

UNITED STATES OF AMERICA  
SOCIAL SECURITY ADMINISTRATION

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OCCUPATIONAL INFORMATION DEVELOPMENT  
ADVISORY PANEL

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QUARTERLY MEETING  
DAY 1

+ + + + +

Wednesday  
March 24, 2010

St. Louis, Missouri

The Quarterly Meeting of the Occupational Information Development Advisory Panel convened at 8:30 a.m., pursuant to notice, in the Colonnade Ballroom, 13th Floor, Sheraton St. Louis City Center, 400 South 14th Street, St. Louis, Missouri, Mary Barros-Bailey, Chair, presiding.

PANEL MEMBERS PRESENT:

MARY BARROS-BAILEY, Chair, Ph.D.  
ROBERT T. FRASER, Ph.D.  
SHANAN GWALTNEY GIBSON, Ph.D.  
THOMAS A. HARDY, J.D.  
H. ALLAN HUNT, Ph.D.  
SYLVIA E. KARMAN  
DEBORAH E. LECHNER  
ABIGAIL T. PANTER, Ph. D.  
DAVID J. SCHRETLEN, Ph.D.  
NANCY G. SHOR, J.D.  
MARK A. WILSON, Ph.D.

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ALSO PRESENT:

DEBRA TIDWELL-PETERS, Designated Federal  
Official

DEBBIE HARKIN, Staff

MICHAEL Dunn, Staff

ELIZABETH KENNEDY, Staff

SHIRLEEN ROTH, Staff

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A G E N D A

CALL TO ORDER..... 3

STATUS-PANEL SEPTEMBER 2009  
RECOMMENDATIONS..... 4  
    Mary Barros-Bailey Ph.D., Chair

PANEL DISCUSSION..... 8

BREAK..... 111

PANEL DISCUSSION..... 111

PUBLIC COMMENT..... 143

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

2 (9:37:41 a.m.)

3 MS. TIDWELL-PETERS: My name is  
4 Debra Tidwell-Peters, and I am the Designated  
5 Federal Officer for the Occupational  
6 Information Development Advisory Panel of the  
7 Social Security Administration. We'd like to  
8 welcome you to the second meeting of the  
9 Fiscal Year 10, and I will now turn the  
10 meeting over to the Panel Chair, Dr. Mary  
11 Barros-Bailey. Mary.

12 CHAIR BARROS-BAILEY: Thank you,  
13 Debra. Good morning, everybody. How is  
14 everybody doing this morning? Okay.

15 I'd like to thank you for your  
16 attendance, live or telephonically, to our  
17 second Quarterly Meeting, and wanted to note  
18 that Gunnar is out of the country on an  
19 emergency, so he won't be with us during this  
20 Quarterly Meeting.

21 For those listening in remotely, to  
22 follow our agenda, please go to our website,

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1 www.ssa.gov/oidap for a copy of the agenda to  
2 follow along. And for those who are attending  
3 our meeting for the first time, or who might  
4 be interested in activities and deliberations  
5 of the panel in our past meetings, if you go  
6 to our meeting page that I just announced, the  
7 SSA.gov/oidap, you can click on Past Agendas,  
8 the hotlink, and download PowerPoint  
9 presentations from those sites. And you can  
10 also look at the website for technical papers,  
11 and our first report by this panel delivered  
12 to the Commissioner in September 2009.

13 As we indicate at the start of each  
14 meeting, the charter of the Occupational  
15 Information Development Advisory Panel, or  
16 OIDAP, is to provide the Social Security  
17 Administration with independent advice and  
18 recommendations for the development of an  
19 Occupational Information system to replace the  
20 Dictionary of Occupational Titles in the  
21 Disability Determination process.

22 As you all know, our task is not to

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1 develop the OIS, itself. It is, instead, as  
2 our name implies, to provide advisory  
3 recommendations. Of critical importance that  
4 I really want to point out on our home page is  
5 to encourage public feedback and comment upon  
6 the report that we deliver to the Commissioner  
7 in September. Although we welcome input from  
8 stakeholders and the public at any point along  
9 our process, to help streamline input into the  
10 September report, we're strongly encouraging  
11 feedback from all sources by May 21<sup>st</sup>, 2010.

12           Following our review to our  
13 September report, Commissioner Astrue further  
14 requested our assistance in providing SSA with  
15 recommendations in four areas. These included  
16 recommendations in developing sampling and  
17 data collection plans for research and  
18 development, recommendations for the creation  
19 of a process to recruit job analysts,  
20 including methods for certification criteria  
21 and training. Third was recommendations for  
22 establishing associations between human

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1 functions, and the requirements of work that  
2 would serve the Disability Evaluation Process.

3 And fourth was recommendations for reviewing  
4 relevant documents, or reports that SSA  
5 identifies that may affect or inform SSA's  
6 work on the development of the OIS.

7 In our review of the agenda for  
8 this meeting, we will discuss plans and  
9 activities toward accomplishing these  
10 requests. If we look at the agenda for today,  
11 we are going to start off with a presentation  
12 by Sylvia Karman and myself in terms of the  
13 Social Security Administration project  
14 activities, and the integration with panel  
15 activities in terms of the roadmap.

16 We will also then be deliberating  
17 about these, and then go into presentations by  
18 Nancy Shor, the Chair of the User Needs and  
19 Relations Subcommittee, and also Mark Wilson,  
20 the Chair of the Research Subcommittee.

21 We will have public comment. I  
22 think at this point, we still only have one

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1 person that has signed up for public comment,  
2 so we anticipate that we will probably be  
3 ending the meeting early right after that  
4 public comment instead of going to the 3:00  
5 period.

6 And then going into tomorrow, we  
7 will be having a presentation by Margaret  
8 Hilton and Tom Plewes from the National  
9 Academies of Science in terms of their report,  
10 the panel report regarding the review of the  
11 O\*NET, and deliberation on that report, as  
12 well.

13 So, welcome, and I will turn this  
14 over to Sylvia to start us off.

15 MEMBER KARMAN: All right,  
16 everyone. Good morning. I just realized I  
17 need to pull this over so I can talk a little  
18 bit.

19 Basically, what I was hoping to do  
20 today is just give you a brief overview of  
21 what our staff has been working on since we  
22 last met in January, and, also, how that is --

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1 how that work is really incorporating a number  
2 of the recommendations that the panel made in  
3 2009, and then what next steps for the  
4 project. And then Mary is also going to  
5 discuss how that integrates with what the  
6 panel is going to be working on, or is,  
7 frankly, working on at this point.

8 All right. So, one of the initial  
9 projects that we've been diligently pursuing  
10 is the Occupational Medical Vocational Study.

11 For those of you who are listening in, or are  
12 here today and are not familiar with this  
13 study, basically, the -- our team is taking a  
14 look at the reviewed claims at the initial  
15 level and at the Appellate level, and  
16 approximately -- we're doing a proportional  
17 sample, so we're looking a little over 3,800  
18 initial-level cases, reviewed at the State  
19 Disability Determination Services, as well as  
20 a little over 1,100 Administrative Law Judge  
21 reviewed cases. And the idea there is to  
22 collect a variety of information. One is to

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1 look at what type of jobs people typically  
2 have when they apply for disability, so what  
3 is their past relevant work, what kinds of  
4 occupations are most frequently represented  
5 among the population of claimants that we see  
6 at Steps 4 and 5. And that information would  
7 be very helpful to us in terms of targeting,  
8 at least initially, the type of occupations we  
9 should look at first. So, that's one area of  
10 information we're looking for.

11 We're also interested in what the -  
12 - what we're calling the Medical Vocational  
13 Profile, is of individuals who apply for  
14 disability, and the final decision outcome, so  
15 we may want to look at what the -- what we  
16 call the limitations, were the physical or  
17 mental limitations documented in these cases,  
18 and the decision outcomes, what vocational  
19 rule may have applied, and when it was  
20 necessary, what jobs did the Agency cite as  
21 examples of work that the individual could  
22 still do, if it was a Step 5 decision, or at

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1 Step 4, what job, in fact, were we  
2 recommending as work that was indicative of  
3 their ability to continue to have function to  
4 do.

5 So, quickly, right -- we've just  
6 finished the Pilot Study. We did a pilot of  
7 about 120 initial-level case files. These are  
8 electronic cases, so the beauty of that is  
9 that we don't -- that's easy to pull up and  
10 review. We do have a data collection  
11 instrument, which we were able to pull  
12 together that has about 72 items.

13 Now, some of the 72 items  
14 potentially involve a number of multiple  
15 responses, so you could have, possibly, as  
16 much as 115 different responses. But for -  
17 the more straightforward approach to this is  
18 really there's about 72 questions on there, so  
19 we're looking at a number of data elements.

20 And we revised our data collection  
21 instrument, and some of the protocol based on  
22 the pilot, just to clarify a few things that

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1 came up during our Pilot Study. And we're  
2 beginning the full-blown study later this  
3 week, so I think we should be underway  
4 finishing this up by the summer. So, that's  
5 that study.

6 The next one is what we're calling  
7 the OIS Design Study I. One thing I want to  
8 point out is that this is not the Pilot Study.

9 Now, for those of you who have been following  
10 the panel's recommendations, the panel had  
11 recommended in 2009 that the Agency pursue a  
12 pilot. This is a precursor to the pilot, so  
13 before we even get to going out to do a pilot,  
14 we believe that we had some actual design  
15 questions that we needed to tackle. And not  
16 only that, but this also gives us an  
17 opportunity to examine some of the operational  
18 issues, just how one would conduct job  
19 analyses, recruiting individuals to do that,  
20 training them, finding the occupations in the  
21 economy. So, there are a number of  
22 operational issues that we need to pursue.

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1 And this Design Study, this initial foray  
2 gives us an opportunity to do that, as well as  
3 to test some technical design issues, so that  
4 as we move into the Pilot phase in the  
5 following year, we would be in a position to  
6 document why we've pursued certain design  
7 decisions based on the results of this  
8 particular study.

9 It also gives us an opportunity to  
10 look at some sampling issues, which we've  
11 already begun discussion with the Research  
12 Subcommittee, as well as the Taxonomy  
13 Subcommittee, so there's some work involved  
14 there. I think that the panel will be helping  
15 us with later on this year in terms of  
16 sampling issues.

17 So, once we've completed the draft  
18 study design, we intend to share that with not  
19 only the two Subcommittees, but really the  
20 entire panel for their review and comment, as  
21 well as our internal Social Security  
22 Workgroup. So, both the panel, and the

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1 Workgroup will have an opportunity to weigh in  
2 on that. We expect to conduct the study in  
3 Fiscal Year 2011.

