, having a floor might be very

21   useful for certain signs like -- you know, like it's

22   unambiguous -- somebody is unambiguously allowed if

1 they can't reach some floor. It's not going to help

2 differentiate people who are closer to the grades.

3 So I can imagine that.

4   I mean, I think that -- when I think just

5 intuitively of unskilled, I sort of think of low

6 skilled. And like, you know, lowest quartile of job

7 complexity, and semi-skilled is sort of somewhere in

8 the middle. Skilled is somewhere beneath kind of

9 professional high level complexity, but I don't

10 know.

11   MR. HARDY: It presents a lot of the same

12 problems I think you are grappling with. I look at

13 it as somewhat of a -- trying to translate one

14 language into another. And you don't really have

15 the words per se. You can get the sense and the

16 feel for it. Sometimes you are missing the exact

17 from here to here.

18   Skill is defined -- and we need to stick

19 within certain definitions -- and skill is defined

20 throughout the Code of Federal Regulations as well.

21 We have to stay within certain lines and make sure

22 that we are not overstepping our charge, because we

1   have a very specific charge. We cannot change that.

2   I think what's going to happen is as we

3   start to build into the content model, that

4   information, as applied, may need some changes.

5   That's why I'm trying to keep a close eye on how

6   those affect the definitions that we must stay

7   within.

8   DR. ANDERSSON: Can you repeat the

9   definition?

10   MS. LECHNER: Is this the federal?

11   MR. HARDY: This is the federal.

12   A skill, knowledge of a work activity,

13   which requires the exercise of significant judgment

14   that goes beyond the carrying out of simple job

15   duties, and is acquired through performance of an

16   occupation, which is above the unskilled level,

17   which is defined as requiring more than 30 days to

18   learn. It is impractical, familiar knowledge of the

19   principles and processes of an art, science, or

20   trade combined with the ability to apply that in

21   practicing in a proper and approved manner. This

22   includes activities like making precise

1   measurements, reading blueprints, setting up and

2   operating complex machinery. A skill gives a person

3   special advantage over unskilled workers in the

4   labor market.

5   And oftentimes I think it's that last

6   sentence that we kind of start to hang on.

7   DR. ANDERSSON: It's a pretty high hurdle.

8   MR. HARDY: Yes.

9   DR. ANDERSSON: It's way beyond what I

10   think David was talking about.

11   DR. BARROS-BAILEY: David, you were going

12   to say something.

13   DR. SCHRETLEN: I just also notice in that

14   rereading of it that there is an element in there --

15   that a skill is something that's acquired on the

16   job.

17   MR. HARDY: It can be.

18   DR. SCHRETLEN: That there is a real sort

19   of procedural element to it, sort of refining ones

20   procedure.

21   MR. HARDY: Can be. Education may play a

22   piece in this.

1   And again, stepping back and looking at

2   the ways skills have been defined and utilized, they

3   often tie very closely into the SVP; and we were

4   talking about that Monday, I believe. SVPs, they

5   may be sometimes seen as a proxy for a skill.

6   DR. BARROS-BAILEY: And they -- the other

7   couple elements that have also been traditionally

8   included in there are work fields and MPSMS from the

9   DOT. There was pretty good consensus among the

10   group that in terms of the strongest of those

11   elements was those work fields, that those needed to

12   be further developed in terms of representation in

13   the labor market. That was, I think, one of the

14   strongest consensus among the group was the element

15   of work fields.

16   MR. HARDY: I felt that was unanimous.

17   DR. BARROS-BAILEY: I did too.

18   MR. HARDY: Unanimous with the caveat that

19   they need to be reworked, perhaps, expanded. Again,

20   that's something that we are going to have to take a

21   look at as we start infusing the data collection

22   element as to how those go into these elements that

1 become part of transferability of skills.

2   DR. ANDERSSON: The word that jumped out

3 at me when you were reading this was the word

4 "significant." There must have been a reason why

5 they put that word in there. I think they're

6 purposefully putting the hurdle so much higher than

7 I would personally, if I think about it.

8   MR. HARDY: Part of that goes back to how

9 a case is adjudicated at certain levels. After you

10 reach a certain point, you need to be looking at

11 transferability of skills. Skills have to be

12 present first off to be transferable; and the way

13 claims are adjudicated right now we're looking at

14 some occupations that are not considered to have

15 requisite skills that can transfer. So there has to

16 be a cut off both high and low.

17   MS. LECHNER: It occurred -- occurs to me

18 as I listen to that definition that there is maybe

19 an emphasis on the concept that it's the knowledge

20 of something. And I wonder if as we write this

21 definition going forward we should give some thought

22 to -- when I think of a skill I think of not only

1   the knowledge of it, but being able to execute it.

2   So I could read a book about how to do

3   plumbing, for example, you know, some plumbing

4   skills or you know, the knowledge that I have in my

5   field is the manual therapy skills that physical

6   therapist use on a daily basis. I can read about

7   it. I can pass a written test. But it's not until

8   I am out in the field and have done this and used my

9   hands and have developed that manual skill.

10   I think a lot of the -- the occupations

11 that -- that SSA will be dealing with or could be

12 dealing with would be occupations that there is some

13 level of manual skill involved or execution of

14 manual tasks. So we -- you know, I would like for a

15 definition that we write to say it's not only the

16 knowledge of, but the ability to execute the skill.

17   MS. KARMAN: I have two things that come

18 to mind to me, Debra. One is that we're -- when we

19 talk about a definition, we're talking about a

20 definition so that we know what kind of data

21 collection Social Security might need to consider to

22 be sure that it has what it needs to move forward

1 with skills assessment. So we're not talking

2 about -- just to make it clear on the record, that

3 we're not talking about changing the Reg; and

4 everybody is clear about that on the Panel. I just

5 want to say that.

6   So when we have been discussing this,

7 we -- you know, we understand that skills come from

8 what somebody has performed. And so whether we

9 couch that in terminology that has to do with

10 knowledge, ability, you know -- but that's one of

11 the reasons why the Social Security definition goes

12 toward skills come from work, you know, that you

13 performed. In other words, just having read the

14 book I am not prepared to go out and do brain

15 surgery, you know.

16   So anyway -- so those are the two things

17 that come to mind for me. So in that even though we

18 recognize that the regulations makes this

19 distinction, as Gunnar has pointed out, and sets a

20 bar above unskilled, and makes a distinction --

21 autonomous distinction between unskilled and

22 skilled -- even though, I guess people will argue,

1 well, there is semi-skilled; but the point is it is

2 binary, you either have them or you do not.

3   That does not mean that we may not want to

4 be able to discern a continuum. So in other words,

5 do we want to set it up so that Social Security

6 might be informed about what the complexity levels

7 are for work, so that it can decide on its own

8 whether or not this definition is still applicable.

9 Do they still want to use that?

10   It may be that SSA will go back and say

11 anything below a certain level we are going to call

12 unskilled, because it does not rise to the level of

13 providing the person with an ability or advantage.

14 That's a policy issue. So I don't know if that, you

15 know, is helpful in understanding what we may want

16 to be recommending in terms of looking at complexity

17 levels.

18   MR. HARDY: I'm going back to SSR 82-41.

19 Determination that a job is unskilled. Unskilled

20 occupations are the least complex types of work.

21 Jobs are unskilled when persons can usually learn to

22 do them in 30 days or less. Obviously, that's

1   coming right out of the DOT.

2   And the next sentence says, the majority

3   of unskilled jobs are defined -- are identified in

4   Department of Labor's Dictionary of Occupational

5   Titles. It should be obvious that restaurant

6   dishwashers are unskilled. It may not be

7   self-evident that other jobs can be learned in 30

8   days or less. Then, it goes on and on.

9   There is information in here that we are

10 directed to use at this point.

11   MS. KARMAN: The -- the Dictionary of

12 Occupational Titles refers to the SVP definition as

13 SVP of one being 30 days or less. Social Security

14 calls that unskilled. The Department of Labor has

15 never had that definition from what I understand.

16 That's something that came from us. So just to

17 clarify that. Yes, they have got SVP of one, right,

18 equals this amount; but we're the ones who call it

19 unskilled.

20   DR. BARROS-BAILEY: Gunnar, you had a

21 comment.

22   DR. ANDERSSON: Yes. There is an issue

1   here in what you are saying and what the Regs say,

2   and that has to do with the issue of whether or not

3   you have done it in the past. Because by this

4   definition you don't have to have done it at all.

5   You just have to be able to learn it in 30 days. I

6   wonder if that applies to skill too. Because,

7   otherwise, how would you use this to look at

8   transferable skills? You know, you can't require

9   that people have done all the jobs. That doesn't

10   make any sense to me.

11   MS. KARMAN: Okay. We basically look at

12   what people have done in their past work and so that

13   establishes the baseline for what that person has

14   shown us that they're capable of doing. So we use

15   that as our metric for that individual. So every

16   job is rated at an SVP level of whatever, "X." You

17   know, the highest level of SVP job -- SVP of an

18   occupation you ever did was a four. That's your

19   skill level. Right.

20   So that's what our Regulations -- that's

21   how our Regulations take that to mean. So they're

22   doing the job, you know. They're learning to do the

1   job within 30 days, you know, or whatever the

2   interval is; but they're doing that on the job.

3   DR. BARROS-BAILEY: And through work

4   fields it's what they have done, and through MPSMS

5   is how they have done it. So that's how it gets

6   further defined in terms of skill.

7   MR. HARDY: Any other questions?

8   DR. BARROS-BAILEY: Mark.

9   DR. WILSON: I just wanted to say, as Tom

10 indicated that he wanted some help in this area,

11 definition of what a skill is. From the work

12 analysis standpoint and from the area of psychology

13 field in general, skill does tend to imply

14 proficiency -- some level of experience, things of

15 that sort. As far as -- obviously, we're going to

16 work with whatever the legal and policy requirements

17 are in terms of how Social Security defines skill.

18 But from a work analysis standpoint I very much

19 appreciated Shirleen Roth's presentation last time

20 sort of walking us through what TSA is.

21   I paid very close attention and one of the

22 important aspects of that seem to be very much

1   judgment in looking at the activities people have

2   performed in terms of actual work activities, tasks,

3   and things of that sort in one kind of work; and

4   then visually inspecting other descriptions, looking

5   for similarities, things of that sort.

6   One of the advantages of any new work

7   analysis system that we have is that a lot of

8   process, you know, could be mechanized. They could

9   set limits on this and say I want to look at jobs

10   that are similar to this job that I'm specifying.

11   Show me all of them. Then once they have those,

12   they could -- you know, they could much more

13   systematically explore them. So, you know, I think

14   we will be able to make Shirleen's job a little

15   easier and more systematic.

16   And any issue from a work analysis

17   standpoint as to what a skill is, we get back into

18   these definitional issues. I think you can take

19   almost any work descriptor and put the term "skill

20   at" in front of it, and from my standpoint it

21   becomes a skill. I think if you kind of read the

22   lines between that definition, it's some sort of

1   cluster or composite of maybe a number of things.

2   And again, there, it very well could be

3   the case as we collect these data that we will be

4   able to identify common work clusters, and in the

5   empirical sense identify, you know, what are

6   patterns of these proficiencies that people have.

7   You know, is there some composite of cognitive,

8   procedural, physical activities that tend to hang

9   together that we can invariably in systematic

10 scientific ways say, you know, this is a skill that

11 exist in the economy right now. So I think we will

12 be able to help, and I understand the definitional

13 issues are important.

14   MS. KARMAN: I have a question. I know we

15 briefly touched on this in the roundtable -- and

16 those of you who were there at the roundtable can

17 chime in and let me know if you heard something

18 different. I did not come away with our having

19 arrived at an understanding about this; but we

20 talked a bit about how do we get at something like

21 SVP? How do we go about doing that? Do we want

22 that?

1   And one of the things I was thinking about

2   was the extent of inference. SVP is an inference,

3   you know. We infer that if it took you this long to

4   do the job that there is this complexity level;

5   therefore, there is this sort of, you know, an

6   amount of skill associated with it.

7   And I don't know that to be true. I don't

8   know if any of us does -- or at least I certainly

9   don't. But -- so I'm wondering if anybody, you

10   know, Mark, Shanan, anybody else who has thoughts

11   about this, what you think about, first of all, the

12   notion of using something like SVP to get at skill

13   level. And if not that, why not? And what are your

14   thoughts about that? What else could we possibly

15   use as a marker?

16   Is there enough -- is the inference too

17   far to say well, you know, education level is

18   associated with skill level. I just -- I'm

19   concerned about that because we did talk a little

20   bit about education level, which is what the person

21   brings to the thing. They don't learn that on the

22   job. I'm kind of -- that's also market driven. And

1   we didn't talk about all of that. So I don't know.

2   MR. HARDY: I'm going to interject before

3   anybody answers, because I don't want to be

4   misleading when I say we agreed on everything. We

5   pretty much agreed on everything except SVP. I

6   think you are right. It wasn't even a disagreement

7   so much.

8   MS. KARMAN: No.

9   MR. HARDY: It was more of a, how do we

10 get our hands around something that's become such a

11 major proxy? And become such a major piece of

12 aggregation of occupation, and a major piece of --

13 on the person side, you get to that SVP. That's the

14 number and there it is. And for adjudication that

15 number becomes anchor points, as I am now learning.

16 That number becomes an anchor, and that's it. There

17 you are. And that drives how process goes.

18   So SVP becomes an extremely important

19 piece in the adjudication of claims. And as we

20 talked about what an SVP is and what it means, there

21 were suggestions of splitting it up. Making one

22 part of it education -- attained education, and the

1 implications or inferences you can take from

2 attained education.

3   There is also talk of breaking down

4 training level. Talk of the 11 point scale that

5 comes out of O*Net. There is a five-point scale

6 that's out there.

7   What about the presence of licensing and

8 certificates? What do they bring? What do they

9 add? Those become highly conceptual things, but for

10 such an important piece of the adjudication process

11 it is not something I think we go into lightly at

12 all. Because this is where things really hit the

13 road for claimant "X." So I would like to just put

14 that out there before we even start talking about

15 it.

16   Again, keeping in mind that we are working

17 within already defined parameters that we are not

18 changing. So we can maybe work around how we build

19 up into that, which is why I pay so much attention

20 to when you talk about what is a task versus a

21 function, versus a metafunction. Because all those

22 pieces still have to build back into a skill, and a

1   skill is probably one of the most important pieces

2   for the individual claimant, whether or not they

3   have one, and what it is, and whether it can be

4   transferred; and how we're going to track that from

5   occupation to occupation.

6   Don't forget, you are looking at an end

7   user who is going to in some fashion pull up an

8   occupation and say oh, that's got skill X, Y, and Z.

9   What other occupations have that? So this is a

10 really important piece. I don't think we can answer

11 about the questions now until we build in the

12 information gathering. That's why I step back and

13 say tell me how you are defining each of the pieces

14 of information you are gathering, because we're told

15 how those build into a definition of skill. So with

16 that caveat, I would like to hear what you have to

17 say.

18   DR. BARROS-BAILEY: I just want to add

19 kind of my understanding of not only the roundtable,

20 but also the subcommittee when we met earlier this

21 week.

22   In terms of the elements I thought there

1   was a pretty good consensus in terms of work fields,

2   in terms of the gerunds. What is it that we do

3   expanding those, updating those. How do you do it?

4   There were pretty good consensus there that we

5   needed to look at other aspects of it, not only the

6   MPSMS -- I forget what that stands for. You could

7   inform everybody since you have the revised handbook

8   down at the end of the table there, but also looking

9   at tools and technology from O*Net as a proxy for

10   some of that.

11   The softest area was the SVP area, and

12   really kind of researching that to a greater extent

13   not only within our own literature, but what other

14   systems have done such as Australian, New Zealand,

15   and Canada. They have addressed it a little bit

16   differently. So I think that is the area that we

17   need to work with from all -- for me, TSA becomes

18   very important, because in our -- in OIS, because

19   what -- it takes us from a pure trade sort to

20   looking at skill; but the elements that combine

21   together to define skill, or else we're just

22   sorting. We're not really looking at where somebody

1   is when you apply occupations, be physical,

2   cognitive, whatever and where they end up.

3   So for me in terms of the nucleus of what

4   we're putting together, skill becomes very important

5   at the center of that nucleus. So I don't know if

6   anybody else who is a part of the subcommittee or

7   was at the roundtable is understanding my

8   conclusions in the same way.

9   DR. WILSON: If you think about what SVP

10   is, it's sort of a complex composite score, and the

11   problem with composite scores is that they can sort

12   of be misleading sometimes in terms of exactly what

13   information is conveyed there. The way I always

14   like to explain this to students is do we aggregate

15   or disaggregate? What kind of things do we have to

16   worry about? So we have got these three students.

17   One student we're looking at the transcript, and

18   were particularly interested in three courses. And

19   so we look at these three courses for one student,

20   and we have to make a decision which student we're

21   going to admit into the program, whatever.

22   And we want to make it easy for the

1 decision maker. So we're going to come up with some

2 composite estimate of -- for each one of these

3 students so that we can make this decision. So

4 we're going to base it on these three courses, and

5 the first student gets a "C;" and so, obviously, the

6 composite for that student is going to be a "C."

7   The second student, same three courses.

8 Get a "B" in the first course, "C" in the second

9 course, then "D" in the third course. What's their

10 composite? Same thing, a "C."

11   The third student -- I was the third

12 student, by the way. I got an "A" in one course, a

13 "C" in the second course, and then failed the third

14 course. What's their composite? A "C."

15   Are these the same students? Are they all

16 depending upon the decision we're trying to make?

17 Are they all going to be equally the same? No, they

18 obviously are not. So what's missing here?

19   One is identification of the components.

20 Maybe all three of these courses shouldn't be

21 treated equally. There should be some sort of

22 waiting scheme involved that allows us to come to a

1   more accurate composite. Or if we really think

2   they're of equal value, perhaps, some indication of

3   variation along with some indication of whatever the

4   composite is. So we all get the same composite

5   score, but the first student I described, you know,

6   has a lower standard deviation than someone else.

7   So I think you are going down the right path in

8   terms of what really are the facets of skill that

9   we're interested in, and is it really useful to have

10   a composite, you know, score that we're going to

11   use. And for decision makers we have heard a lot

12   about that this needs to be simple. We don't have a

13   lot of time. So -- but from my standpoint, it also

14   needs to be accurate. It needs to be reflective of

15   a case where we're going to be able to make accurate

16   and consistent decisions.

17   And I just described to you the case

18   where, you know, if you looked at these three people

19   and all you had was this composite score, you

20   wouldn't think that there was any difference when,

21   in fact, there was quite a bit. So those are the

22   sorts of issues that I would be concerned about and

1 would add to this.

2   DR. BARROS-BAILEY: Tom.

3   MR. HARDY: Yes, if there is no other

4 comment -- I know we're running out of time. We

5 need to go into deliberation. Just so you know,

6 MTEWA -- machine, tools, equipment, and work aids

7 are instruments and devices used to carry out work

8 activities. That's a MTEWA.

9   To remind everybody of the worker

10 functions we call them -- I like to call them the

11 "I-N-G" words, Mary likes to call them the gerunds;

12 whatever you want. Those would be things such as

13 synthesizing, coordinating, compiling, computing,

14 mentoring, diverting, speaking, signaling. So those

15 are areas. Again, I just urge everybody as you are

16 looking at mental and physical, or worker trait,

17 remember these things are still going to be building

18 back up again into these larger categories.

19   And as I said, I will try and give you a

20 brief summary of the roundtable and where we are. I

21 will be doing some work on putting together the

22 existing literature and doing some summarization of

1 that and probably opening dialogue regarding

2 taxonomy. And that's the subcommittee report, which

3 is not as brief as I wanted it to be.

4   DR. BARROS-BAILEY: But great discussion.

5 I also thought that we came out of that roundtable

6 with an agreement that we would put together a

7 summary and send it back to the people who

8 participated in the roundtable to make sure that we

9 captured their input and it was accurate. So thank

10 you, Tom.

11   So we are on to taxonomy, Mark; and

12 classification.

13   DR. WILSON: Thanks, Mary.

14   A couple issues. Since our last Panel

15 meeting where I kind of brought you an update on

16 what the Taxonomy Committee has been doing, a couple

17 of events have taken place. Our DFO and interim

18 chair indicated we lost a member of the Panel who

19 was also a member of our subcommittee.

20   Jim continued -- wanted to continue with

21 the task that we outlined at the next -- at the last

22 Panel meeting and did so. I just wanted to echo the

1 sentiments of both Mary and Debra that we wish him

2 well. He was extremely helpful and was a useful

3 member of our subcommittee. So we're going to miss

4 him. But we consider that his activities in terms

5 of what he committed to have been fulfilled. So

6 Shanan and I are going to soldier on, on our own

7 from here on out. I suspect at least through the

8 next meeting.

9   In terms of what we said we were going to

10 focus on from the last meeting, just to kind of

11 remind you a little bit, we went through an

12 exhaustive literature search to look at existing

13 work taxonomies that were in the literature.

14 Identified, I believe it was eleven that we

15 presented to you last time. Requested that if you

16 were aware of any others that you would like us to

17 consider that you do so; and we didn't hear from

18 anyone. So I'm hoping that means that our

19 literature search was exhaustive and we found

20 everything that should be considered. That was

21 certainly our goal.

22   And even at this late date, I would make

1   the offer again if you are aware of any other work

2   taxonomy out there that you think needs to be

3   considered, we would be happy to look at that and

4   see whether or not it merits consideration.

5   But we did move ahead with our process.

6   We identified, as I said, eleven different

7   taxonomies, several hundred work taxonomy

8   dimensions. Just so that everyone is clear on this

9   point, when I talk about taxonomy, this is usually

10 the results of some sort of factor analytic

11 research. So each one of these taxonomies which

12 have anywhere from 15 to 40, 50 dimensions

13 associated with them, will have, you know, maybe by

14 a factor of ten items associated with each of those

15 dimensions.

16   So it represents fairly exhaustive

17 attempts to analyze work. And our first task, which

18 each of the three Panel members get, was to take the

19 work dimensions -- and we started with the CMQ since

20 it -- the factor analysis there yielded the most

21 number of dimensions. So we just thought it

22 efficient to put that in the left column of our

1 spread sheet, and then we systematically looked at

2 each additional taxonomy and tried to match it up.

3   It had dimensions that matched to one of

4 the existing CMQ dimensions that had been already

5 identified. If it did, we put it in the appropriate

6 row. If it had a -- when we were done with that, if

7 there were dimensions that left over that we

8 couldn't match, we dropped that to the bottom of our

9 list, and now those become dimensions that could be

10 matched to any subsequent taxonomy.

11   So we went through this relatively

12 laborious process and then had a subcommittee

13 meeting in Raleigh where Jim and Shanan and I

14 compared our list and each came up with our unique

15 list of dimensions. Dimensions that we didn't think

16 overlapped. And there was some variability there,

17 but there was also a striking amount of consistency.

18   So the next phase was to compare the three

19 sets of unique dimensions and combine them in sort

20 of a rational process. And we did that, and we did

21 a little wordsmithing, tweaking to different --

22 slightly different terminology used from one

1 taxonomic system to the next that we wanted to

2 correct.

3   So we completed that exercise, and

4 incidentally we went into some fact finding with our

5 own subcommittee and various others earlier this

6 week where we presented some of our initial results,

7 and circulated that around. And to prepare for that

8 fact finding, sort of began thinking ahead to the

9 idea that we're going to be writing a report. And

10 it's important to keep in mind for report writing

11 purposes, because we heard from a number of

12 distinguished members of the legal community that --

13 yesterday that we're going to be very transparent

14 here.

15   All of our records, everything we did at

16 each stage of this process, all of the Excel spread

17 sheets are -- so anyone can go back and retrace our

18 work if they want to second guess us, you know,

19 absolutely; knock yourself out. But the idea here

20 is that, just as you would in any job analysis that

21 would be used for any other purposes, we want it

22 fully documented. We want people to understand the

1   process and how we got to the point of making the

2   recommendations that we did.