4           The next investigation, or project  
5 that we have underway is a look at what  
6 classification systems are used  
7 internationally. And this really grew out of  
8 a series of questions that we've been asked by  
9 some of our senior executives in the Agency,  
10 as well as others outside of the Agency. So,  
11 we're examining what we've been hearing.  
12 Frankly, a number of countries around the  
13 world actually do use the DOT, so we're just  
14 checking in to see if, well, is that really  
15 true? And, also, otherwise, what other things  
16 -- what other classification systems are they  
17 using, and in what way? Because we're  
18 anticipating that if they were, in fact,  
19 interested in trying to make the kinds of  
20 decisions with occupational information that  
21 Social Security tries to make, that's probably  
22 why they are not using some of the more

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1 econometric-level data systems, but that  
2 remains to be seen. So, we are, in fact,  
3 conducting interviews with a number of  
4 officials already in Canada, and with the  
5 International Labor Organization. We're also  
6 talking with people in the European Union,  
7 Australia, New Zealand. We're following up  
8 now with some of the contacts that we've had  
9 just to get additional information beyond what  
10 we started with.

11 Some of the questions that we had,  
12 for example, in terms of how do you use the  
13 information in disability programs required  
14 our contact to go back and get that  
15 information. We expect a draft report in June,  
16 and a final report in August, which, again, of  
17 course, will be shared with the panel.

18 And something that actually has  
19 been taking -- another feature that our staff  
20 has been working on is just drafting the  
21 content model. And, in this case, the content  
22 model is -- right now consists of a draft of

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1 what we're considering to be mostly the person  
2 side aspect of work that we would be  
3 interested in gathering. What our staff has  
4 done is synthesize not only the panel's  
5 recommendations, but all of the user needs  
6 analyses that we did over the summer, some of  
7 which was incorporated in the panel's  
8 recommendations in the Appendices.

9 We've also taken a lot of the  
10 stakeholder information, external stakeholder  
11 information, as well as SSA stakeholder  
12 information and combined all of that. And,  
13 basically, synthesized that so that we could  
14 pull together what all of the different  
15 comments were, try to get at where there was  
16 duplication. But, for the most part, we  
17 didn't really want to screen a lot of that, so  
18 it was quite a lengthy document.

19 Last week, our staff, working with  
20 the Social Security OIS Development Work  
21 Group, met for an entire day to begin the  
22 process of calling the long list of content

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1 model person side elements. We do have a job  
2 site, but we have not filled that in. That's  
3 not at this stage of the game what we're  
4 working on. And we got through as much as --  
5 most, if not all, of the physical attributes  
6 on the person side. The work group and our  
7 staff are planning to meet again in a few  
8 weeks to continue that process. And from  
9 that, our staff is going to take and attempt  
10 to categorize a lot of the physical elements  
11 into whatever domains, categories, run that  
12 past the work group, and then from there,  
13 whatever comments come back, make those  
14 revisions. Then work from that to develop a  
15 draft of a person side instrument that would  
16 enable us to then also develop something on  
17 the work side. So, really the bottom line is,  
18 we're trying to pull together all of the  
19 elements that are of most interest to Social  
20 Security that we believe we need to know about  
21 on the work side that involves something that  
22 we assess on the person. So, that's where we

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1 are with that. We're expecting to complete the  
2 draft content model in May. As soon as we  
3 have something that has been reviewed within  
4 the Agency, and by the work group, we will  
5 intend to share that with all of you.

6 Then, for communications, this is  
7 another pretty substantive area for us,  
8 because there's a lot going on, and there's a  
9 lot of change in terms of what the Agency is  
10 undertaking with this project. So, a number  
11 of the recommendations, actually, all of the  
12 recommendations that the panel made in 2009  
13 are the things that our staff is now  
14 investigating, and a lot of work has also been  
15 going on with the User Needs and Relations  
16 Panel Subcommittee.

17 We are engaged with the Chief  
18 Information Officer's office staff to define a  
19 lot of web-based requirements for this  
20 project. A number of you may be familiar with  
21 an initiative called "Open Government." There  
22 is already with Social Security a website that

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1       may become available to us in early April,  
2       and we would like to use this project as sort  
3       of a sample, or an example of something that  
4       could be opened up on this website. It would  
5       really give, I guess, our stakeholders  
6       externally an opportunity to have a place to  
7       go to provide comments. The comments can be  
8       made -- that would be available on line, so I  
9       think that there's a lot of possibility there.

10               We are, also, exploring the Federal  
11       Register Notice issue, so that is under  
12       advisement now among our senior executives.  
13       And we are, also, scheduling -- we have  
14       scheduled recording of on-demand webinars. We  
15       do an enormous amount. Some of you have  
16       already been involved in this, and thank you  
17       to those of you who've tackled this, attending  
18       a number of presentations or conferences and  
19       giving presentations on what the panel  
20       recommendations have been, what Social  
21       Security is working on now, so we usually send  
22       either myself, or someone else from our staff

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1 to be there with the panel member. But,  
2 basically, we are also recording some webinars  
3 to make that available to people that could  
4 download that. It certainly helps us in terms  
5 of not needing to be in all places at all  
6 times. So, we'll see how well that goes. So,  
7 we're planning to be recording those shortly.

8

9 And we also have some fact sheets.

10 Thank you to those of you who have done that.

11 I know Shanan has done a lot of work in that  
12 area. And we're making those fact sheets  
13 available. I think this is just sort of,  
14 again, a follow-up to what we discussed in  
15 Dallas, that it would be helpful for a number  
16 of reasons if we could focus some of the more  
17 complex or difficult areas or topics that  
18 people have the most interest in, and put some  
19 FAQs out there for people to download, and  
20 use. Maybe that would be a lot more  
21 accessible than some of the information we  
22 have to-date.

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1           So, I know I've been talking to a  
2           few of you about the possibility of giving us  
3           some topics for other areas of FAQs that  
4           either you are aware of, or, perhaps, others  
5           have indicated are just topics that people are  
6           having a difficult time understanding exactly  
7           what we're meaning.

8           So, really the next steps that we  
9           have are to develop our functional  
10          requirements. We already have a working paper  
11          that looks at our overall plans for what the  
12          design elements for the Occupational  
13          Information System could be, and what the  
14          ramifications of that, what the implications  
15          of that might be, so we are needing to really  
16          develop an overall plan and functional  
17          requirements for the OIS that we would want to  
18          share with a number of interested offices and  
19          stakeholders within the Agency, and then, as  
20          well, with the panel. So, that's something  
21          that we're concerned about, and working on.

22                 Also, using the content model

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1 prototype, later this year we're working  
2 toward developing the instruments that would  
3 be necessary for us to collect information.  
4 So, that would be person side, indicating what  
5 it is that we are concerned about evaluating,  
6 or would like to collect data about in the  
7 world of work. And then what the job analysis  
8 instruments would actually look like, so  
9 that's -- these are two areas that we need to  
10 focus on.

11 And, in addition, we would need to  
12 be developing a recruitment plan for job  
13 analysts, as well as training and  
14 certification criteria, so we are beginning  
15 work on that, and Mary is going to talk a  
16 little bit more about what the implications  
17 are for the panel with that.

18 The next steps for our project in  
19 2010, of course, would be the OIS Design  
20 Study, so we're beginning the preparation for  
21 that. So, when we talk about job analysts at  
22 this stage of the game, we know we're talking

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1 about a small group that would be useful to  
2 conduct that test, and we can use as our  
3 experience of what might be needed moving  
4 forward, so that when we get to the stage of  
5 doing a pilot, we already have some experience  
6 under our belt with regard to what are we up  
7 against with training, what are we up against  
8 with recruitment? A lot of those just  
9 operational issues, as well as the design  
10 elements.

11 And then, as I mentioned before,  
12 content model, functional requirements, and  
13 development of instruments, and just continue  
14 to focus on how are we communicating? What  
15 kinds of issues are important to us as a  
16 panel, important to us as an Agency for our  
17 project? How is it that we want to be  
18 expressing what we're doing, what strategies  
19 might we need moving forward to make the  
20 connections with people who are stakeholders,  
21 who have a lot of interest in what we're  
22 doing, and what concerns are among the

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1 stakeholder communities? What are we hearing  
2 about that people have a lot of questions  
3 about? So, we have a lot of work ahead of us,  
4 and I think this is where Mary can jump in.  
5 Thanks.

6 CHAIR BARROS-BAILEY: Before I go  
7 into the review of the panel roadmap, maybe if  
8 anybody has questions for Sylvia at this  
9 point? Tom.

10 MEMBER HARDY: I just have a quick  
11 one. With all the research and papers you  
12 guys are doing, I recognize that you have to  
13 get them cleared before they can be shared  
14 with us, but after yesterday, when we were  
15 talking about ethics as SGEs, aren't we kind  
16 of within the Agency? Would you be able to  
17 check and see if there's some way of us  
18 getting some sort of extra approval to look at  
19 those, as opposed to waiting until they're all  
20 the way through?

21 MEMBER KARMAN: It's not really a  
22 matter of approval. It's really a matter of

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1 getting it through our staff so that our staff  
2 is actually at a point where we're comfortable  
3 delivering something that we feel we're in a  
4 position to discuss. So, a lot of the work  
5 that we're doing at this stage has been rather  
6 informal, for example, with the Research  
7 Subcommittee, when we are trying to tackle a  
8 particular problem, or issue, we may be in a  
9 position to ask some questions, and get some  
10 sort of early feedback. But the thing is, in  
11 order to share something with the entire  
12 panel, we're automatically making it public,  
13 so it's really not so much about you being an  
14 SGE, it's about the public process of FACA.  
15 So, I, personally, as manager for this, I'd  
16 prefer it if we were in a position to be able  
17 to deliver something to the panel as a whole  
18 that would be something that, I think, that  
19 our management would be fairly comfortable  
20 sharing publicly. So, I kind of feel like it  
21 has to, at least, get through a certain level  
22 of development, rather than just giving things

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1 out before they're really fully thought  
2 through.