3   So we came to agreement on what we felt

4   were the taxonomic dimensions that were unique, and

5   expressed them in a relatively consistent language.

6   Our next task was then to evaluate each of these

7   dimensions in terms of how useful it might be for

8   the Social Security Administration. And we defined

9   useful in the sense of trying to look at each of

10 these dimensions in terms of where it might provide

11 information on the people side.

12   So we didn't have, of course, at this

13 point, prior to this week, the presentations and

14 thoughts of members of the Panel on other

15 subcommittees that were dealing with people side

16 issues. So we created our own taxonomy of people

17 side cognitive, and physical, and interpersonal

18 issues; and we will probably now, because we have

19 what we suspect are better and more accurate

20 descriptions -- we may go back and tweak some of

21 this. But essentially, we evaluated each of the

22 existing dimensions in terms of their sensitivity or

1 providing of information for the person side

2 information.

3 And what we mean by that -- I want to make

4 clear here that the purpose of this exercise in

5 identifying these taxonomic dimensions is to inspire

6 item writing across a broad range of different

7 aspects of work. And we are under no illusion that

8 the set of dimensions that we provide is our input

9 into sort of an interim content model, are going to

10 be the actual work dimensions that emerge from data

11 collection.

12 We suspect that we have been very

13 conservative here, and we very much suspect that the

14 actual number will be smaller. And one way to look

15 at the skills issue we have been talking about in a

16 very real sense, the taxonomic structure of work is

17 about as good a place as any to start if you are

18 going to talk about, you know, what's a higher order

19 organization scheme for human skills, human

20 attributes, things of that sort.

21 Just as there are, you know, various

22 facets of human cognition or human physical

1   performance, these are empirical analysis of

2   whatever work descriptors we have is probably a good

3   a place as any to say, well, this is the underlying

4   taxonomic structure of work; therefore, these are

5   good as headers as any to describe them as sort of

6   major skill sets, planning, decision making, you

7   know, manipulative activity or whatever they happen

8   to be.

9   So we did that, and there you could have a

10   dimension provide information for however many

11   person side attributes that you felt were relevant.

12   So you didn't have to slide a dimension into one and

13   only one person side attribute. Dimension could and

14   oftentimes does provide information on more than one

15   aspect on the person side.

16   So we did that exercise and had that

17   information, which we will also report. And as you

18   would suspect, many of us felt, with varying degrees

19   of consistency, that some dimensions were more

20   useful and provided more information, more areas

21   than others. So in terms of deciding what aspects

22   to focus on where you might not spend as much effort

1   in terms of item writing, that may be of some use.

2   The final task that we conducted as part

3   of this process -- and because this really was more

4   of a psychometric exercise, this was limited to

5   Shanan and I; Jim didn't participate in this, but

6   we -- because of some of the discussions last time

7   and because of some of the questions that Tom has

8   had for us -- and I commented on this during our

9   Panel meeting this time, most people who are

10   involved in the process are really down at the item

11   level. They don't think in term of this underlying

12   taxonomic structure. That's important to academics.

13   It's important for research. It's important to be

14   aware of this stuff if you are going to be

15   systematic. That's not the way people use this

16   information.

17   We felt it was important to give people

18   some idea of what items might look like. So Shanan

19   and I, we randomly pulled out a few dimensions from

20   this rather sizeable list and the data people things

21   and other areas, and wrote a few items. These are

22   some examples of what items might look at that would

1   tap into each areas. And we felt that this would

2   help end users visualize what this system would be

3   like.

4   The trends and the -- I suspect our likely

5   recommendations are that you should have a common

6   metric of work descriptors. You have the same

7   information for every job. So are you going to have

8   that at the task analysis? Are you going to be able

9   to do at the same fine grade level of analysis TSA

10 with, you know, highly job specific tasks? No. I

11 think when you look at some of these items we

12 generated, they're sort of like meta tasks.

13   They're still something -- the worker

14 might not recognize any of these taxonomic

15 dimensions, and one wouldn't expect that they would.

16 If you ask them, you know, do you have to make

17 presentations to people? Do you have to know how to

18 operate a teleconference telephone system?

19   Those are somewhat generic, but I refer to

20 them as meta tasks, because I think it's easier for

21 practitioners to understand that terminology than

22 what would more commonly in the area of psychology

1 be referred to as a generalized work activity. It's

2 still somewhat behavioral. It's more generalized.

3   And the reason it has to be more

4 generalized is it has to apply to all work. We're

5 going to use the same yard stick for everyone. And

6 the reason that's so valuable is that some of the

7 issues around consistency and systematic examination

8 of all work in the work force, things of that sort,

9 become much easier if you have the same profile and

10 have machines assist you in that process. Prompt

11 you to consider work that you may not have thought

12 of that has similar skill patterns or skill sets

13 than what you might get by getting down the weeds

14 and examining task statements for various kinds of

15 work.

16   So we have completed that. We see as our

17 role now a couple of things. One, as I said, maybe

18 tweaking that second stress test, if you will, of

19 dimensions based on the information we have received

20 over this week to maybe refine this -- our

21 understanding of the sensitivity of these dimensions

22 as far as providing information for the people side.

1   Helping Tom and his group as much as we

2   can with some of these definitional issues in terms

3   of how and what the work side analysis might look

4   like in terms of helping them identify various

5   things like, you know, what is a skill versus what

6   is a task versus things of that sort and writing a

7   report.

8   DR. BARROS-BAILEY: I have a question.

9   You had an example of an item, "do you have to make

10   presentations to people?" I'm sitting in the five

11   level scale that we have. That would be a level

12   two?

13   MS. LECHNER: In terms of the levels of

14   that -- those initial diagrams, Mark.

15   DR. WILSON: Yeah, I'm sorry. I am having

16   a senior moment here. Yes, absolutely.

17   DR. BARROS-BAILEY: Could you give an

18   example of what a level one would be within that

19   context; and then maybe psychometrically, if

20   anything, what would be lost between a level one and

21   a level two -- going up to a level two.

22   DR. WILSON: Okay. Good question.

1   To answer your second question first, what

2   would be lost would be -- level one tends to be in

3   the language of the worker in terms exactly the way

4   they would understand them. So what we would

5   generally refer to as task statement would be highly

6   specific. It might include, you know, a specific

7   tool or some sort of work aid. It might specify

8   something that was highly specific to whatever the

9   industry, things of that sort were.

10   But you raise an interesting point, Mary.

11   And it was what I was trying to get at yesterday

12   with the microscope metaphor in turning cranks here.

13   With all due respect to Dr. Harvey, there

14   really aren't five points. I mean, there are

15   whatever -- I think it's important to -- level one

16   is the only level that really exist in terms of how

17   workers perceive things. There is a certain amount

18   of variability in all of the points. To say that

19   they're of equal level, comparable granularity is

20   pretty easy to poke holes in.

21   That being said, the difference between

22   level one and level two tends to be the removal of

1 any organizational industry specific kind of

2 language. So level two, I think, is still

3 recognizable to incumbents, but it is probably not

4 the way they would talk about their work. So for

5 example, to make presentations to people might

6 actually be four tasks. Things like using Power

7 Point to develop a series of slides on farming, you

8 know. Use clicky to present presentation to

9 farmers.

10   So it would tend to have some kind of

11 context oftentimes embedded in it. It would be more

12 granular. It would take the task of making a

13 presentation, maybe breaking it down to five or six

14 various activities, all of which get rolled up into,

15 you know, making presentations.

16   DR. BARROS-BAILEY: Thank you. And it's

17 my understanding that what we have now, what we're

18 looking at now is level one, and level two, and

19 level three. So it makes it very hard to compare

20 across. Is that my understanding, Shanan?

21   DR. WILSON: In terms of the DOT?

22   DR. BARROS-BAILEY: Yes.

1   DR. GIBSON: Also, the DOT definitely

2   gives you level one. It gives more examples when

3   you are making presentations of level one items at a

4   more complex job. For example, giving budget

5   presentation to executive board on a quarterly basis

6   might be a job that a CFO would have. That could be

7   subsumed under making presentation to others,

8   though.

9   So if he gives budget presentations to the

10   executive board on a quarterly basis, that is at a

11   different level, obviously, than a floor supervisor

12   who reviews productivity goals in a group setting

13   for his subordinates. They would both have that,

14   but when it was rated, it would be rated at a

15   different frequency, different level of difficulty

16   and complexity. By getting them at the makes

17   presentations to others, we are able to then compare

18   across jobs, which is what you were asking there.

19   When you are getting at that molecular level, you

20   can't compare or find any similarities of work,

21   which essentially makes cross job skills comparisons

22   impossible.

     1   MS. LECHNER: One of the things that

     2   strikes me is -- listening to Shanan and Mark speak

     3   is that going -- we are kind of going -- flipping

     4   back to that whole issue of linking physical demands

     5   or cognitive demands to tasks. If you take that

     6   example of makes presentations to others, you could,

     7   I think, still link the physical demands. I know at

     8   least from the physical standpoint, we could link

     9   the physical demands that are typically required to

    10   make presentations. And that may be of some use as

    11   we think about transferability.

    12   If they can transfer a skill, what are the

    13   physical and cognitive demands to perform that --

    14   not skill; but if they can -- if they can transfer

    15   that ability to make presentations, then what are

    16   the cognitive and the physical and the emotional

    17   demands required to make presentations? You kind of

    18   see where I'm going with that maybe?

    19   MS. KARMAN: Yes, I'm wondering if I'm

    20   understanding this right. Because when I think of

    21   an occupation -- and let's say, you know, we have

    22   identified, you know, ten skills that go with that

1 occupation, and there are ratings for the physical

2 demands and the mental cognitive demands of that

3 same occupation when there is -- when the user is

4 assessing whether or not an individual can do that

5 occupation, given his or her limitations presuming

6 that you know what their skill level -- for sake of

7 the argument, you know what this is.

8   You -- the physical and mental demands

9 are -- are attached or associated with the

10 occupation, and so therefore, as you search on the

11 skill set for occupations and they come up, you can

12 also be determining whether or not certain physical

13 or mental limitations can be taken into

14 consideration, and that would also pull those things

15 off the list, or you are including them.

16   So in other words, the physical and mental

17 demands associated with the occupation, not

18 necessarily with the skill set. Am I -- I mean,

19 that doesn't preclude a factor analysis or an

20 analysis of what clusters with those things. But

21 typically, we see them packaged with the occupation.

22 Am I being too simplistic about this?

 1   MS. LECHNER: I guess I just have this

 2   vision of a searchable database. And if -- if I in

 3   my past work have performed one occupation, then I

 4   suppose through factor analysis we could search by

 5   other relevant occupations. But then I also am

 6   wondering is there a possibility for -- if I have

 7   done work that involves these types of, you know,

 8   making presentations to others on that level, and if

 9   I entered those things in or choose those things

10   from a pick list, could it pull over -- could this

11   search engine pull over these occupations with those

12   associated pieces? You know, that's just sort of

13   the thing that's kind of floating around my head.

14   DR. BARROS-BAILEY: Gunnar.

15   DR. ANDERSSON: I was thinking that, you

16   know, one way of dealing with this is to start from

17   the point of view of what you can't do. So if you

18   are describing jobs in terms of checklists -- say,

19   you have a physical function checklist that says I

20   can do this; I can do this; I can do that. Then you

21   have a psychological checklist, and you have a

22   skills checklist. Then you can run it anyway you

1   want.

2   You start -- you could start by looking at

3   the physical functioning and say, well, all these

4   jobs are now excluded. Then you run the next set

5   and say well, psychologically all these jobs are now

6   excluded. Then you get to the skill set and say

7   these are the remaining jobs. You can do it. And

8   there is probably dimensions I haven't thought

9   about, but --

10   DR. BARROS-BAILEY: Mark.

11   DR. WILSON: Yes. You know what we're

12   talking about is a very famous problem in the field

13   and that's, how does one go about linking the world

14   of work and world of human attributes. The methods

15   for doing this are, I think, up to us to decide; and

16   as I said a number of times, I think it would

17   behoove Social Security Administration to develop a

18   sort of research and development unit that would

19   empirically address a lot of these questions.

20   And so one way to do this would be to --

21   you know, whatever database we come up with and

22   describe work we would collected that on whatever

1   number of jobs. And then someone else on the person

2   side would go out to people who hold those same jobs

3   and assess them, and then, you know, through the

4   power of multivarious statistics we could establish

5   empirical linkages. Now, the criticism with that

6   approach is what's referred to as the migration

7   hypothesis. It assumes that people in a particular

8   job tend to migrate to those jobs that best fit

9   their attribute profile.

10   So it could be for any particular work

11   setting that -- or sample that you chose that there

12   would be some inaccuracy there by analyzing the job,

13   and then having someone come out and analyze people

14   performing that. So -- but that's a viable

15   alternative, and that's been done before, and we

16   could certainly do that.

17   Another way where I thought Deborah was

18   kind of implying by some of her comments is you

19   could actually have experts not analyze the work,

20   but analyze the work descriptors and say that

21   someone at this -- Shanan was implying, you know,

22   we're not going to just ask do you make

 1 presentations or not; but once we find out we make

 2 presentations, as Dr. Andersson said, we need to

 3 know things like frequency, and duration, and

 4 intensity, and you know, you name it.

 5   So depending upon what the issue is, there

 6 might be several kinds of information that we would

 7 have so that an expert on the person side could

 8 evaluate these descriptors and say, well, people at

 9 this level on this work activity are operating at

10 this level on this physical activity, and this level

11 on this cognitive dimension. So that when we have

12 an entire description of work, along with expert

13 judgment on what that work would demand, we could

14 calculate person side characteristics and do exactly

15 what Dr. Anderson and Deborah were implying, that we

16 can make a prediction as to what the requirements

17 would be.

18   And again, just as I was implying earlier,

19 you know, press a button, give me every job that has

20 the same level -- give me every job that has this

21 same level of physical. You know, give me every

22 job -- you know, black out all the things that are

1 impairments. Can't do X, Y and Z; give me

2 everything that's left. Absolutely.

3   But again, how would you do that? What

4 would the specific methodologies be? The reason

5 we're kind of vague on this is because no one has

6 ever done this on the national scale before. And as

7 I said a number of times, I would advocate that, you

8 know, let's take an empirical approach to this.

9 David was saying, you know, look, there is three

10 ways of making inferences in mental areas and

11 cognitive areas; and here is how this particular

12 worked, and -- what was the foot one? The --

13   MS. LECHNER: Babinski.

14   DR. WILSON: Yeah, the Babinski. You

15 know, let's have a shoot out and figure out what

16 works best in this application. You know, that

17 would be the way I would try and resolve the

18 mechanics, but I think as far as the

19 conceptualization we can certainly provide the

20 advice of what we think we would do and how we would

21 get there and what approaches might need to be

22 examined.

 1   DR. BARROS-BAILEY: Gunnar, and then

 2   Sylvia.

 3   DR. ANDERSSON: Well, I think it all

 4   starts with the individual, doesn't it? And in a

 5   way the only information you have initially if you

 6   ignore the issue of the workplace is what the

 7   individual can and cannot do in terms of the

 8   limitations, and in terms of skills. And so by

 9   eliminating what they cannot do, you basically now

10   have narrowed the field dramatically and it makes it

11   much easier then to take the next step and figure

12   out what the skill set of the individual is and how

13   that would match with any of those remaining jobs.

14   And I would think that that from a search engine

15   point of view is actually fairly simple.

16   DR. WILSON: Right, but the important

17   thing here is now we have got two definitions of

18   skill going again. We have skill as a composite of

19   human attributes, and if I understand the

20   description that Tom was giving us earlier, we have

21   got skill as some composite of work characteristics.

22   So that's going to need to be resolved.

1   DR. ANDERSSON: Well, I don't think that

2   you can actually ever completely resolve that. And

3   I -- you will have some gray area for sure; and I

4   don't know that you can absolutely resolve that.

5   The question is how you make it as small as

6   possible, and how do you make it such that it is as

7   fair as possible to the individual in the process.

8   So maybe if you err, you would err on the side of

9   the individual, or you would err on the side of

10   the -- you know, that's a decision you would make at

11   some point.

12   MS. KARMAN: One of the things I -- since

13   I'm having a question about this, I am wondering if

14   this is something we need to make clear in our

15   recommendations -- I don't know, maybe this is a

16   taxonomic thing, maybe it is something that is a

17   part of TSA, so we would have to work with taxonomy

18   folks on it. I'm not sure, but I will put it out

19   there.

20   What I'm hearing is a distinction or our

21   need to be clear about when we're talking about the

22   search engine issue. Like how the user interacts

1   with the data we have collected -- or that Social

2   Security has collected versus taxonomically how we

3   want to be organizing the content model, developing

4   the content model, so that you go get the data that

5   you then can cluster or group in the way that Gunnar

6   and Debra talked about. So I just thought I would

7   put that out there because I'm hearing both and I'm

8   not clear on what we're all -- I just want to be

9   clear about it. I'm not clear about it.

10   DR. BARROS-BAILEY: I hear what you are

11   saying. One is more mechanical, the other is more

12   theoretical and logical. Tom.

13   MR. HARDY: Thank you. Thank you.

14   This is something that's been plaguing me

15   a bit. Either I'm two steps ahead or two steps

16   behind. I'm behind. I admit it. It seems to me --

17   and this is something I have sort of been floating

18   quietly about. We're almost at the point where I

19   think we need to sit down and say, okay, we have got

20   this conceptual thing hanging out here, this

21   platonic idea of the system and we gathering

22   information.

1   I would like to, again, suggest that we

2   all sit down and draw some sort of diagram -- and I

3   know it's kind of like a Star Trek, let's plan the

4   five levels. You know, you can't do it.

5   But I wondered, Shanan, when you are

6   speaking -- we are now at the point where we're

7   defining things. We're starting to say this piece

8   fits here, and I think this goes in this way. I

9   would love to see how you conceptualize gathering

10 the information required to do that presentation,

11 all those different pieces. How do you see them

12 funneling in? How do you define them? And where do

13 they go from there?

14   Because we started, I think, with this

15 1, 2, 3, 4, 5 measurement level; but now I think we

16 move on a little bit and start looking at how the

17 pieces fit. Because how that piece fits for you is

18 going to drive to a certain point how you gather the

19 data, how you define the data. How you build the

20 system to get that piece of information to fit into

21 that piece of whatever it is you are calling it,

22 which I'm not sure perfectly mirrors what Mark is

1   going to come up with; which I don't know if that's

2   going to mirror how I would view it based on what I

3   look at as voc person who has to gather this as a

4   lawyer, who has to take that piece and argue it, as

5   a person who then has to go to my client who is a

6   real live person and fit them in.

7   So I may -- I still can't get outside of

8   the DOT gathering, and I still carry around my

9   revised handbook for analyzing jobs. Well, that's

10   not the way we're going to do it, but I would love

11   to see something concrete from you, from you, from

12   each one of you that says this is how I would like

13   to see it start going, so that we can maybe start

14   coalescing around some models as well, which I do

15   believe in the end will drive how we gather

16   information, query the information, and then build

17   on the person side.

18   Again, I don't know if I'm ahead or

19   behind, but I would love to hear some thoughts about

20   that.

21   DR. BARROS-BAILEY: Shanan.

22   DR. GIBSON: I was going to say this kind

1   of builds on what Sylvia was saying; but it also

2   relates to what Tom was saying. I agree, because I

3   think I frequently find myself at least talking in

4   terms of the assumption that this software exist. I

5   find that we sometimes talk -- and sometimes may be

6   driven by the fact that the users we have spoken

7   with have given us wish lists, which are very

8   software driven specifics.

9   And that's probably not where we're at in

10   the process, and probably where -- at least from my

11   perspective, Social Security doesn't want us to go

12   right now. We're not developing the software and

13   how it's going to query. But what we put in the

14   model will certainly determine what they're able to

15   query.

16   So I think we do sometimes speak at this

17   level of a software that can ask these questions,

18   and drop down lists, and that's probably a

19   reflection of what our users have been telling us

20   they need. Some of us, myself for certain, speak in

21   terms of just the assumption that the software will

22   be there. It will pull these items that we need,

1   because, quite frankly, I'm certain they can be made

2   out there in other formats for other things. Like

3   Gunnar said, the software is really the easy part,

4   the search engine, the query. There is this model

5   that has to be developed.

6   I personally think we're kind of going at

7   it in a very good way. Although we started with the

8   five levels, as Mark keeps saying, it is a hand

9   crank down of integrals and intervals. And we

10 probably will never get any further down, I don't

11 believe, really than, perhaps, items -- subitems

12 that fall under the items we have here in our table

13 "A."

14   So for example, we have said -- shucks,

15 which was the one Mary just said -- the presentation

16 one, communication. Do you have to make

17 presentations to co-workers? Yes, there would be

18 some items which were follow-on items to that, which

19 allow you to get at the skill level, or the physical

20 demand, or the cognitive demands as associated with

21 that.

22   We have to constantly remember that even

1   then we're still creating the need for an

2   inferential leap. I think that's something that may

3   not have been clear early on. It can, perhaps, be

4   minimized in the case of someone making a

5   presentation -- it is a very small inherent

6   inference to make if someone makes verbal

7   presentations to others, they must be able to speak.

8   That was very straight forward. Some of the other

9   ones might be larger inferences to be made.

10   At least from my perspective within IOs,

11   the assessment of skills from work-related

12   information is always an inferential leap. It is

13   always either small or large, but to give you

14   another example in that same people dimensions

15   category we had negotiation, we would ask the three

16   questions. Are you responsible for procuring

17   resources from vendors? Are you responsible for

18   negotiating sales contract? Do you have to get two

19   or more people to agree on a course of action?

20   Those are just three random items we made up.

21   If someone said "yes" to three of those

22   items, we might conclude that this job requires

1   negotiating skill or skill at negotiating. So are

2   the behaviors present? If the behaviors are

3   present, are required in the job, the assumption is

4   that skill at that is present; but that is the leap

5   that we're saying requires negotiating skill; but I

6   think to go further in our reports we're going to

7   have to combine the three or four, depending on how

8   we divide them up, types of taxonomies.

9   I don't think at this time we really need

10 to be putting forth suggested items for all these,

11 though. We need to be putting forth the greater

12 level of taxonomic dimensions. I am afraid we get

13 bogged down with that framework.

14   DR. BARROS-BAILEY: Deb.

15   MS. LECHNER: And I think there is a

16 couple of approaches to data collection that we need

17 to consider as we think about this, though. There

18 is the data collection that Shanan is currently

19 talking about in terms of either interviewing job

20 incumbents or interviewing Social Security

21 applicants. But then in the physical area,

22 certainly, there is always the process of going out

1 and gathering -- through job analyst gathering

2 information about the physical activities that

3 occur; and that's a little different from some of

4 the cognitive and the other pieces. But I think we

5 have to keep in mind both of those methods of data

6 collection as we look at items.

7   DR. BARROS-BAILEY: Sometimes in the job

8 analysis you might be doing both.

9   MS. LECHNER: Right.

10   DR. BARROS-BAILEY: Mark.

11   DR. WILSON: Tom and I had lunch seems

12 like years ago -- when was that, yesterday?

13   MR. HARDY: Yes.

14   DR. WILSON: And we were discussing this,

15 and one issue we were talking about was, you know,

16 some sort of prototype report. How would these data

17 be presented? And I was thinking about that; and

18 again, that might be one of these issues that's sort

19 of beyond our charge in terms of we're not suppose

20 to be designing screens for people, and things of

21 that sort.

22   But as we were discussing this and trying

1   to approach this, I can see users out there saying,

2   oh, my God, you know, we're in the clutch of this

3   mad scientist who has this massive theory. We're

4   going to end up with a bunch of numbers and weird

5   chart. We're going to have to try and figure out.

6   But it very well may be the case that if

7   what -- people who are interested in when they look

8   at vocational information, which we had some of

9   these examples presented to us yesterday from

10   various commercial products, you know, if they like

11   these little paragraphs with a sequence of

12   descriptors in them, and all that's different is

13   that they're a few more links on that page that say

14   show all of the jobs or, you know, a little

15   checklist that removes certain things; and then they

16   click "show all other jobs," something like that;

17   what they actually see might not be that much

18   different than what they see now, but with much

19   greater functionality.