3 MEMBER HARDY: That makes sense.  
4 Thanks.

5 MEMBER KARMAN: Thanks.

6 CHAIR BARROS-BAILEY: Any other  
7 questions? That's a perfect segue. Thank  
8 you, Tom, for the question, because I think it  
9 takes us to the next PowerPoint slide in terms  
10 of review. And in your packet, I'm not sure  
11 what tab it is, but you'll recognize from the  
12 January meeting that we had the roadmap, it  
13 looks the same, except there are a couple of  
14 things that are different about it. In  
15 January, I had indicated that I would be going  
16 through and assigning subcommittees to each of  
17 these line items. That has happened. And  
18 then the dates column has been reflected in  
19 terms of a -- a little bit differently in  
20 terms of start dates. We have status. Some  
21 of them have already ended, some of them are  
22 in the works, so it's a reflection of the

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1 changing time line there. Does everybody have  
2 a copy of it? Okay. Tab 2, okay. So,  
3 everybody is there.

4 Before we go through and review  
5 this, and I'm going to do it by function, I  
6 want to really make sure that people  
7 understand when it says "review," what it  
8 means, because there are really three  
9 different levels of what is meant by review.

10 In a couple of instances, review  
11 just means a presentation of something that  
12 the staff has done. For example, Sylvia  
13 talked about the International OIS. That's  
14 something that staff is investigating.  
15 They're going to be sharing it with us. We've  
16 had a couple of those instances in the past,  
17 so we're just going to be, basically,  
18 reviewing it because it's coming to us.

19 There's a second level of review  
20 which is more advisory, and it's something  
21 that the staff is working on, but they might  
22 want some feedback from us at a level, such

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1 as, perhaps, the OccMed Study, that type of  
2 thing. And then there's a third level that is  
3 a little bit more involved, and that's more  
4 consultative. And that's like the OIS Design  
5 Study with the Research Subcommittee, where  
6 there's some interchange back and forth with  
7 the staff as they're working out some issues,  
8 and some problems. But none of those, none of  
9 these three review require a deliverable from  
10 the panel. And I know that after September  
11 people are kind of gun shy about what does  
12 this mean, and am I going to have to produce  
13 another 750-page report? So, I just want to  
14 kind of ease some concerns there, and make  
15 sure that we are all recovering from  
16 September, that when it says "review," that is  
17 what is meant by that.

18 Let's see. Let's go ahead and go  
19 to the next slide before, again, we go to the  
20 detail. Now, there are some deliverables that  
21 are on our table, and let's talk about those a  
22 little bit before we get into the roadmap.

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1 So, what are the deliverables? The  
2 deliverables are pretty well spelled out.  
3 When we had the letter from the Commissioner  
4 that came to us in January, there were four  
5 things very well spelled out that SSA was  
6 asking for us in terms of our advice and  
7 recommendations to them. And I know that  
8 we're all very passionate about what we're  
9 doing, but to just make sure that we  
10 understand that it is advice and  
11 recommendations in these areas.

12 The first is the development of a  
13 sampling and data collection plan for Research  
14 and Development. As we'll see in the roadmap  
15 that we're going into, that is something that  
16 -- there's some inkling of that going on right  
17 now, but in terms of a longer term time line,  
18 that's further out there.

19 The next is the creation of a  
20 process for the recruitment, training, and  
21 certification of job analysts. And later on  
22 this morning, I'm going to go ahead and have

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1 Deb Lechner introduce the ad hoc group that is  
2 going to be working on that.

3           The third thing is the  
4 establishment -- the recommendations for the  
5 establishment of associations, or linkages  
6 between human functions and the requirements  
7 of work that serve the Disability Evaluation  
8 Process. So, as we're going through the  
9 roadmap, we're going to be seeing some  
10 recommendations there in terms of roundtables  
11 and activities toward that end.

12           The fourth deliverable is advice  
13 from the OIDAP to SSA on relevant documents or  
14 reports that SSA identifies that may affect or  
15 inform SSA's work on the OIS. And tomorrow,  
16 as everybody knows, the National Academies of  
17 Science will be presenting to us on the O\*NET  
18 report that was identified by SSA as one of  
19 those external reports they would like us to  
20 review and provide feedback on. And then,  
21 obviously, the last thing that is identified  
22 in that letter, and it's a function that

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1 happens more in terms of the administrative  
2 team, is the Annual Report of Activities on  
3 what we've done that's due in November.

4 I just want to reiterate what we  
5 talked about in January, which was the two  
6 main going kind of interdisciplinary  
7 subcommittees that we have are User Needs and  
8 Relations, and Research. The work side, and  
9 the person side, so the Taxonomy, Physical  
10 Demands and Mental Cognitive Subcommittees are  
11 all in tact. Those have not gone away. As  
12 we're going through the roadmap, we'll see  
13 areas that each of the subcommittees are going  
14 to be more involved with. And before we go  
15 through the roadmap in greater detail, I just  
16 want to also identify that the administrative  
17 team will be teleconferencing with the chairs  
18 of each of those subcommittees to be able to  
19 then go through in a lot more detail a plan  
20 for each of the subcommittees, so it's a lot  
21 more integrated. So, there will be greater  
22 detail in terms of our work plan for each of

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1 the subcommittees moving forward.

2 Let's see. One of the things that  
3 is not on that slide, but we will see, and I  
4 mentioned a little bit is the issue of  
5 roundtables that have been identified to-date.

6 And there might be more, depending on the  
7 needs moving forward. And what are the  
8 deliverables there? We've already had a  
9 couple of roundtables, so we have a really  
10 good prototype of what's going to look like.  
11 It won't be 750 pages long. It probably won't  
12 even be the length of a subcommittee report.  
13 Basically, I think Tom is the one that  
14 introduced the concept of the four-square  
15 document for the first roundtable that was  
16 done, which is helping to structure what is  
17 the concept, and what are the needs for the  
18 roundtable, helping, recruiting people to be  
19 part of that roundtable, and having some sort  
20 of short report process at the end of the  
21 roundtable in terms of findings. So, that's  
22 the extent of the deliverables in terms of the

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1 roundtable process.

2 Before I head into looking at the  
3 roadmap in a lot more detail, are there any  
4 questions?

5 MEMBER KARMAN: I thought I might  
6 mention this, because when Mary and I were  
7 talking about this earlier, it occurred to one  
8 of us that, or to both of us that the language  
9 that we're using here, deliverables are  
10 recommendations from the panel to SSA about  
11 the development of sampling, data collection,  
12 the creation of -- so, in other words, the  
13 panel is not expected to develop, create, do  
14 these things. You all would be in a position  
15 to provide the recommendations on it, and I  
16 just thought I would mention that, because it  
17 occurred to us that maybe that wasn't clear.

18 CHAIR BARROS-BAILEY: And, also, a  
19 lot of times, the public thinks that we, the  
20 panel, are developing the OIS, so it kind of  
21 clarifies it, that it's SSA that's developing  
22 the OIS, and we're providing advice and

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1 recommendations to that process. Go ahead,  
2 Alan.

3 MEMBER HUNT: Can you say a little  
4 bit more about the four-square, because I do  
5 not understand that concept.

6 CHAIR BARROS-BAILEY: Okay.

7 MEMBER HUNT: Just quickly.

8 CHAIR BARROS-BAILEY: Tom, do you  
9 want to describe that? He doesn't. Okay.  
10 The four-square document, I think that's what  
11 we're calling it, is kind of the parameters or  
12 the purpose of a roundtable, and what are the  
13 framework, the conceptual framework that is  
14 guiding that roundtable.

15 MEMBER KARMAN: Actually, another  
16 example of that was what we did with -- what  
17 David and Bob did with the Mental Cognitive  
18 Subcommittee roundtable last summer, in which  
19 case, basically framed the questions for the  
20 people who were attending the roundtable, some  
21 of the panel members who were coming to the  
22 roundtable, as well as some of the external --

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1 other external experts, non-panel experts who  
2 were invited, so that everybody understood  
3 really what the focus was for the day, or two  
4 days, whatever. In this case, it was just a  
5 day, and what the result would -- what the  
6 purpose would be, what the goals were, the  
7 objectives were for that particular  
8 roundtable. And I thought that, as an example,  
9 that particular roundtable is a good example.

10 So, we'd be happy to share that with you,  
11 Alan, because I have a suspicion I know why  
12 you're asking, because there's roundtables on  
13 here that you will have an interest in.

14 CHAIR BARROS-BAILEY: Okay. Are  
15 there any other questions before we kind of go  
16 through this in a lot more detail? Okay. And  
17 I don't know if we, necessarily, need to go  
18 through every single item in terms of each of  
19 the functions. I do want to point out that  
20 the very last page, page 6, there is an error,  
21 there's a duplication there. The very first  
22 one that says, "Person side data collection,"

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1 and then it says, "Job side data collection,"  
2 there isn't a person side data collection in  
3 terms of the review for plans to identify  
4 potential methods for data collection in terms  
5 of ad hoc work group, so I just want to point  
6 out that that's a duplication that shouldn't  
7 be there. Okay. Was that clear? Okay. The  
8 very last page, page 6, the very first item.  
9 Okay.

10 Now, as we are kind of moving  
11 through this, I just want to maybe globally go  
12 function-by-function. And some of these are  
13 very straightforward. Communications, I don't  
14 think it's a big surprise that the items here  
15 would be, for the most part, within User Needs  
16 and Relations in terms of working with Nancy,  
17 and her Subcommittee with the different items  
18 that are involved here. So, Nancy is going to  
19 be talking later in terms of reporting where  
20 everything is in terms of that.

21 I think the only item within  
22 Communication that User Needs and Relations

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1 doesn't deliver specifically is the Annual  
2 Report to the Social Security Administration.

3 That's a function more of the administrative  
4 team, and that would be myself, and Sylvia,  
5 and Debra Tidwell-Peters in terms of putting  
6 that together for the November delivery.

7 Moving on to the content model, and  
8 it would be -- some of these things have  
9 already happened. Last meeting we had  
10 Shirleen Roth and Mike Dunn delivering the SSA  
11 User Needs analysis, reviewing the OIS Design  
12 Study, some of the things that Sylvia already  
13 pointed out. The Lessons Learned Working  
14 Paper expected to be completed this spring,  
15 that we'll probably see in June, I'm assuming.

16 And then drafting of various things that  
17 we've seen Sylvia talk about in terms of how  
18 they fit into the content model development.

19 And then, you know, moving into the  
20 instrument development and testing, which is  
21 the big process coming up, and the job side,  
22 the linkage, and this is kind of the heart of

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1 it, is that when we look at what's involved,  
2 and if we see all the subcommittees involved  
3 there, it's everybody, it's Research, it's  
4 Taxonomy. There are some elements here that  
5 are going to involve the Physical and the  
6 Mental Cognitive review, some of the things  
7 possibly coming through from the feedback we  
8 get from users might need to have a review by  
9 those consultative subcommittees, as things  
10 come through, depending on what the need is  
11 from SSA. So, you can see there's a lot of  
12 activity there from a lot of groups with  
13 Research, probably, and Taxonomy being the two  
14 lead subcommittees within that.