20   So you know, we can envision other kinds

21   of representations, but we can generate textual

22   reports that would look very much like what they're

1   using now if that's what they like; or you know, if

2   they would like some more graphics in there or

3   things of that sort. I was mentioning, you know,

4   there are two kind of ergonomist. There are kind of

5   the neck down ergonomist that look at body issues,

6   and things of that sort. But there are people that

7   look at what's the best way to represent information

8   to people that will reduce errors, increase

9   efficiency, you know; and I have been told that

10 Social Security Administration has some usability

11 people inside. This issue is more than just

12 usability; but they can, you know, design screens to

13 make it easier for people.

14   But it just dawned on me that, you know,

15 we can generate exactly the same type of report that

16 would look exactly like what a DOT report does. I

17 think for these people that are come before us who

18 are using this are very earnest, you know, please

19 don't take away the DOT, you know. We like it. We

20 have been using it. We're used to this approach to

21 work analysis. From their standpoint, you know,

22 there might be some tweaks to the terminology, but

1   it won't look that much different. It would just be

2   more powerful and more consistent.

3   DR. BARROS-BAILEY: Gunnar.

4   DR. ANDERSSON: That's the direction that

5   I would prefer in some ways. Of course, I think

6   it's more practical, and it's going to be easier to

7   implement; and I think it also allows you to

8   incorporate some of the things that currently are

9   going on in industry, such as functional capacity

10   evaluation, other kinds of things, which are very

11   much designed for that purpose.

12   I think in listening and -- the easiest

13   here actually is the physical demand. All you

14   really need is a checklist. Then you can go out,

15   and you can figure and you can describe any job

16   based on that checklist. You just decide what is it

17   you want to have on the checklist, posture, manual

18   material handling, and whatever else it is. Then

19   you just take care of it, and it would be extremely

20   easy to computerize.

21   And that would, to me, solve one big

22   issue, which is you have to be physically capable of

1   doing something before you consider any of these

2   other factors. If you are not physically capable of

3   lifting, then, all these lifting jobs just disappear

4   as an option. So you can narrow it so much by just

5   doing that.

6   MS. LECHNER: Also -- and the folks that

7   are on the legal end can help me with this -- but my

8   perception is that one of the biggest legal

9   challenges to the current system is the fact that

10 not all the jobs that are in here; and a lot of jobs

11 that are there don't exist anymore. And that's one

12 level of problem that can be solved so easily

13 regardless of what taxonomy we use. Even if we kept

14 the same exact taxonomy and we didn't do anything,

15 if we just -- if that piece were solved, would

16 80 percent of the legal problems go away?

17   MS. SHOR: Eighty percent, I don't know;

18 but a lot. I mean, really the fundamental problem

19 is that a lot of the jobs the titles are there, but

20 the description of the activities has evolved. Or

21 it's jobs that now exist and you can't find those.

22 You struggle to find something that's close, but

1   it's not going to be quite perfect. And then

2   occasionally -- and we never know whether this is

3   for humor value, but somebody will cite a job that

4   really no longer exists.

5   Then, the next that you back up against is

6   the significant number of jobs. So there is no

7   value to jobs that no longer exist, because you are

8   never going to be able to meet that criteria. Yes,

9   I think that's exactly right. I think you have a

10 world of people who find using the DOT something

11 that -- not only are they familiar with it, because

12 there is no point in keeping use of something just

13 because it's familiar; but it's familiar and

14 produces, when used correctly, pretty consistent

15 reliable results kind of things you are looking for.

16   So I would really be very interested in an

17 idea that is not going to radically differ from the

18 DOT approach, but definitely the world is aware of

19 the short comings of the current DOT.

20   MS. LECHNER: The other thing is that the

21 way the data is presented, and the descriptors that

22 are used is one piece; but you know how the

1 information is populated or provided. So that kind

2 of goes back to Mark's comments that it could be --

3 the data could be presented in a way that's very

4 similar to the way it's presented now possibly; but

5 it could be underpinned with a lot more empirical

6 information.

7   DR. BARROS-BAILEY: Sylvia.

8   MS. KARMAN: Yeah; I really appreciate

9 this discussion, because it's now occurring to me

10 that there are at least three things that I'm going

11 to want to, you know, think about in terms of what

12 the recommendations should probably cover. And one

13 thing I'm thinking is that we want to make clear in

14 the final report what our recommendations are with

15 regard to the more abstract, the more theoretical

16 recommendations.

17   You know, we're saying taxonomically the

18 model should contain these elements, needs to meet

19 these kinds of criteria, such as, you know, we would

20 want the Occupational Information System to be as --

21 the inference level -- I don't know what other word

22 to use for that. But the inference level should be

1   as low as we can possibly stand it. The level

2   should be as low as is practical for us to go and

3   get data, because that is one of the problems with

4   the DOT. Not only are there things that are

5   missing, or things that have not been updated, also

6   there is a fair amount of inference there that --

7   you know, anyway.

8   So it seems like we want to be able to

9   give our theoretical recommendations, and then,

10 where possible, without having to, you know, conjure

11 up, you know, things that may not be worth our while

12 to do or spend our time doing, but perhaps give the

13 reader an understanding of what that means, talk a

14 little bit about operationally what might that look

15 like. You know, you don't have to like draw the

16 whole picture, but you might want to -- you know,

17 depending on your subcommittee and how that might

18 work out for you guys, that might be something of a

19 way of making ourselves clear.

20   And then also talking about the

21 implications of the data collection, because that is

22 an issue, I think, that was in the content model --

1 what is a content model paper? You know. If the

2 Panel recommends getting these 20 items for

3 physical, and these five items for mental, or

4 whatever it is, what are the implications for us for

5 data collection? Deborah, you mentioned that.

6   And while that looks like that's further

7 down the road -- and it is further down the road in

8 terms of research and development -- when we are at

9 the stage now where we want to deal with what the

10 implications might be to the extent that we can. So

11 anyway, thank you.

12   DR. BARROS-BAILEY: Mark.

13   DR. WILSON: I think those are important

14 points, and at least on the work analysis side, you

15 know, in terms of -- I present it as a series of

16 decisions that have to be made in any job analysis,

17 you know, who is the source, what modality are you

18 going to collect it in, so on and so forth. So I

19 think we will as much as possible try and lay some

20 of that out. We definitely don't want to tie your

21 hands. We, at least, give you the choices there.

22   The other thing I want to make clear here

1   in terms of the DOT is that the approach we're

2   really advocating is not that much different than

3   various aspects of the DOT. It is just doing it

4   better and from a more scientifically defensible

5   taxonomic structure. But there are parts --

6   significant parts of the DOT that really are kind of

7   generalized work activity approach. It is just that

8   they have added on to that these other kinds of

9   things, which are problematic from two standpoints;

10   one, from a practical, how do you get this data?

11   It's costly, and it's expensive, and certain

12   modalities don't work. And you pretty much have to

13   go to incumbents or supervisors, because they're the

14   only ones that talk that way. So there is that

15   component.

16   Then, the other problem with that aspect

17   of the data is that it's not cross job comparable.

18   You know, a lot of oh, wouldn't it be neat if, and

19   how do we get to that. You have to have the same

20   metric for everyone. You have to have the same

21   underlying profile which allows the computer to do

22   all this work, and avoids this -- you know, God love

1 them, but, you know, they are -- either on a

2 computer or some piece of paper they are like got

3 their finger on okay, there is that adjective in

4 this description. Okay, there it is there. Oh,

5 that's a transferable skill, I guess.

6   That doesn't mean that we don't give that

7 decision maker some parameters that maybe they can

8 adjust and say well, within "X" amount of variants,

9 what jobs are similar to this? Removing Gunnar's

10 description that, you know, they can't sit anymore,

11 or whatever it is, what's left.

12   So I think it's important, and maybe we

13 erred a little here. We don't want to scare them to

14 think that whatever we came up with is going to be

15 remarkably different than what they are used to.

16 It's just going to work better, be more up-to-date,

17 and have capabilities to assist them that they don't

18 have right now.

19   DR. BARROS-BAILEY: I see Tom smiling at

20 the end of the table. Did you have a comment as

21 well? Okay.

22   MR. HARDY: Don't scare us. We're all

1   scared. Don't scare us anymore.

2   DR. WILSON: Well, you know, every once in

3   a while, you have to play the role of the evil

4   scientist.

5   MR. HARDY: I was going to say, on this

6   Panel I am not a scientist. Just pointing that out.

7   DR. WILSON: Is that a good thing or bad

8   thing?

9   MR. HARDY: Well, mad scientist.

10   In my travels, and in my talks, one of the

11   things I hear over and over again is that there is a

12   fear and there is a worry and there is a concern

13   from all the users. And again, the end users being

14   not just -- and I know our charge is Social

15   Security, and DDS, ODAR, ALJ; but there are many,

16   many, many other users out there. We have to keep

17   in mind we have -- I always go back to the DOT

18   started out as one thing, and look what it became.

19   We need to keep in mind we're doing OIS

20   right now. What will it become? And who will be

21   the end user, even though we're not designing for

22   them. We do have to keep in the back of our mind

1 there are other people out there who will be using

2 this for other things. That's a given. And even

3 excluding those people from this conversation,

4 coming back to the end user that we have now, I

5 think there is a real fear as to what's going to

6 come out of this. And the closest we can stay to

7 some sort of modeling that is familiar, and albeit

8 outdated, it has worked. The DOT has worked in many

9 ways. Many of the definitions are good. And the

10 information that comes out of it is useful. It is

11 something that -- we're sitting here talking about

12 it at this point because it does something.

13   And as long as -- I smile because I would

14 love to see something coming out that's not scary,

15 that is familiar to me as an end user, is familiar

16 to people out there as an end user, and does look

17 something like the DOT. I think -- talking on a

18 gigantically broad theoretical level, are we talking

19 about -- I always hear people say, are you updating

20 the DOT, or are you changing the DOT? Are you

21 making something new?

22   I think the closest we can stay to

1   something that looks like the DOT, the better we're

2   going to be in the end. That's why I made the

3   comments "I'm not a scientist."

4   DR. ANDERSSON: How about improved?

5   MR. HARDY: There you go.

6   DR. BARROS-BAILEY: Okay. We're almost at

7   10:30. I am wondering if we're at a point where we

8   need to go ahead and take a half hour break so

9   people can check-out. Then we can come back and

10   continue the deliberation and the rest of our

11   meeting. So why don't we take a half hour break and

12   come back at about five to the hour.

13   (Whereupon, a recess was taken.)

14   DR. BARROS-BAILEY: Okay. We're heading

15   to the home stretch here. The last hour. I thought

16   that the discussion earlier today was incredibly

17   productive and very necessary. It was a great

18   discussion.

19   I want to put it out there in terms of we

20   had taken it from all the subcommittee reports of

21   everything we had done. We were starting to kind of

22   bring it all together, I felt, in terms of the way

1 we wanted it to look when we delivered it in

2 September.

3   We had a request from the executive

4 subcommittee at the first meeting in terms of some

5 guidance for subcommittee reports that, then, we

6 combine into the general report. Just wanted to let

7 you know that a template is being worked on that

8 will be brought to the executive subcommittee on

9 the -- the executive subcommittee meeting on the

10 18th that Sylvia is going to run, because I will not

11 be available.

12   We will try to integrate into that

13 template some of the recommendations that came out

14 of the discussion earlier today. If there are other

15 elements that people would see necessary to include

16 in there besides the ones that were outlined in the

17 timeline that we discussed yesterday, including an

18 evaluation component, and all of the support

19 documents, that would be great to have some

20 discussion about.

21   I will just open that up to the floor in

22 terms of any thoughts anybody might have along those

1 lines. Sylvia.

2   MS. KARMAN: Yes, I am an English major,

3 so I am going to have some thoughts about that.

4   Actually, I sent a message to Mary and

5 Debra about it, but since you're talking about it, I

6 will mention it to everyone and get your feedback on

7 it. One of the things, in addition to the pieces

8 that I mentioned earlier in our earlier discussion.

9 Also, it occurs to me that especially for areas that

10 the taxonomy -- I'm sorry, the TSA subcommittee,

11 things that we are working on, as an example, we may

12 want to clarify and acknowledge when we -- you know,

13 what the definition is for -- in the Regulations for

14 certain elements where we, the Panel, need to make

15 recommendations about content model issues affecting

16 things like skills, things like physical demands or

17 the physical worker traits or the mental cognitive

18 worker traits that we are clear about the fact that

19 we acknowledge what the SSA definition is in a

20 regulatory sense, you know, footnote that or

21 whatever. I don't care about the method. But that

22 we're acknowledging that so that it's clear to the

1   reader when we are making -- when we're defining

2   terms or defining something in our descriptions

3   that -- that we're not redefining something that's

4   in the Regs.

5   DR. BARROS-BAILEY: That our

6   recommendations are within the context of the

7   definition in the Regs.

8   MS. KARMAN: Right. I mean, that enables

9   SSA to then take that and go forward with it at some

10   other point, but that we're understanding that we're

11   working within that context. Not that we are saying

12   things have to stay the same, but that's just not

13   what we're working on.

14   DR. BARROS-BAILEY: And we have a couple

15   of teleconferences coming up, one on July 14th, and

16   the one either on July 31st or July 20 (sic) that

17   we're going to work out.

18   One of the ideas that came out in the last

19   24 hours is that different subcommittees are at

20   different levels in terms of development of

21   recommendations. Sounds like taxonomy and

22   classification might be pretty close to getting

1 theirs completed as opposed to some of the others.

2   So me might want to kind of chunk the

3 recommendations and the voting on those

4 recommendations, so that we are not voting on all of

5 them at this August date. We might be able to vote

6 on one or two in July, and then the remaining in

7 August. So that's an idea that I will let Mark

8 speak to, because it looks like he wants to say

9 something.

10   DR. WILSON: Did you just up my deadline

11 relative to my subcommittee, is that what I'm

12 hearing?

13   DR. BARROS-BAILEY: I think you up'd it

14 yesterday. I'm just affirming it.

15   DR. WILSON: My view on this is that I

16 suspect we will get that done sooner, and we will

17 try and move as quickly as possible to develop sort

18 of a prototype report; and you know, maybe if that

19 gets vetted first and that helps the other

20 committees in terms of structure and things of that

21 sort, great.

22   DR. BARROS-BAILEY: I didn't want to put

1   you on the spot. That was just an idea.

2   DR. WILSON: I am on the spot. I am

3   taking note of the fact that my deadline has been

4   moved. So at some other point, I'm going to ask for

5   consideration.

6   DR. BARROS-BAILEY: Thank you.

7   MS. LECHNER: I will try and help take you

8   off the spot. I kind of think that we would be

9   better served and waited and looked at all the

10 pieces at once. I know not necessarily from a

11 workload standpoint, but from a standpoint of how

12 these pieces fit together. So I would hate to vote

13 on one piece, and then go read someone else's and

14 say well, if we do it that way, it's different from

15 that way. So I don't know, I just think we would be

16 better served if our recommendations would be more

17 consistent if we looked at all the pieces.

18   DR. WILSON: I think maybe one solution to

19 that in terms of efficiency is we want to vote -- if

20 the work taxonomy thing gets done first, and we look

21 at it and vote on it, I don't think by any means

22 that we would preclude that if issues came up in

1 subsequent reports that we couldn't readdress that.

2   MS. KARMAN: Right.

3   DR. BARROS-BAILEY: Nancy.

4   MS. SHOR: Well, perhaps one way to do it

5 is, if you are finished first to circulate it, and

6 then maybe vote as a block. But I would find it

7 real useful to see the pieces as soon as they're

8 done. So maybe hold off voting on them, but it

9 would be great to see them as promptly as we're

10 done, instead of seeing the entire thing at one

11 time. That would be really helpful.

12   MS. LECHNER: That would be a good

13 compromise.

14   DR. BARROS-BAILEY: Okay. So it sounds

15 like we are moving toward completion in September,

16 and we have got a work plan in place. We will take

17 a look at that a little bit more. I will let the

18 executive subcommittee deal with that on the 18th in

19 terms of the way it works out the best.

20   Are there any other thoughts? Any other

21 deliberation?

22   Was there something, Tom, that you needed

1   to reign in? Okay.

2   Anything else that we need to discuss at

3   this point in time as we move into three months of

4   our meeting?

5   MS. KARMAN: Well, actually, we are going

6   to be meeting by phone.

7   DR. BARROS-BAILEY: Right. I was just

8   thinking face-to-face.

9   MS. KARMAN: Yes. I know. I just

10   thought that maybe I -- I was thinking about whether

11   or not the audience is aware of the fact that -- I

12   know we have been over it. I don't know to what

13   extent who has heard what -- that we are planning on

14   having two meetings between now and the face-to-face

15   in September. We're still looking for a location

16   for that meeting, still trying to work that out;

17   which we hope to have that worked out really soon.

18   DR. BARROS-BAILEY: Yes, sorry about that.

19   We process so much more when we meet face

20   to face. I wanted to make sure that if we have

21   anything that we need to address, the communication

22   that we had this morning was so productive that we

1 address it now. Tom.

2   MR. HARDY: I am just thinking out loud.

3 There is going to be one -- probably about four or

4 five of us meeting in Falls Church together at some

5 point. Would it be beneficial to break out at some

6 point and do that group, and get the rest on the

7 telephone if necessary to do an update, because some

8 of us will be together? That would be a FACA issue,

9 though, wouldn't it?

10   MS. TIDWELL-PETERS: Yes.

11   MS. KARMAN: Yes. I mean, if you have --

12 if your subcommittee is largely represented, yeah.

13 The TSA group, for example, has issues that they

14 want to go over, sure, you know, why not.

15   MR. HARDY: I just bring that up that

16 there will be a group together at an undetermined

17 time; but there will be a group of us together at

18 some point between now and later. It's not an

19 official meeting, because it's fact finding.

20   MS. KARMAN: Right.

21   MR. HARDY: If necessary, you would have

22 some people together we could maybe.

1   MS. KARMAN: Yeah. I mean, like I said,

2   it's topic specific. Yes.

3   MR. HARDY: Okay. Just wanted to bring

4   that up.

5   The other request I have is I find when we

6   come to these things and I get my binder I am trying

7   to catch up. I would be very grateful for any

8   materials that they could get to me sooner so I can

9   read and be prepared.

10   I like the idea of circulating documents

11   and getting them out and around. And before the

12   September meeting anything I can have prior would be

13   helpful. I see other heads shaking "yes" on that

14   too.

15   DR. BARROS-BAILEY: Shanan.

16   DR. GIBSON: I was going to say that I

17   thought it was very helpful this last time when

18   Debra Tidwell-Peters sent us an e-mail with 14 or 15

19   attachments there. That certainly facilitated it

20   for me. So I concur. I think that was great.

21   DR. ANDERSSON: I was going to say, I got

22   it all by e-mail before I came here.

1   DR. BARROS-BAILEY: Most of it came by

2   e-mail. Mark.

3   DR. WILSON: I just wanted to note that it

4   struck me, I kind of had forgotten about the Falls

5   Church stuff. We're going to have to document that

6   in our report too. That may be something, depending

7   on the timing there. We will try to get as much

8   possible ready. We would have to include that as

9   well.

10   DR. BARROS-BAILEY: Absolutely. Anything

11   we do from roundtables to DDS visits, all of that is

12   part of the methodology in coming up with our

13   recommendations that we need to document.

14   Anything else anybody else wants to bring

15   up?

16   DR. SCHRETLEN: Yes, I do.

17   DR. BARROS-BAILEY: Go ahead, David.

18   DR. SCHRETLEN: I have sort of a big

19   picture issue, long range issue. Since we have the

20   time, I thought I would bring it up. I have just

21   been mulling over something.

22   The very first meeting, the inaugural

1 meeting, we were presented with the shortcomings of

2 the DOT, and how big a task it would be to revise

3 the DOT, because it has over 12,000 occupations.

4 Somewhere vetted in those early presentations was a

5 suggestion that what SSA is thinking about is

6 something that's kind of like the DOT, but not quite

7 as big.

8   They were saying -- I remember a number

9 floated around like 6,000 jobs or something like

10 that. And just bear with me for a minute. I asked

11 at the first meeting how many jobs in America are

12 represented by the 100 most common occupations? And

13 someone from SSA compiled such a list, and it's not

14 perfect, because some of those titles probably

15 subsume multiple jobs.

16   But on the other hand the sort of

17 take-home message was that the 100 most common

18 occupations actually represented, when we looked at

19 it, about 65 percent of all jobs in the United

20 States of America, roughly 100 occupations. So it

21 occurred to me as I thought about it more, that why

22 would we create a system that identifies even one

1 job that is not significantly represented in the

2 national community? What purpose would there be for

3 specifying the characteristics of a job -- any job,

4 even one, that is not represented in significant

5 numbers in the national economy?

6   And especially if -- if the top 100 jobs,

7 occupations represent roughly 65 percent of all jobs

8 in America. It might be that the top 1,000 jobs

9 would represent 95 percent of all jobs in America.

10 And in fact, if we had a software system, as Mark

11 suggested, that ultimately while the sort of

12 internal structure of the software system is

13 informed by the work we're doing, but the interface

14 looks very much like an existing sort of system that

15 is familiar with end users, why couldn't the jobs

16 that are nominated that are identified for a

17 particular applicant only be jobs that are

18 represented in the national community, so that there

19 is no argument about, well, is this job actually

20 existing or is it existing in a significant number?

21   Because it might be that the top 1,000 or

22 1500 jobs, not 6,000 would actually subsume

1   95 percent of all jobs in the country.

2   DR. WILSON: Excellent point. The one

3   conceptual shift you made there, David, which is

4   important, is from occupations to job. You start

5   off talking about occupations. That 100 was

6   occupations, and that's SOC data. If you remember

7   some of the other presentations we had big within

8   category variation; but I like the way you are

9   going. You know, I like the thinking.

10   The issue is that who knows what that

11 number is? And I think the strategy that seems to

12 have evolved kind of has three prongs to it. The

13 first is well, what are the jobs in significant

14 numbers that SSA sees now that people say I can't

15 do, I'm disabled? What's that?

16   And then the second prong is well, what

17 are the jobs that SSA currently recommends? Well,

18 you know, we can't do that, but we think you can do

19 this. Whatever number that is, the top 100 or

20 whatever. And then it would be interesting to

21 compare that list of however many those two are to

22 the list that you are talking about. And what

1 percentage do we get up to in terms of the national

2 economy, that top 100 based on the SOC. The -- and

3 the two that are most relevant to what SSA is doing.

4   But I think because of the way the

5 Department of Labor has chosen to think about and

6 talk about work is very different than the way we

7 are, and so it's a bit of an unknown in terms of

8 exactly how many are out there; but what I heard

9 when you were speaking is, you know, let's be

10 efficient about this. Let's identify and find some

11 means to only look at work that exist in significant

12 numbers. We shouldn't be going out on a spy hunt

13 looking for non-existing work. I couldn't agree

14 more.

15   DR. SCHRETLEN: And I do appreciate that.

16 I was sort of going back and forth between job and

17 occupation. If you look at those 100 items, several

18 of those were jobs, many of them. And in fact, you

19 know, we don't know the exact numbers. But if we

20 were to capture over 90 percent of jobs in America

21 with a list of 1,000, or 1500, or 750, it would be a

22 much smaller task to assess the characteristics of

1   those specific jobs. And it might be that

2   five percent of people employed in the United States

3   are dispersed among jobs that only nine or 27 people

4   actually do.

5   But I bet you it's fairly -- I bet you

6   when you get down to the level of jobs that are just

7   not significantly representative in the national

8   economy, you are getting down to the part of the --

9   a fraction of the work force that is pretty small.