15 Job analysis and sampling plans  
16 directly goes to the very first bullet that we  
17 have in terms of deliverables back to SSA. If  
18 you could see those dates there, they're later  
19 on in terms of the process. There's the  
20 second item there, the Roundtable on Labor  
21 Market Information Sampling Plans, which is  
22 probably what Alan was asking some questions

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1 about, in terms of coming up with some of  
2 those concepts directly related, again, to  
3 bullet number one. So, Research and Taxonomy  
4 being very involved in that process.

5 And then other, we put other, but,  
6 obviously, very involved, and job side data  
7 collection, that is the field job analysts, if  
8 that's not real clear there in terms of bullet  
9 number two from the Commissioner. And then  
10 the other being the National Academies of  
11 Science report. And we're also anticipating  
12 that we may need to have a roundtable to look  
13 at more technical matters, as those may emerge  
14 from that process.

15 That's a basic overview of where we  
16 are, and getting a lot more detailed,  
17 probably, as we talk to each of you  
18 individually. Are there any questions? Any  
19 thoughts?

20 MEMBER HUNT: It's going to be a  
21 very busy summer.

22 CHAIR BARROS-BAILEY: It will be a

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1 very busy summer. But we don't have a huge  
2 report due at the very end. Tom.

3 MEMBER HARDY: I'm just looking for  
4 clarification on the roundtable for the NAS  
5 report. What are you kind of thinking about  
6 that, because it's the first I've heard, and  
7 could you flesh it out a little bit?

8 CHAIR BARROS-BAILEY: I'm sorry. I  
9 think I have my cell going on.

10 I think I mentioned that I've  
11 reviewed the -- myself, I have a lot of  
12 questions in terms of things that are involved  
13 in that report that relate to advice and  
14 recommendations we be asked to give, or are  
15 asked to give specific to probably pages 11  
16 and 12 of our own report, which is the  
17 Occupational Data needs of SSA. So, I have  
18 questions about sampling, I have questions --  
19 I mean, I think I mentioned before that I've  
20 only summarized all but six out of the ten  
21 chapters, and I have 22 pages worth of  
22 questions typed out. So, I don't know if,

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1 necessarily, we'll have a chance to get  
2 everything addressed tomorrow. So, is there a  
3 need, possibly, to have a more technical look  
4 at these questions in terms of a roundtable?

5 MEMBER SCHRETLEN: This may be sort  
6 of out of place timewise, but do we know --  
7 what we've reviewed is a pre-publication  
8 copy. Do we know when the final report will  
9 come out yet?

10 CHAIR BARROS-BAILEY: We've been  
11 told that it's supposed to be finalized April  
12 of this year, and the -- Margaret and Tom  
13 presenting to us tomorrow can give us a  
14 briefing of what changes will occur in the  
15 final, so they're ready to brief us on that  
16 tomorrow.

17 MEMBER SCHRETLEN: And have they  
18 indicated whether there might be any further  
19 changes after this meeting, or is it -- at  
20 this point, they're committed to the final  
21 text?

22 CHAIR BARROS-BAILEY: It's my

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1 understanding they're committed, at this  
2 point.

3 MEMBER KARMAN: Getting to the  
4 question that Tom raised, the more -- a  
5 roundtable, or an opportunity to talk about  
6 some of the more technical aspects of the  
7 report. One of the things, I think, that  
8 would be very helpful for Social Security  
9 would be for us to -- for the panel to provide  
10 SSA with a review of the NAS Final Report, and  
11 the implications of that report to the  
12 development of an Occupational Information  
13 System tailored for our needs.

14 So, for example, I know that there  
15 were a number of recommendations throughout  
16 the NAS report to the Department of Labor in  
17 its development of a classification system  
18 having to do with sampling, having to do with  
19 data collection, having to do with the  
20 descriptors, and just a variety of issues  
21 that, frankly, are issues that we will need to  
22 tackle, as well. So, what do those

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1 recommendations mean for our purposes, even  
2 though a lot of our design decisions, because  
3 we have a different mission, and a different  
4 purpose than the Department of Labor did, and  
5 does for O\*NET, we, nonetheless, have some  
6 areas to take a look at, so what does that  
7 report really mean for our purposes? So, I  
8 think that's really where we're headed with  
9 that. And a lot of that information may be  
10 far more detailed than we could probably cover  
11 tomorrow with the NAS representatives.

12 MEMBER HARDY: I think my question  
13 was kind of the softball question for you, but  
14 I was just more curious as to what you saw as  
15 a process, who you'd be inviting, how you'd  
16 envision it working. But I agree there's so  
17 much information in there that we need to look  
18 at and respond to, there's got to be a way of  
19 getting to it. I was just curious as to  
20 process.

21 CHAIR BARROS-BAILEY: Okay. Any  
22 other questions? Okay. Well, we're rolling

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1 right through this. We thought there would be  
2 a lot more questions than there are.

3           You know, I'm going to take maybe  
4 this a little bit out of turn before we go  
5 into a break. One of the things, or one of  
6 the bullets up there, the second one was the  
7 recommendations from the OIDAP to SSA in terms  
8 of the creation of a process for recruiting  
9 job analysts. I have asked Deb Lechner to  
10 chair the ad hoc group providing SSA with  
11 advice and recommendations within that  
12 process, so maybe if I can ask Deb to talk a  
13 little bit about that, and also to introduce  
14 the members of that ad hoc group.

15           MEMBER LECHNER: Thanks, Mary.  
16 Well, it's a newly formed group. I think we  
17 had our first meeting this morning. Bob  
18 Fraser, and Shanan Gibson, and I met with Mary  
19 and Sylvia over breakfast to get a little bit  
20 of guidance about the direction that this ad  
21 hoc group should take. And, once again, we  
22 will be providing recommendations regarding

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1 developing a team of job analysts. And our  
2 first task is to get some preliminary  
3 recommendations to Sylvia over the next three  
4 weeks in terms of what things should be  
5 considered as we develop, or as SSA develops a  
6 team of analysts. And there will be a pilot  
7 team that gets developed, I understand, of  
8 approximately, we're thinking -- Sylvia  
9 thinking in the neighborhood of a couple of  
10 hundred analysts, initially, and then later  
11 expanded to be a much larger team. And the  
12 considerations that we discussed this morning  
13 in our meeting were things like training,  
14 certification, what professional groups have  
15 the background and training for being a  
16 potential pool from whom analysts could be  
17 identified, and then subsequently trained and  
18 certified. So, we will be making  
19 recommendations about all those issues that  
20 impact training and certification.

21 CHAIR BARROS-BAILEY: Okay. Are  
22 there any questions for Debra? Okay. Yes, go

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1 ahead, Alan.

2 MEMBER HUNT: Sorry. You said a  
3 couple of hundred, presumably distributed  
4 around the country with some coordination with  
5 sampling plans in terms of the pilot?

6 MEMBER KARMAN: Yes, I think --  
7 we've just discussed this like an hour ago,  
8 so, I mean, the idea would be whatever number  
9 of people we might -- Social Security might be  
10 needing just to conduct the OIS Design Study  
11 initially, so that would be a smaller group of  
12 people than would be envisioned for the longer  
13 term, certainly the pilot, and then, of  
14 course, the longer term data collection. So,  
15 the point I was making this morning with  
16 Debra, and Bob, and Shanan, was that what  
17 we're looking for initially is just the  
18 initial group, and what process might we  
19 pursue for recruitment, training,  
20 certification criteria, and that kind of thing  
21 for a small group of people, and then what  
22 recommendations might we have as a result of

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1 what we learn doing that for something for the  
2 longer term. So, that was really the point,  
3 is that we're starting with something small to  
4 get a sense of what's involved, and then look  
5 to see how that could be generalized to  
6 something, a larger effort. Just in case  
7 people are looking at this either in the  
8 roadmap or on the series of screens that I had  
9 for my presentation this morning, and not  
10 thinking that we're immediately going to the  
11 full-blown, what's the job analyst program for  
12 the entire nation, for the whole full project.  
13 We're just going to start with the first --  
14 what we need to conduct the first thing. So,  
15 I don't know what the total number is, but it  
16 does -- it would involve taking a look at the  
17 sampling issue to see how we would want to  
18 have those things integrated.

19 CHAIR BARROS-BAILEY: Nancy.

20 MEMBER SHOR: Sylvia, could you  
21 talk about -- we've got the ocean over there,  
22 I think. Could you talk about the chronology?

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1 I'm a little confused about training, or  
2 creating this pool of folks who may be good  
3 candidates as job analysts, how that  
4 intersects with developing the instruments?  
5 What is it that they would be asked to do?

6 MEMBER HUNT: Well, if I'm  
7 understanding your question, clearly, you  
8 wouldn't be able to train job analysts until  
9 you had an instrument, if that's what you're  
10 asking me. I mean, we would need a work side  
11 instrument, an actual job analysis instrument  
12 before you could train anybody. But in order  
13 for us to prepare to do whatever is necessary  
14 to get job analysts on board, we felt that we  
15 needed the expertise that was already on the  
16 panel. For example, Debra has done some work  
17 in the area of job analyst training using  
18 videos, so we just felt that we needed to just  
19 get started with that. So, that sort of  
20 getting out in front, and then once we get a  
21 job side instrument together, then we'll have  
22 something to actually train these people on,

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1 and protocol that goes with that instrument.  
2 Is that what you meant?

3 MEMBER SHOR: Yes.

4 MEMBER KARMAN: Yes.

5 MEMBER SHOR: The reason I was  
6 asking is, I think the panel and Social  
7 Security is going to be inundated with  
8 interest from people who are interested in  
9 this, and they're going to want to know does  
10 this start next week. So, I think it's  
11 important to kind of clarify that. As I  
12 understand it, you're setting up a structure  
13 and process, but that this isn't about people  
14 going out to analyze jobs starting next week.

15 MEMBER KARMAN: Correct. Right.  
16 What we're starting at this point is getting  
17 the panel through this ad hoc committee. And  
18 I appreciate you raising the question, Nancy.