10   DR. BARROS-BAILEY: Tom, and then Gunnar.

11   MR. HARDY: You raise an excellent point.

12   That's a great question. I stand back and get a

13   little -- we're always playing in theory there, I

14   guess. And for those of you who have been involved

15   in this for a long time, you can go back to the IOTF

16   and all those things that we did five, ten years

17   ago. You are raising a question that I raised ten

18   years ago, which is, you have got to define a couple

19   of these meta, meta, meta categories, which is, what

20   is an occupation? We need to define what an

21   occupation is. That's going to drive you somewhat

22   into how you are going to gather. You have to

1 remember that, again, this is something that is

2 somewhat defined for us already.

3   We are walking a tight rope between ending

4 up as an O*Net, which is too broad and brings things

5 down to too small of an aggregation. Whereas, maybe

6 the DOT needs to be tightened in aggregation. There

7 isn't an answer. I think Mark is right. We don't

8 know the answer of how many there are until we start

9 populating those definitions and those data

10 gathering subsets. And the other piece that we have

11 to keep in mind is that there is significant numbers

12 in the national economy. That is something that we

13 have to work within.

14   What is that? That's going to be a driver

15 for us when we're looking at defining an occupation.

16 So I don't know that we can answer some of that.

17 You know, I think we had spoken earlier about trying

18 to be as efficient as possible in gathering

19 information and trying to hit the big -- somebody

20 called it little hanging fruit or something. Get

21 the big ones, and get them moving and get them

22 going.

1   As far as how many are out there, I think

2   Mark is right, we're not going to know until we do

3   some of the work; but also work within the

4   definitions of what is significant numbers, and what

5   is an occupation? And that gets me back, again, to

6   the taxonomy of what's a job? What's an occupation?

7   At what levels -- where are we drawing those lines?

8   Those lines haven't been drawn yet. They

9   have to some extent for us; but in the work we are

10   doing, I am not sure they have drawn enough for us

11   to draw a conclusion.

12   DR. BARROS-BAILEY: Gunnar, did you have

13   something?

14   DR. ANDERSSON: This goes back to the

15   presentation we had on Tuesday, and it really

16   depends on whether you are a lumper or a splitter.

17   You could take the health care worker and it would

18   encompass about 20 percent of the population in this

19   country. But you would probably say from the very

20   beginning that that's not a very good way of

21   describing a healthcare worker.

22   I know where you are going, but at the

1 same time it doesn't make any difference for our

2 model. Our model needs to be the same irrespective

3 of how many subdivisions you have.

4   DR. SCHRETLEN: I wasn't speaking to the

5 issue of the model, the structure of taxonomy.

6   DR. ANDERSSON: I understand.

7   DR. SCHRETLEN: But I disagree. I don't

8 think you do understand what I am saying. In fact,

9 I'm not talking about occupations. I misspoke. I

10 mean jobs. Specific jobs. I bet you that if we

11 identified somewhere between 750 and 1500 specific

12 jobs, that those would represent a huge proportion

13 of the jobs in our work force; and I don't mean

14 occupations.

15   DR. BARROS-BAILEY: And I think that might

16 be a good starting point. But if we think about --

17 we are at one point in time right now in a moving

18 stream. And so if you think about how much the DOT

19 has changed, and that it was only cross sections

20 when it was updated, hopefully, we won't have cross

21 sections. Hopefully we will have something more

22 organic than that. We can't build something and

1   assume that the cut we have right now is the only

2   cut we're going to have when this things is in

3   operation in three years. So it might be a good

4   start, but I don't know if it's the only place we

5   want to look.

6   DR. SCHRETLEN: Things are going to change

7   whether you define 6,000, or 10,000 or 1500. That

8   issue is going to be an issue no matter how you

9   slice the pie.

10   DR. BARROS-BAILEY: Correct. I think in

11 terms of the number -- so if we are looking at the

12 number, is it 812, or is it 12,741, or is it

13 somewhere in between? I think it -- we won't know

14 until we start looking at the data that we're

15 gathering and we still -- start making decisions

16 about that data where the numbers are going to fall.

17   DR. ANDERSSON: What data?

18   DR. BARROS-BAILEY: Collecting data about

19 jobs.

20   DR. ANDERSSON: Yeah, but what data are

21 you going to use to describe that? Because that all

22 depends on whether you split or not.

          1   DR. BARROS-BAILEY: It's the data that we

          2   have been talking about in terms of what the

          3   parameters that we're looking at in terms of the

          4   taxonomy, that type of thing.

          5   DR. ANDERSSON: But how are you going to

          6   apply that? You have me lost here. I don't

          7   understand it.

          8   DR. BARROS-BAILEY: What do you mean by

          9   application?

         10   DR. ANDERSSON: I don't understand it. I

         11   guess it's because I don't quite understand where

         12   David is going either. I can understand the idea of

         13   making the tables smaller or larger, going from

         14   12,000 to 6,000. But the way you would have to do

         15   that is you would have to somehow figure out a way

         16   of including the remaining into those 6,000. So in

         17   the end it doesn't help me much. And I think it's

         18   particularly not that necessary today, because we

         19   now have a very different way of sifting through

         20   12,000 than we had 50 years ago. So I can, using my

         21   computer, go through an enormous number of different

         22   jobs in seconds just by defining some of the

1 parameters.

2   DR. SCHRETLEN: But you can't define the

3 parameters in seconds. It's going to take -- you

4 know, if you want to define job demands at the level

5 of a DOT analysis for 6, or 8, or 12,000 jobs, it's

6 a lot bigger problem than doing it for 1500.

7   DR. ANDERSSON: Think about how many jobs

8 it will create, and how good it will be for the

9 economy. I don't see this as an issue. I really

10 don't.

11   DR. WILSON: Full employment act for

12 occupational analyst.

13   Well, there is two issues going on here.

14 I don't really think there is disagreement. I think

15 the issue is one, where do we start this process;

16 and we don't want to get too much into a discussion

17 as we've talked about before.

18   The notion of what a job is, is kind of an

19 abstract construct. Not everyone would agree, and

20 what DOLs -- what -- at what -- as you were saying

21 earlier, healthcare worker, would -- that one,

22 quote, job title would capture a huge part of the

1   economy if you referred to it by that name; but that

2   could be broken down.

3   So -- but I do think it's important in

4   terms of efficiency and getting what I heard David

5   saying, which I think is an important valid point is

6   that we need to focus on those jobs that we know

7   exist, and that exist in large numbers, and that SSA

8   deals with on an every day basis; and that might not

9   be that many. But I -- and are we going to describe

10 them in the same level of detail as the DOT? No.

11 You know, we're not going to do the task analysis

12 for every job in the economy.

13   If there turns out there are going to be a

14 150, and that's all we're going to do, could we do a

15 task analysis for 150? You betcha, we could do

16 that. And it would generate a lot of jobs, because

17 that's very time consuming. Then you get into the

18 issue of shelf life. Tasks change a lot more

19 quickly than generalized work activities do. So

20 that issue has to be addressed.

21   But I think it's an important point that

22 where we start, the sampling strategies that we use

1 are such that it might not be that big and daunting

2 a task to create a tool that was up-to-date and

3 could be revised on a consistent basis for some

4 subset of jobs that we capture a huge part of the

5 working population, not all of it.

6   As I understand -- and this is the real

7 difficult task that Social Security has, they have

8 to be able to talk in terms of all work that exist

9 in any significant numbers; and that's the issue

10 that we don't know with our, as yet, hypothetical

11 measurement instrument how many types of work exist

12 out there the way we describe them. You know, there

13 may be some surprises there, I don't know. But I'm

14 starting to think that the number of titles might

15 not be as many as -- as what you would find in the

16 DOT. That there might be -- that even if you had a

17 numerical ability to analyze and examine the DOT

18 data so that they were comparable, but you can't

19 because of the task.

20   If you remember Dr. Harvey's stuff, if we

21 could analyze them in terms of -- this work in terms

22 of where they fall on that ten dimensional solution,

1 you might find there really aren't 12,000 anyway.

2 There are whatever number there are. You analyze

3 them more precisely. So I think in terms of

4 sampling and efficiency and strategy and targeting,

5 it's an important point that there might not be

6 that.

7   We might get very far and get a lot done

8 looking at relatively few job titles, especially

9 once we have this common metric, because now we can

10 directly compare things, and say, you are calling a

11 hoop splitter over here and you are calling a hoop

12 whacker here, and those turn out to be exactly the

13 same thing. It's just a regional difference in

14 terms of some sort of tradition in different parts

15 of the country.

16   That's, I think, one of the real values of

17 using a common metric approach is that for the first

18 time the DOT could never do this, O*Net for a number

19 of reasons didn't do this. We will be able to

20 answer this question. How many unique job titles

21 are out there? How many unique sets of skill sets

22 for people? But right now, absent the data, it

1   really is a difficult task to estimate that from

2   Department of Labor information.

3   DR. BARROS-BAILEY: Gunnar.

4   DR. ANDERSSON: I finally am beginning to

5   understand where David is going with this. I think

6   that -- first of all, when you -- and when we have

7   our model ready, somehow we have to, I think, advise

8   the Social Security Administration or the Department

9   of Labor or whoever is going to do this where they

10 should start. And obviously, it makes sense to try

11 to figure that out based on how many people are

12 involved in all these different jobs.

13   So from that perspective, it makes a lot

14 of sense. The other thing that's going to happen is

15 that once you have these jobs classified -- and I'm

16 not sure whether it's by skills or whatever

17 classification would be the most important in this

18 respect, you will find that you can lump a number of

19 them under some common heading; and now you can get

20 down from the 12,000 to 6,000 or whatever number is

21 the right number, which I guess is an arbitrary

22 number anyway, but . . .

1   DR. BARROS-BAILEY: Sylvia.

2   MS. KARMAN: I think -- first of all, I

3   don't think this is that far out in front of where

4   we are in the sense that we do need to come up with

5   recommendations for classification. We will present

6   it, you know, for a fact finding. We have provided

7   our presentation, the other data that RJ did on how

8   we may go about doing an initial classification.

9   You know, if we're choosing elements that are

10   critical to SSA, then, that becomes a piece of our

11   taxonomy as well.

12   You know, we can initially begin by trying

13   to see how those things group. See how occupations

14   group along the lines of these types of elements,

15   and that gives us an initial idea so that we can

16   identify them and get out there and find them.

17   Of course being guided by some of the

18   things that you are suggesting, you know, things

19   that are most likely to occur in our -- you know,

20   among our disability population in the first place.

21   So that's one thing. So I think this is

22   somewhat relevant. Then the other thing is that the

 1   6,000 or whatever the number was we came up with,

 2   actually, the reason that was in that presentation

 3   at the inaugural meeting was because we had selected

 4   a number to provide context for our initial plans,

 5   so that when we presented them to our management we

 6   had a way of tying that to what this might imply.

 7   You know, what might be -- resource implications be

 8   for Social Security, whatever.

 9   So we said, you know, we can't -- we don't

10   really know how many jobs there is going to be --

11   how many occupations, you know. But let's say for

12   the sake of the argument that it's half of whatever

13   we think we need, you know, to have now. This is

14   what it would look like. So if it's more, then we

15   know where that will go. If it's less, then we know

16   what that would be.

17   Ultimately, like everybody said here so

18   far, we really don't know until we begin collecting

19   data; but from what I'm hearing I think it's correct

20   that taxonomy is going to drive how we define that

21   occupation. And then that, in turn, you know, with

22   the initial classification that we're doing, will

1 help us determine what jobs we want to identify.

2 And then as we begin collecting real data, we can

3 see where that takes us. You know, how many jobs

4 are we really talking about?

5   So the other thing is, the third thing is

6 that then this ties together a bit with what we

7 talked about earlier with this discussion, I think,

8 is we are right now comparing a paper on the DOT --

9 our concerns with O*Net -- you guys already have

10 that paper -- our concerns with DOT, and Social

11 Security's concerns about -- well, not even

12 concerns, but what we might want to take from both

13 DOT and O*Net to move forward. You know, what

14 elements are there? What things should we consider?