19 We're establishing the ad hoc committee so  
20 that -- this is, for example -- I guess a good  
21 way to look at this, since Nancy brought the  
22 subject up with regard to timing, there are

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1 things that the Agency is doing now, that the  
2 staff is working on now, that the OIS  
3 Development Work Group is helping us with, and  
4 the panel may be involved at a variety of  
5 points in either reviewing the outcomes of  
6 these things, or hearing about it, or getting  
7 asked questions about it, so then there's --  
8 the panel having a foot in the current time  
9 frame. The panel also, to some extent, is out  
10 in front of the Agency by having a foot in the  
11 year to come, so this effort that we're  
12 beginning with the ad hoc subcommittee to look  
13 at recruitment issues, training issues,  
14 certification criteria, that kind of thing for  
15 job analysts is an example of the panel having  
16 its foot in the future. So, the Agency is not  
17 ready yet. It's the panel getting out in  
18 front so that it can help bring the Agency  
19 whatever information it's going to need as we  
20 get to the point of needing it, so that we  
21 don't get there with the job analysis  
22 instrument, and realize that now we need to go

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1 and train job analysts, and that sort of  
2 thing. We don't have anything already  
3 examined, or no program for our part, anyway,  
4 that's been developed.

5 CHAIR BARROS-BAILEY: Thank you for  
6 that clarification, Nancy. I think that's  
7 important. Any other questions or thoughts on  
8 this whole issue of the field job analysts, or  
9 even sequencing. I kind of see the ad hoc  
10 group being one of these that we can start  
11 doing some things on now, although there are  
12 other things that are in development. I mean,  
13 we could have started it later, but this is  
14 just as good a time to start at this point.  
15 Okay.

16 Before we head into the  
17 subcommittee reports, I'm going to go ahead  
18 and have us take a break and come back in 20  
19 minutes. Okay. Thank you.

20 (Whereupon, the proceedings went  
21 off the record at 10:36:28 a.m., and went back  
22 on the record at 10:58:49 a.m.)

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1 CHAIR BARROS-BAILEY: Okay. We're  
2 going to get started here in a little bit.  
3 Okay. We are going to be having Nancy Shor,  
4 our Chair of User Needs and Relations  
5 Subcommittee, to give a report to the panel in  
6 terms of the activities of the Subcommittee.  
7 And there were some questions before the break  
8 in terms of the roundtables, and I wanted to  
9 be able to maybe process that a little bit  
10 more. So, since we are going through the  
11 agenda fairly quickly, after lunch I have  
12 asked the people who will be some of the leads  
13 on some of those roundtables to maybe talk  
14 about those a little bit more, and take  
15 advantage of us all being together as a panel  
16 to be able to get some input into some of  
17 those roundtables. So, I will pass it on to  
18 Nancy.

19 MEMBER SHOR: Thank you. At Tab 2,  
20 just to go back to the roadmap, the very first  
21 page is a very nice summary of some of the  
22 things that the User Needs and Relations

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1 Subcommittee is working on.

2 I find it useful to think about  
3 communication as kind of a two-way street, so  
4 I'm going to regroup some of these, and try to  
5 present them, and get your thoughts and  
6 comments about outgoing communication from the  
7 panel to the public, and then, obviously, a  
8 second section on incoming, getting  
9 communication from the public coming into the  
10 panel.

11 And, first off, we've had a whole  
12 series of conference calls, catching people on  
13 the run in their cars, whatnot. I sure  
14 appreciate it, so I want to certainly thank  
15 Shanan, and Tom, and Deb, and Bob for their  
16 participation in numerous subcommittee  
17 conference calls.

18 Starting with outgoing, I think the  
19 most significant thing that's happened,  
20 obviously, is the posting of the report last  
21 fall, so that the report exists on Social  
22 Security's website, is accessible to anyone.

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1 I think one of the things that we have learned  
2 along the way, not really to anyone's  
3 surprise, is that folks would have asked for a  
4 point of entry, other than just sort of  
5 starting on page 1 and reading to page 750.

6 Is there a way to ease people in, identify  
7 what's in there, kind of give them a roadmap.

8 And the Fact Sheet is an approach that I  
9 think is very attractive as putting yourself  
10 in the shoes of somebody, a member of the  
11 public, kind of looking at this whole giant  
12 document and thinking wow, what is this? It  
13 seems kind of impenetrable. What could I use  
14 that would sort of help me get started  
15 understanding what's here?

16 I want to thank Shanan very much  
17 for jumping in and putting together the first  
18 Fact Sheet, which I think is -- it's three  
19 pages, and then I guess a page of the panel  
20 members' identity. It's a great size that  
21 people can use to kind of figure out what's  
22 the overall overarching plan here, what's the

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1 content of this report? So, one of the things  
2 that coming from our Subcommittee as a request  
3 to the Chairs of each of the other  
4 Subcommittees, wouldn't you like to do a Fact  
5 Sheet about what's of interest to your  
6 Subcommittee, and what your areas of concern  
7 are? Actually, it's not a request, it's more  
8 like we'd really like you to do this. So, I  
9 think if you take a look at what Shanah has  
10 done as kind of a template, and think about  
11 what could come from the other Subcommittees,  
12 we'd like to get that posted on the web page,  
13 as well. It's easily downloadable, people can  
14 take it and think about it. I think it would  
15 be a real helpful tool to get people to then  
16 say okay, I've digested this. Now, I'm ready  
17 to tackle the full report.

18 Kind of in a similar vein, I  
19 understand there's plans for getting videos  
20 done starring several of our colleagues here  
21 as another way to have, maybe, a 10-minute, in  
22 my understanding, segment that would be

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1 available on the web page that would be yet  
2 another way to talk about the issues, talk  
3 about what it is that the particular  
4 Subcommittee is trying to accomplish. And I  
5 think it's another way to help the public kind  
6 of have a place of entry rather than just  
7 being handed a copy of the report.

8           The other kind of new internet  
9 capacity with which I am barely familiar,  
10 Sylvia alluded to earlier this morning. It's  
11 a new initiative called "Open Government,"  
12 which has been, itself, I guess, as a process  
13 out there as part of gathering comment. And  
14 that comment period will soon end, or has  
15 ended. And the expectation is that Open  
16 Government will be a new way that federal  
17 agencies can communicate to the public, and I  
18 gather vice versa, that comments can come in  
19 to the Open Government site. So, one of the  
20 challenges, and a really good point that  
21 Shanan made in our last telephone call was  
22 figuring out how can we help the public have

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1 one-stop shopping so that going to the panel  
2 website is going to be where documents are  
3 available, and where links might be available  
4 to Open Government, that sort of thing. So,  
5 we're not expecting the public to go to a  
6 whole slew of different sites independently,  
7 but that if they come to the panel website,  
8 that's going to provide the links and  
9 connections to other sites of interest.

10 We've also been doing, or making  
11 plans for the old-fashioned style of  
12 communication, which is going to meeting live,  
13 in-person. And Mary and Sylvia and are going  
14 to be living out of their suitcase, as best I  
15 can tell, for the next couple of months, have  
16 an extensive array of speaking invitations  
17 coming up. One of them that I'm personally  
18 very pleased about is they will be speaking at  
19 the NOSSCR Conference in New Orleans in May,  
20 so that's going to be just, to me, the very  
21 best opportunity for communication, because  
22 it's the presentation, it's the factual

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1 information to get out there. But then it's  
2 the opportunity for whoever is speaking on  
3 behalf of the panel to open their ears, and  
4 listen to the questions that are coming back,  
5 identify what it is that's confusing,  
6 contentious, listen to somebody who's got  
7 something to say that we haven't thought  
8 about, that kind of thing.

9 So, I want to thank for his  
10 commitment to two, at least, future speaking  
11 engagements, Tom is on his way to Montana, and  
12 to Connecticut. And I think just to give you  
13 a flavor, Shanan is recently back from  
14 Minneapolis, and I would love to ask her to  
15 share with you what that experience was like.

16 MEMBER GIBSON: Actually, I want to  
17 do two things. First, I want to back up just  
18 a moment, and this relates to my trip to  
19 Minneapolis, and focus on the idea of the Fact  
20 Sheets, and how they can be helpful, because I  
21 was sitting here as we were saying this, and  
22 I'm guilty, I haven't suggested another one as

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1 the Chair of the Taxonomy Subcommittee at this  
2 point. But when I was contemplating what were  
3 actually recommended in terms of Taxonomy  
4 issues for a Disability Occupational  
5 Information System, and what I presented, and  
6 what the questions were that came out of  
7 Minneapolis, I'm sitting here right now  
8 thinking this can be the next Taxonomy Fact  
9 Sheet. Why did we suggest a new OIS? Well,  
10 actually, we suggested a new Disability OIS,  
11 and it's about purpose and need. People keep  
12 asking what is a generalized work activity?  
13 How is that different from a task like we had  
14 in the O\*NET, or why not the O\*NET, define a  
15 task?

16 The very questions we, as a panel,  
17 had, and have gone back over and tried to  
18 understand are the questions that are coming  
19 out of these events, and would make sense for  
20 the next Fact Sheet from my group, for  
21 example. So, the two have actually been very  
22 beneficial in that regard.

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1                   In terms of what happened in  
2 Minneapolis, first let me say that it was a  
3 group of rehabilitation professionals. They  
4 were exceedingly open and welcoming to us. It  
5 was myself, Debbie Harkin, and then our  
6 representative there who brought us was really  
7 Angie Heitzman, who's been at several of our  
8 meetings, and, as you know, is great to work  
9 with.

10                   I think the presentation was well-  
11 received, although, initially, the large  
12 audience didn't, necessarily, understand why  
13 this was important to them, at least not as a  
14 whole. There were several members who were  
15 highly interested, and several who were  
16 tangentially why are you here, explain this to  
17 us. So, one of my Lessons Learned was that  
18 it's very important to have a member of that  
19 group do the introduction to the presentation,  
20 and why you're there.

21                   Angie very well set the stage for  
22 us by saying you need to -- I'm one of you,

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1 and you need to care about this, because what  
2 they do will impact us this way. So, that  
3 type of introduction and laying the foundation  
4 for why we were there was very important,  
5 because within this group, there were a lot of  
6 individuals who earn their primary living  
7 working with worker's compensation instead of  
8 as vocational experts, so they didn't,  
9 necessarily, see that immediate tie-in. So,  
10 that was very helpful to have that delineated  
11 in advance, and have someone from the group be  
12 part of the presentation. I think that made  
13 them more receptive to what we had to say.

14           Within the audience, itself, you  
15 find that some people are inherently  
16 motivated. It's kind of like teaching, a  
17 classroom setting with students, and others  
18 that are less so, so I think it was very  
19 important that we were able to talk about how  
20 this related to what they do, how it will  
21 impact what they'll do going forth, and how --  
22 and kind of what is it we are doing, and what

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1 is it we're not doing here. So, that was very  
2 helpful.

3 One of the questions we've had as a  
4 panel that has come up, and I thought this was  
5 an excellent opportunity, is I got a chance to  
6 interact with one of the representatives from  
7 Oasis, which is a vendor, and he was very  
8 helpful, because one of the members said are  
9 our vendors, the people who create tools we  
10 like to use, what do they think about this?  
11 And he very bluntly said, if they had the data  
12 tomorrow, we'd include it in our next release,  
13 was the answer I got. Now, whatever happens,  
14 we will integrate and work with, because it's  
15 important to you, and it's important to our  
16 client base. So, there's the recognition  
17 among the vendors that they know something is  
18 afoot and needs to change, and they're not,  
19 necessarily - or, in many regards, they're  
20 actually very supportive of this model, and  
21 they're waiting to see what we'll do, and how  
22 they can use it, because they see it as an

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1 opportunity for their technology and product  
2 to evolve, as well. So, that was an outcome  
3 that I wasn't, necessarily, expecting, but it  
4 was very, very good.

5 Another Lesson Learned would be  
6 that we probably -- I anticipated more  
7 questions, I guess, and I actually had fewer  
8 questions than anticipated. Maybe we were  
9 overly prepared and tried to hit everything in  
10 the slides in advance, but I think leaving  
11 time afterwards for people to come up and  
12 speak to you one-on-one is imperative, because  
13 just like in a classroom setting, sometimes  
14 people don't want to raise their hand and ask  
15 the question that they think is insane, but we  
16 did have several people come up afterwards and  
17 offer insight. And that was very helpful, as  
18 well.

19 MEMBER SHOR: Thank you very much.

20 MEMBER SCHRETLEN: Nancy.

21 MEMBER SHOR: Yes.

22 MEMBER SCHRETLEN: I want to

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1 derail, but I am curious, because since Mary  
2 and Sylvia have both gone out, and I suppose  
3 you have, as well, I'm not sure who all has  
4 gone out and done this, what are some of the  
5 other experiences, or do you want to hold off  
6 on that? But I'd be curious to hear what  
7 kinds of reactions, and questions, and  
8 concerns have been expressed.

9 MEMBER SHOR: Well, I was just  
10 going to jump in, and then we'll ask Mary and  
11 Sylvia for their specific experience. We  
12 devised a form to ask the presenter to bring  
13 back the feedback. So, it's not a perfect  
14 tool, but it will be, I think, real helpful to  
15 identify what were the types of questions,  
16 what could you answer, what did you not know  
17 the answer to, which also may inform the  
18 presentations of the future. So, yes, we'd  
19 like to use this as more than just a static  
20 event, but take advantage of the input coming  
21 back.

22 MEMBER GIBSON: Can I add one more

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1 thing? The Fact Sheet was invaluable, and I'm  
2 just saying that because I found that very few  
3 people had actually read the report, for  
4 obvious reasons, so the fact that we gave them  
5 the Fact Sheet when we were there as a  
6 handout, they liked that, too.

7 CHAIR BARROS-BAILEY: And we just a  
8 copy of the Fact Sheet, and I just want to  
9 congratulate you, it's beautiful. It looks  
10 very nice, very professional. I think it's a  
11 great piece.

12 MEMBER SHOR: Mary and Sylvia, do  
13 you have any comments that you'd make at this  
14 point? Most of your speaking lies ahead, I  
15 know.

16 CHAIR BARROS-BAILEY: Yes, I think  
17 we lost track, but between now and June, the  
18 end of June, we probably have five or six  
19 presentations we're doing throughout the  
20 country. And Sylvia and I presented at  
21 NOSSCR, I think was our first presentation  
22 after the report. We presented at IARP a

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1 couple of sessions, and we did a webinar in  
2 January, the day before our January meeting. I  
3 haven't gotten the feedback yet from that  
4 January meeting, but I know that as -- because  
5 of that January webinar, a couple of the  
6 invitations came from people who were  
7 listening in on that, so we've kind of refined  
8 the process as we have gone along. We have  
9 the standard set of slides that Debbie Harkin  
10 helped provide, that become kind of a cache  
11 for us to be able to use and modify for the  
12 different audiences. I think it's very  
13 helpful to be able to talk to different people  
14 from different audiences, like with you, with  
15 the NOSSCR presentation coming up. Our next  
16 presentation that Sylvia and I are doing is  
17 going to be the National Council of Rehab  
18 Educators, so these are all the educators for  
19 rehab counseling programs, over 100 of them  
20 throughout the country, Master's and Doctoral-  
21 level, so kind of the research, and the  
22 academic branch of the rehab world. And we're

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1 going to be presenting at a general session,  
2 and then doing a breakout for that, as well.  
3 So, that's a different audience, more of an  
4 academic audience, so I think because of the  
5 different audiences that we'll be presenting  
6 at, it's going to be very valuable to probably  
7 process that. Not just Sylvia and I, but  
8 Tom's going to be out, Shanan is going to be  
9 in Texas with Tom Johns, so a lot of us are  
10 going to be out between now and the end of  
11 June at different presentations. And that'll  
12 give us a lot of information that I think  
13 will, as Nancy was saying, help kind of guide  
14 our process, but, also, allow us to know what  
15 are the priority topic areas for not only Fact  
16 Sheets, but the 10-minute clips on the  
17 webinars are basically talking Fact Sheets, so  
18 a different presentation, that if we need to  
19 go and do more in-depth webinars, we can based  
20 on maybe more content information, kind of  
21 like the professional development that Mark  
22 and Shanan did for us yesterday, if we need to

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1 go a lot more detailed.

2 Sylvia, did you want to say  
3 anything about in terms of our presentations?

4 I think we found a lot of the same things  
5 that Shanan did, but you might have some  
6 thoughts.

7 MEMBER KARMAN: Yes. I think you've  
8 covered some of the things that we've already  
9 encountered in terms of questions. One of the  
10 things we have done, for those of you who are  
11 slated to go out over the next few months to  
12 do presentations, or if, in fact, an  
13 invitation comes up, do let, obviously, Nancy  
14 Shor know, and certainly our Designated  
15 Federal Officer, Debra, so that she can begin  
16 to coordinate that with the entity that is  
17 interested in having you speak.

18 Also, we like to coordinate a panel  
19 member going out, when possible, with somebody  
20 from Social Security, so usually it's somebody  
21 from our staff. Occasionally, some of the  
22 members of our OIS Development Work Group have

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1 graciously offered to also attend. And I  
2 think part of the reason for that has been  
3 that we have found, Mary and I have found that  
4 frequently, even though we may be -- the topic  
5 may be the panel's recommendations from 2009,  
6 inevitably, we get a lot of questions that are  
7 really directed at Social Security, and it  
8 just may be easier, frankly, to have somebody  
9 from the Agency there to sort of take up those  
10 questions, or at least be in a position to  
11 refer those questions to the appropriate  
12 office, or whatever. So, really, it's a  
13 matter of support, I think, for the panel to  
14 have someone from SSA there.

15 Also, we have been preparing  
16 generic PowerPoints, and list of the top ten  
17 questions that we tend to get, and possible  
18 answers, depending on the audience. So, just  
19 sort of kind of prep material for folks going  
20 out so that everybody kind of has something to  
21 start with. And, obviously, they can take  
22 that generic presentation, and rearrange that

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1 to suit their particular needs, but at least  
2 you've got something to start with.

3 And I know that as we go forward, I  
4 think some of the things that we're wanting to  
5 tackle are just some of the areas of possible  
6 confusion, like one simple area is, what does  
7 the panel do versus what does SSA do? That,  
8 in and of itself, I think to some degree, may  
9 be there is some confusion that the panel is  
10 there in an advisory capacity, and Social  
11 Security staff is actually conducting the  
12 work. So, that right there might be something  
13 of an area of clarification.

14 Another area of clarification we  
15 still run into is, because the DOT for many,  
16 many years has been so much a part of our  
17 process and our policy, we get a lot of policy  
18 questions, which, of course, our panel isn't  
19 taking up at this juncture, nor is our team  
20 working on anything of that nature, so that's  
21 something else that we frequently find we have  
22 to clarify. But, for the most part, we just

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1 get a lot of interest, and a lot of people  
2 really -- it seems to me just very  
3 anticipatory, people are just really looking  
4 forward to this. And, to some degree, there  
5 may be some anxiety around that, because it's  
6 different, it's new. And David and I have  
7 discussed this, there's people living in a lot  
8 of ambiguity as we move forward, and that's  
9 hard. That's hard for all of us, but it  
10 certainly is for stakeholders, and  
11 beneficiaries wondering what this might look  
12 like.

13 CHAIR BARROS-BAILEY: But I think  
14 one of the most important lessons in this  
15 whole process is that the communication is  
16 really important. And I think we've said it  
17 from our inaugural meeting on that we're  
18 trying to be very transparent with this  
19 process, so information in/information out is  
20 vital.

21 MEMBER SHOR: Thank you very much.  
22 This is just a plea, request to panel

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1 members, as well as everybody who may be  
2 listening out there, if you can suggest  
3 organizations that you think would have an  
4 interest in the panel's work, we're not shy.  
5 We're happy to invite ourselves to speak, so  
6 we'd be delighted to hear about organizations,  
7 and your help in making that connection.

8 So, in addition to speaking to --

9 MEMBER SCHRETLEN: Nancy, on that  
10 point -

11 MEMBER SHOR: Yes, David.

12 MEMBER SCHRETLEN: -- do you want  
13 us to contact organizations first, or you?  
14 How do you want it?

15 MEMBER SHOR: However you want.

16 MEMBER SCHRETLEN: Okay.

17 MEMBER SHOR: Whatever is the most  
18 comfortable for you. That would be great.

19 The final category, and this really  
20 is designed to include those people who are  
21 listening on the phone, as you know, when you  
22 called in, you were asked for your

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1 affiliation. If you are a first-time  
2 listener, you'll probably be getting a phone  
3 call from a panel member within the next  
4 couple of weeks. We're simply following up,  
5 because you've demonstrated your interest in  
6 what the panel is doing. We'd like to just  
7 follow-up with you about your interest, and to  
8 encourage you to submit comments, if that's  
9 something that you'd like to do. So, we can't  
10 see you, we know you're out there, and we're  
11 certainly interested in what you'd like to  
12 share with the panel, as well.