15 It is kind of like lessons learned, you know.

16   And so that paper is -- is still under,

17 you know, in process. And as soon as we're done

18 with that, we're going to be presenting that to the

19 Panel this summer or in the fall. And I think that

20 is another piece of this that we haven't really had

21 an opportunity as a Panel to talk about. So --

22   DR. BARROS-BAILEY: I think that will be

1 helpful. Just for a little bit of history in terms

2 of numbers. When we looked at this years and years

3 and years ago, we knew that 812 at that time, or

4 about 1,000 was too small. We knew that 12,741 was

5 a little too big. So we know -- we knew that the

6 Australians had 2500. We felt that was too small.

7 VDOT had 8500. They thought that was okay. We

8 don't know. So we knew it was somewhere within that

9 broad range.

10   DR. SCHRETLEN: So 812 was too small for

11 what? You are saying it is too high a level of

12 aggregation. I am not talking about lumping versus

13 splitting. That's not what I'm talking about. What

14 I am talking about is sampling specific jobs in

15 America. I'm not saying that we need a system that

16 covers 100 percent of jobs in America. It might be

17 that if you cover 90 or 95 percent of them, you, you

18 know, have more than enough options for every single

19 applicant who ever walks through a door of DDS.

20   DR. BARROS-BAILEY: Sylvia.

21   MS. KARMAN: I think -- you know what, if

22 that turns out to be the case, that's fantastic. I

1   think the only -- the measure that I can understand

2   is well -- well, they're two. One is the extent of

3   variability within that job occupation, widget,

4   whatever you want to call it. If their hallmark is

5   as much as you can get homogenous along the elements

6   that we care about, if there is five of them, I'm

7   happy.

8   Okay. I don't know that that would be the

9   case, but that's one of my rules of thumb for that.

10   You know it is based on what I'm understanding

11   are -- you know, the world of occupational

12   information to be; and so I'm going to look to our

13   Panel members with expertise in that area to help me

14   out with that. That's what I'm understanding.

15   The other thing is, when we do our work,

16   you know, while we get 3 million cases a year, we're

17   looking at each of those cases one at a time. So

18   when you take one person and look at their one --

19   their set of limitations, that's why that

20   homogeneity around the elements we care about is so

21   important. I know you understand that. So I'm --

22   I'm wondering if I'm not understanding what you are

1   saying.

2   DR. SCHRETLEN: I really and truly do. I

3   think that nothing that I'm saying should be

4   construed that we should do anything other than

5   achieve a level of homogeneity and job descriptions

6   that is absolutely optimal.

7   Once we have done that, we can identify,

8   we can include in some listing or some software that

9   adjudicators reference only those jobs that are

10 represented in significant numbers in the national

11 economy. Why include jobs that are not represented?

12 No matter -- even if they were perfectly well

13 defined in terms of task, homogeneity, why include

14 them? Why not only suggest to applicants jobs that

15 are available?

16   MS. KARMAN: I think we will want to be

17 sure we focus on things that are significantly --

18 that are represented in significance numbers. Then

19 the question becomes, what is that? And I'm not

20 sure we're -- I just don't know how we're going to

21 get at that. So I don't know. Anyway.

22   DR. BARROS-BAILEY: Deb.

 1   MS. LECHNER: I have a question that's on

 2   a slightly different topic, kind of going back to

 3   something that Mark said earlier.

 4   I hear Mark saying that we're not going to

 5   do task analysis. I hear Sylvia saying when we go

 6   out and collect data -- maybe I don't understand

 7   what you mean, Mark, by we're not going to do task

 8   analysis. Or is that -- is that conflicting with

 9   what Sylvia is saying, or are you all both saying

10   the same thing?

11   DR. WILSON: No. We're saying the same

12   thing. It goes back to the -- when I was having my

13   senior moment, and Mary was asking me about, is this

14   a two or one, that sort of thing.

15   When I say we're not going to do task

16   analysis, we're not going to be down at the one

17   level identifying highly job specific information.

18   Where one might conclude if all one had

19   were level one information that there are 12,000 or

20   whatever the number is, unique jobs out there

21   because of minor variation, wording, and whatever,

22   when, in fact, there might be 100, there might be

 1   850. When you move up to level two, you still

 2   describe work in ways that the incumbent would

 3   recognize the descriptors, but those descriptors

 4   would be common across all work.

 5   So that for the first time -- no one has

 6   ever done this before. No one knows the answer to

 7   David's question of what exist in significant

 8   numbers, which we have created from a common

 9   descriptor set that allows us to identify titles

10   based on little within title variability. So we

11   don't know. We will get there. We are not going to

12   have the minor detail that's in the DOT, but I think

13   we will have more than enough detail to be useful.

14   And to some extent, other countries, prior

15   examinations of this issue are all either based on

16   sort of DOT standpoint and thinking about the world

17   of work from that standpoint, or, you know, God love

18   them, the economist look at work from a very

19   different standpoint; and they're in Gunnar's

20   terminology big time lumpers. And I think we're all

21   in agreement that the level of lumping in the SOC

22   and in O*Net, given the examples of what kinds of

1   titles ends up, is not useful for our purposes.

2   So -- but none of that refutes David's

3   point that there could be several SOC categories

4   that nobody is in, or at least not in any number

5   that would be useful to us, so why populate that

6   data? And I agree, we probably shouldn't populate

7   that data.

8   We should we be able to analyze that kind

9   of work. If at some future point numbers start

10   increasing, you know, absolutely; but where we focus

11   our efforts, we focus where the work is and figure

12   out what's there, and the numbers -- whatever the

13   number is.

14   DR. BARROS-BAILEY: Bob.

15   DR. FRASER: I'm really interested in the

16   applicant job prong, because being a VE for 25

17   years, for example, I don't think the number of

18   white collar professionals that I saw even in double

19   figures, you know -- I mean, I never had an

20   accountant, never had a stockbroker. I can go on,

21   and on, and on. I had maybe one or two nurses.

22   That's something to look at. Take this way down.

1   Those people somehow cope, don't leave those jobs.

2   DR. ANDERSSON: That assumes that our

3   system would only apply to the Social Security

4   Administration. Because if you start looking at

5   other disability -- you know, private disability

6   insurance and so on, then those numbers start rising

7   very rapidly; and in fact, if you look at UNOM and

8   some of the others, you find more white collar

9   workers than you find blue collar workers. It

10 depends on how limited you want to be in terms of

11 what you do.

12   DR. FRASER: You have a point, but that

13 may not be our task, you know, to provide that basis

14 for other systems.

15   DR. BARROS-BAILEY: Tom. I thought you

16 wanted to say something.

17   MR. HARDY: I have to go with -- follow-up

18 with Gunnar coming from private disability. There

19 is -- we have talked about this in the past -- there

20 is very much a sku in the cases that are seen based

21 upon what system you are working. And coming from

22 private disability, yes, the sku is heavily white

 1 collar.

 2   Conversely, though, remember that most

 3 private disability policies also requires an

 4 application for Social Security benefits. So even

 5 though you may not be seeing those cases, because

 6 they may be being dealt with because that person in

 7 private disability has already developed their

 8 record, gotten all the evidence, they have private

 9 insurance, which means they have treated; their file

10 is documented well. So when they come into the

11 system they have got everything they need and they

12 go through and you may not be seeing them, per se;

13 but they're there. They have to be there, because

14 they're required to be there.

15   So they don't come in -- I think into the

16 initial discussions of what we're looking at for the

17 end users we're talking about right now, which is

18 the DDS and ALJ, because you are looking at a

19 different population that is skewed in a different

20 way, that doesn't have access to a lot of things the

21 person in the private system has. But as part of

22 the charge to Social Security, you still are going

1   to have to deal with these people, because they are

2   there.

3   In fact, sometimes when you reach the ALJ

4   level, those are the people with the skills. Those

5   are the people with some of the higher level skills

6   that may be even harder to put your hands around.

7   Those are people that are really going to need some

8   examination as to how you are going to define that

9   skill. They may be a smaller population in a

10 smaller number, but the charge of Social Security is

11 all work. So they will be a part of that.

12   I think -- I always end up catching up

13 with you, which is making me feel very sad. I like

14 to stay with you. I think I'm catching up with

15 where you are starting from, David.

16   And I hear what Bob is saying, but we have

17 to look -- and any system we have has to look at all

18 work. That is the charge of the Administration.

19 They must look at all work. Whether you get the

20 little hanging fruit, as it's called, and the blue

21 collar, we still are going to have to design a

22 system that will get to those white collar.

1   Again, going back to something I said

2   earlier, we don't want to end up being like the DOT

3   and having people say well, we're using it for this,

4   and we never thought about it. We know that's going

5   to be one of the uses at some point, so we might as

6   well build it in.

7   DR. SCHRETLEN: And I don't mean to imply

8   that I don't think we should look at all work. I'm

9   just saying, how do you define "all"? And "all" in

10   my mind, if you covered 95 percent of the

11   occupations, you could say we have covered,

12   essentially, "all" work.

13   What I suppose that we could represent all

14   of the dimensions that we're interested in, in terms

15   of job demands and person characteristics, physical

16   strengths, and cognitive and behavioral and

17   everything; and we could capture those -- the entire

18   range in every single dimension with 1,000 different

19   jobs. And that those 1,000 jobs, homogenous jobs,

20   actually covered 95 percent of people who were

21   employed in the economy.

22   Then it seems to me that the advantage

1   would be, although, Sylvia we may not know what

2   exactly is a significant number in the national

3   economy, whether it's 10,000 jobs or 20 -- I don't

4   even know -- but we could get to -- it may well be

5   that we could include in the system -- in the OIS

6   only jobs that are unambiguously present in the

7   national economy.

8   And I just heard so many times through the

9   course of these meetings that an issue that gets

10   adjudicated is whether or not jobs are present in

11   significant numbers in the national economy; and it

12   seems like maybe we could take that -- maybe we

13   could develop a system that essentially takes that

14   off the table, and that could increase efficiency

15   enormously.

16   DR. WILSON: I think the point is just

17   that the DOT is out of date. The reason there is so

18   many things in there that don't exist in significant

19   numbers is because no one has maintained it. You

20   know, in the past titles would come and go, and so I

21   don't really think there is any disagreement here.

22   I think we want to get a metric, and the way the

1 taxonomy is designed is it is going to capture all

2 work. We went through the effort of including

3 instruments that focused on white collar,

4 professional, managerial kinds of work. We included

5 cognitive task analysis instruments in there because

6 of our concern of the criticism that some of the

7 taxonomies focus too much on physical work, even

8 though we included those too.

9   So I'm not the least bit concerned that

10 we're not going to make recommendations that won't

11 cover all work. I think that's different from a

12 sampling strategy. Here I agree 100 percent with

13 Bob that we need to start out, you know, if you want

14 to think of it as the big bang when this gets

15 launched, it better have every job in there that SSA

16 is likely to see right away.

17   Now, will we add more? Absolutely. But

18 from an implementation and getting people to use the

19 system, that's where, I think, we focus as other

20 users come in and say, hey, wait a minute, you know,

21 you don't have this in there or that in there. We

22 might alter sampling strategies, but we need to

1 start with -- with what they're likely to need and

2 what they're going to use, and then work out from

3 that to fill it out in terms of other

4 constituencies, and things of that sort.

5   DR. BARROS-BAILEY: Thanks, Dave, for

6 bringing that discussion. I think that's an

7 important discussion to have.

8   We're rounding out the hour, the last ten

9 minutes. I just wanted to bring a couple things.

10 We will be voting on the Minutes from the last

11 meeting and this meeting at our July

12 teleconferences. So we will have a vote then.

13   As Sylvia mentioned earlier, we are still

14 working on the details for the September location.

15 So as soon as that information is available, we will

16 get that out.

17   Are there any remaining issues that we

18 need to deal with?

19   Okay. I would entertain a motion to

20 adjourn the meeting.

21   DR. GIBSON: So moved.

22   DR. BARROS-BAILEY: Moved by Shanan. A

1   second by --

2   DR. WILSON: I will second that.

3   DR. BARROS-BAILEY: -- Mark.

4   We are adjourned, our third quarterly

5   meeting. Thank you.

6   (Whereupon, at 11:53 a.m., the meeting

7   was adjourned.)

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1   CERTIFICATE OF REPORTER

2

3   I, Stella R. Christian, A Certified

4   Shorthand Reporter, do hereby certify that I was

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9   I further certify that the transcript of

10   proceedings contains a true and correct transcript

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