13 So, that's kind of where we are in  
14 terms of outgoing communication. But turning  
15 for a minute to incoming communication, we are  
16 making progress, I think, on a couple of  
17 fronts with trying to crack the nut that I  
18 think is real important to crack, which is  
19 that any comment, any feedback that comes into  
20 the panel, we need a process where the public  
21 can see it, the person submitting it can see  
22 it, and know that it was received. And,

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1 obviously, all of us can see it.

2 Mary and I had signed a letter to  
3 the Commissioner in early February, in which  
4 we kind of did two things. One was to  
5 identify we were extending the comment period,  
6 which had been closing, I believe, in  
7 February. The new date is now May 21<sup>st</sup>, so the  
8 Federal Register Notice for this meeting, kind  
9 of buried in it at the bottom is a reference  
10 that the comment period is now open until May  
11 21<sup>st</sup>, so that's good.

12 The second is, we were asking for  
13 his decision to allow us to use the Federal  
14 Register process as a place to post -- to  
15 receive comments and post comments. That's a  
16 medium that is very comfortable and familiar  
17 to lots of people interacting with the Agency,  
18 because it follows the standard Notice of  
19 Proposed Rulemaking protocol. It now appears  
20 that the Open Government may turn out to be an  
21 alternative, so we're waiting to hear back on  
22 which, or maybe both of these portals will

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1 become available. But, obviously, I think I  
2 speak for everybody, the sooner we can tackle  
3 and solve this problem of how to get comments  
4 available to everybody, I think the better.

5 We, at the Subcommittee, are open  
6 to the idea of trying to summarize them as we  
7 try to distribute them to the appropriate  
8 Subcommittee. But at the moment, frankly, the  
9 numbers are pretty low, and I don't think it's  
10 going to be too burdensome to give the  
11 Subcommittees the comments that we receive.  
12 If the numbers pick up, and it looks as though  
13 the Subcommittees are being asked to take on  
14 too much, we'll try to summarize those. But I  
15 think, at this point, it's a little early to  
16 make a decision about that.

17 So, the two areas of feedback that  
18 we're really looking to process right now are  
19 both anything that comes in in writing that  
20 could be construed as a comment, and I mean  
21 that in the most generic broad use of the  
22 word. And then, secondly, the feedback forms

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1 that come back from speakers that contain  
2 information about, this is the question I was  
3 asked, or this is the -- I could tell from the  
4 faces out there, and those of you in the  
5 teaching profession are going to have a real  
6 advantage there, but I could tell as I was  
7 speaking that the blank look I was getting,  
8 this was not communicating. So, I think all  
9 of that information, I think, is going to be  
10 real helpful.

11 And I'd really just like to  
12 conclude. I think Sylvia had a great segue to  
13 talk about a lot of the commenters out there  
14 are in sort of an anticipatory mode. Right  
15 now, a comment that I hear frequently, both  
16 from the attorneys I speak to all the time,  
17 who represent claimants, as well as a number  
18 of folks that I've called to follow-up,  
19 because they were on our list of listeners at  
20 previous meetings, is completely on board  
21 with the need to update the DOT, and  
22 everything that you're talking about on the

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1 physical side feels real comfortable and  
2 great. You're talking about adding Mental and  
3 Cognitive, and I really don't understand what  
4 that means. So, as soon as you can show me a  
5 job, here it is in the DOT, here it is as a  
6 sample of what it might look like in a new  
7 Occupational Information System, then I think  
8 is when people will be in a position to really  
9 offer comments.

10 Most people are telling me that  
11 right now things are so theoretical, that it's  
12 very hard for them to offer anything concrete.

13 So, for that reason, I think it's just  
14 important to clarify both for panel members,  
15 and anyone else who may be listening, that we  
16 have set a comment period of May 21<sup>st</sup>, because,  
17 let's face it, deadlines are very helpful.  
18 And I expect we will be hearing from lots of  
19 organizations in or around May 20<sup>th</sup>, but the  
20 opportunity to offer comments does not end, so  
21 that at any point during the panel's existence  
22 that somebody wants to offer a comment in

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1 reaction to something new that's posted, or  
2 just because they're ready to offer a comment,  
3 I wouldn't want anybody to have a takeaway  
4 that May 22<sup>nd</sup>, you're out of luck, you're too  
5 late.

6           So, I think the comments are really  
7 important. It helps the panel understand  
8 what's ambiguous and clarify. It may bring  
9 things to the panel that have not been  
10 addressed, or thought about before. So, it's  
11 really designed -- my request is designed to  
12 encourage people, if you have comments,  
13 hopefully, before May 21<sup>st</sup>, because it's going  
14 to be easiest for us to process them, but if  
15 there are things that you want the panel to be  
16 aware of at any stage down the road, please  
17 get those to us. And we're working on a  
18 process internally to make sure that things  
19 are distributed to panel members, not in a  
20 piecemeal fashion, because I think that's hard  
21 to work with, but in kind of an organized  
22 fashion. We'll try to pull things together by

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1 topic, as well. So, I'd be happy to take  
2 suggestions, comments.

3 CHAIR BARROS-BAILEY: Shanan.

4 MEMBER GIBSON: What Nancy said  
5 just reminded me of another -- one of the  
6 questions that does seem to come up, is our  
7 time line. And I think it was very helpful  
8 that we had a common answer that was  
9 established, but I do think that's a very  
10 common question, because of this anticipatory  
11 nature, and where are you, and when is this  
12 going forth? So, being able to discuss our  
13 time line is very important to the different  
14 end-users out there.

15 CHAIR BARROS-BAILEY: Thank you.  
16 Sylvia.

17 MEMBER KARMAN: Yes, I just wanted  
18 to have sort of a follow on to a question that  
19 David raised earlier about reaching --  
20 whatever outreach. A number of us have  
21 contacts outside, what we call outside the  
22 Agency, obviously, in your professional

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1 domain, so when a speaking engagement arises,  
2 or you know you're going to be attending a  
3 conference, and you're asked, it would be  
4 helpful if, in addition to letting Nancy know,  
5 if as soon as that occurs, that you let Debra  
6 Tidwell-Peters know. She, as our DFO, would  
7 be the contact within the Agency that would  
8 handle the external contact. If we have that  
9 person's name, and their contact information,  
10 and we're able to establish, first of all,  
11 what time frame they're interested in, we need  
12 to get budget clearance to have people travel,  
13 and that sort of thing. So, those kinds of  
14 things are operating.

15 Also, it's also helpful for us to  
16 have a sense of what exactly the topic is that  
17 they have in mind, and what the panel members'  
18 comfort level is with that, as well as what  
19 our position might be with regard to that,  
20 because sometimes, as Nancy's certainly coming  
21 across, people are anticipating what's coming  
22 up, and they may be asking us to speak about

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1 things that we're ready yet, because they're  
2 just simply not there yet. So, that means we  
3 may need to go back and re-frame that, or ask  
4 if well, would your organization still be  
5 interested if all we could really deliver at  
6 this point in terms of a presentation is  
7 regarding thus and such, because we wouldn't  
8 want to disappoint people. So, that's  
9 helpful. That's all I have. Thanks.

10 CHAIR BARROS-BAILEY: I could just  
11 give an example of things that come to me,  
12 sometimes. People contact me, and I'll  
13 usually respond, if it's an email, and include  
14 Nancy, and Sylvia, and Debra on that email as  
15 trying to clarify what it is that they want,  
16 and need, and indicate to them that somebody  
17 else -- somebody will get back to them, so  
18 including them in the process would be  
19 helpful.

20 Okay. Any other questions or  
21 comments for Nancy? Okay.

22 Before I have mark present, it

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1 occurred to me, as Shanan was speaking  
2 earlier, because this happened at the end of  
3 the last panel meeting, that maybe we hadn't  
4 made a public announcement of a couple of  
5 changes in terms of Subcommittee Chairs. So,  
6 I just wanted to be able to indicate that the  
7 Research Subcommittee that was Chaired by  
8 Sylvia, she is a member of that Subcommittee,  
9 but Mark is our Chair. Thank you for saying  
10 yes, for taking that position. And he now  
11 does not Chair Taxonomy, Shanan is the Chair  
12 of Taxonomy Subcommittee, so as I pass it on  
13 to our Research Subcommittee Chair, Mark, to  
14 talk about the activities that you've been  
15 involved with. Thank you.

16 MEMBER WILSON: Thanks, Mary. If  
17 you remember from the roadmap document, that  
18 is a good place to review the various  
19 activities of the Research Committee, that  
20 have either taken place, or about to. There  
21 are three that I want to mention, and I think  
22 later on we're doing to discuss some potential

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1 other activities with regard to roundtables,  
2 so I'll hold that off until later. But,  
3 certainly, the three most prominent activities  
4 that the Research Committee is engaged in, is  
5 comments and advice regarding the National  
6 Academies of Science study. And we can  
7 discuss more about that, or answer any  
8 questions from the panel that you might have.

9 The second activity is what's  
10 referred to in the roadmap as OIS Design Study  
11 I, and this is the beginning of a potential  
12 Research project around OIS-related issues,  
13 and we have also provided some advice. And  
14 the third primary activity, as some of you  
15 know who were there, is professional  
16 development activity, which I guess is kind of  
17 a joint effort of Research and Taxonomy at  
18 this point in terms of providing some more  
19 background, some more frames of reference  
20 around research-related issued.

21 If the User Needs focus is more  
22 external, I think it would be fair to say that

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1 the Research Committee, at least the way it's  
2 conceived now, is much more of an internal  
3 contemplative, providing advice about  
4 research-related issues. For the most part, I  
5 don't see us advocating a particular approach  
6 to research so much as responding to questions  
7 and inquiries based on our expertise, and  
8 things of that sort. That was certainly how  
9 the professional development exercise came  
10 about, as the result of a number of questions,  
11 why do you think this way? Please be more  
12 specific, and less theoretical, about what you  
13 mean by some of these issues. And there I  
14 would like to take an opportunity to thank  
15 Shanan, if for no other reason, that everybody  
16 seems to thank, Shanan, but as someone who's  
17 willing to do a lot of work. And, in this  
18 particular case, in terms of the professional  
19 development exercise, it wasn't particularly  
20 apparent, because the activities worked so  
21 well, but what the panel, and staff members,  
22 and others didn't realize is the enormous

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1 number of hours it gets attributed in order to  
2 make some of these programs work. And Shanan  
3 did an amazing job, and it really is  
4 appreciated. And not only that, she put up  
5 with my attempts at humor while I was doing my  
6 presentation, so since we're in my home state,  
7 the message here is that Midwesterners don't  
8 torture people, other than the ones that they  
9 like. It's a sign of respect. If we're not  
10 doing that, that means that there's something  
11 wrong. So, we appreciate that. I don't know  
12 if that's what you were looking for in terms  
13 of a review, but I'd be happy to answer  
14 questions people have.

15 CHAIR BARROS-BAILEY: Are there any  
16 questions for that activities in terms of the  
17 Subcommittee, and what they've been doing? I  
18 know that each of the Subcommittees is meeting  
19 every two weeks, so they've been very active  
20 in terms of the last three months. And it  
21 looks like Nancy wants to say something.

22 MEMBER SHOR: First of all, I want

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1 to thank Debra for reminding me what I forgot.

2 This is just one last item on User Needs  
3 concerning webinars, which are scheduled to  
4 record the first week in May. The first one  
5 will be an overview, and the panel  
6 recommendations. The second is the Fact Sheet  
7 with specific information from the  
8 recommendations. And once recorded, the  
9 webinars will be available from the website  
10 on-demand. So, I'm just going to add one  
11 thing that I think would be real useful. As  
12 soon as those are up and running, how about we  
13 get that information out at least to the panel  
14 members to make sure, unless you're visiting  
15 the website everyday, but just in case you're  
16 not, we could get a quick email out to you,  
17 and just let you know that they're there, and  
18 go forward with that. So, thank you very much.

19 (Off mic comment.)

20 CHAIR BARROS-BAILEY: Yes. For  
21 those that didn't hear Debra that are on the  
22 phone, we do have the electronic mailing list

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1 that if you want to be on it, just email  
2 oidap@ssa.gov, and ask to be put on it. And  
3 any time there's an announcement for a  
4 meeting, or when the webinars get put up, or  
5 anything along those lines, that list does get  
6 notified in terms of some push marketing.

7 Tom, you look like you want to say  
8 something.

9 MEMBER HARDY: Just two things came  
10 to mind for me about User Needs that we had  
11 talked about, and we haven't gone back to yet.

12 One was taking the Fact Sheet, once we had  
13 it, and starting to disseminate it to people  
14 who have called in to listen. And that might  
15 be something, now that we have a Fact Sheet,  
16 that we could look into doing, as a  
17 suggestion.

18 And the other thing was, I don't  
19 know if this is going to be encapsulated  
20 somewhere, but have we considered a Fact Sheet  
21 that compares DOT and O\*NET? I know we had  
22 talked about that a little bit as something

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1 that we could maybe focus on as a full Fact  
2 Sheet that talks about why we are going in the  
3 direction we're going specific to those two  
4 areas. And are any of the Subcommittees  
5 working on that?

6 CHAIR BARROS-BAILEY: Sylvia?

7 MEMBER KARMAN: I don't know if any  
8 of the Subcommittees are working on it, but  
9 our staff recently assembled some talking  
10 points for senior executives in the Agency, so  
11 that when they are out and about, and they are  
12 asked questions that they have responses that  
13 are appropriately direct, yet given the  
14 variety of audiences, we tried to put  
15 something together that would be accessible to  
16 a number of audiences. So, we can certainly  
17 provide that to the User Needs and Relations  
18 Subcommittee in some draft format for panel  
19 members to consider. And I'm not really -- I  
20 don't know which Subcommittee. I'm guessing,  
21 maybe, that's something that, perhaps, Mark  
22 and Shanan might want to take a look at. At

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1 least, Shanan, certainly. Shanan.

2 CHAIR BARROS-BAILEY: See, I used  
3 to call him Mark all the time when he was the  
4 Chair of Taxonomy. Now I get to call on you,  
5 so it looks like questions are coming your  
6 way.

7 MEMBER GIBSON: And that's funny,  
8 because the one thing I was actually doing  
9 while you were asking me a question was trying  
10 to think of how to respond to Tom's question,  
11 and was going to say one of the things that  
12 needs to be done by the User Needs and  
13 Relations Committee is we need to get the Fact  
14 Sheet up on the website. And I was checking,  
15 and it's not there yet, so that's something  
16 that should be forthcoming, so that people who  
17 have called in, or who are calling in and want  
18 to see the Fact Sheet that we've referred to  
19 several times today can easily access it, and  
20 then as interested peruse the rest of the  
21 report. But under panel documents, that  
22 should, and probably will be there very soon.

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1 CHAIR BARROS-BAILEY: Okay. And I  
2 know that we have email addresses, I think,  
3 for all the people who have been listening in  
4 since the beginning, so that's easily -- we  
5 could disseminate that easily, as well.  
6 Abigail.

7 MEMBER PANTER: Just regarding the  
8 Fact Sheets, I think it would be very useful  
9 to have an organized rollout of them, and I'm  
10 not sure if that's in the works right now, but  
11 perhaps when we get all of the ideas that we  
12 really think about how they should be  
13 sequenced, because the first one really feels  
14 like a first one, but the second might feel  
15 like a second, and maybe there's an order to  
16 presenting this information.

17 CHAIR BARROS-BAILEY: When you look  
18 at the panel roadmap, if you look down to the  
19 communications, number three and four, in  
20 terms of plans for developing outreach plan,  
21 including presentations, meeting with  
22 stakeholders, a lot of that, I think that's

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1 one of the things that maybe the  
2 administrative team could work with Nancy on  
3 in terms of helping to develop that, so it's  
4 kind of an orchestrated, organized, rational  
5 way to present things, so it's orderly. Mark?

6 MEMBER WILSON: Well, another thing  
7 that would be useful looking at some of the  
8 URLs in here, is I very much appreciate the  
9 idea that we need to have a well-organized,  
10 and accessible website. So, I think it would  
11 be useful, rather than pointing people to just  
12 the home page, but to put in URLs to specific  
13 points would be useful. I think it would even  
14 be neat, if possible, to provide URLs to  
15 various points within the report, so that we  
16 very carefully link the Fact Sheets to the  
17 more detailed document in a way that makes it  
18 easy for people. And, especially in an  
19 electronic form, you pull this up, and this is  
20 kind of a little cheat sheet to the report,  
21 and as they click on various topics, there's a  
22 URL to that particular point in the larger

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1 document. Just an idea.

2 MEMBER SCHRETLEN: And hyperlinks  
3 within, Fact Sheets to other Fact Sheets.

4 CHAIR BARROS-BAILEY: Yes, as  
5 things link up. Yes, absolutely.

6 MEMBER SCHRETLEN: Yes, because  
7 that way people can see, I'm reading this Fact  
8 Sheet, and it refers to this, and then you go  
9 to that Fact Sheet. Because I think for a lot  
10 of people, opening a 700-page document is just  
11 not something they're going to do.

12 MEMBER KARMAN: So, if we keep this  
13 up, we'll have 750 Fact Sheets. Is that it?

14 (Laughter.)

15 MEMBER KARMAN: Or 750 links. No,  
16 I'm kidding.

17 CHAIR BARROS-BAILEY: Okay. I know  
18 that we started with User Needs and Relations.  
19 We went to Research, and we ended up with  
20 User Needs and Relations, but I wanted to  
21 maybe bring both of the Subcommittees up to  
22 see if there's anything else the panel wants

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1 to bring in to either Subcommittee in terms of  
2 questions for Nancy or Mark. Okay. Great.

3 MEMBER FRASER: One question.

4 CHAIR BARROS-BAILEY: Bob.

5 MEMBER FRASER: Are we going to  
6 discuss the nomenclature in relation to the  
7 Occupational Information System in terms of  
8 something different, or a Disability  
9 Occupational Information System, or something  
10 like that?

11 CHAIR BARROS-BAILEY: I think  
12 that's a great question, and it's something  
13 that I think has been very helpful in terms of  
14 a point of awareness for this group. When at  
15 our second meeting we realized that there was  
16 a nomenclature problem, that awareness  
17 advanced us, because when somebody was saying  
18 something and there was a disconnect, we could  
19 second -- we could question is it that they're  
20 saying something I disagree with, or is that  
21 they're saying something different? So, I  
22 think that awareness has helped us. And I

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1 don't know if there's always that connect  
2 beyond us to people who are reading Fact  
3 Sheets, or reading our report, or listening to  
4 us when we present, so one of the attempts  
5 that we tried to make in terms of bridging  
6 that was the glossaries for the report, and  
7 then the Subcommittee reports. We've talked  
8 about taking those glossaries and making them  
9 into a general glossary, that we add to as we  
10 go through this process to help develop a  
11 common language to make things very distinct  
12 and very clear on how we're doing that.

13           And I was kind of playing around  
14 with some things a few weeks ago, and I  
15 subscribe to these "Words of the Day" through  
16 NetLingo, which is push marketing. Once a day  
17 I get what does this word mean in this format.

18           And, for me, it's just kind of amusing to see  
19 how people in the industry talk, an industry  
20 that has consumed a lot of our lives in terms  
21 of technology, but the concept is that they,  
22 obviously, have a glossary that they are going

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1 from, and they're pushing that information out  
2 on a daily basis. And they're training  
3 through that very small bit of information.  
4 It's a very easy system to set up, so if we  
5 develop a glossary that we already have the  
6 foundation information for, we could do  
7 anything we want with it. It could be a  
8 static document on the website. It could be  
9 attached to anything we do, and if later we  
10 want to do anything else with it, we already  
11 have the foundation from it. So, I think that  
12 might be a start, but I think that is a very  
13 important comment, and question. Shanan?

14 MEMBER GIBSON: I can't help but  
15 follow-up on that, because Bob and I have had  
16 that discussion, and Mark Wilson has brought  
17 this up numerous times. And it's been brought  
18 up numerous times in other venues among panel  
19 members, both informally, and formally. But I  
20 do think it's very important for everyone who  
21 hears us, either calling in, or reads our  
22 documentation, to understand our purpose,

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1 which is to develop a Disability Occupation  
2 Information System. And we, like any other  
3 group, who are comfortable with our own  
4 shorthand fall in the habit of just calling it  
5 the OIS, and it sounds like it's this all-  
6 encompassing, we're taking over the world. So,  
7 it's very important that we continue, and  
8 maybe that is our own shortcut is doing us an  
9 injustice. And I think what Bob might have  
10 been alluding to is we really want to make an  
11 effort to make certain people understand that  
12 what we want to create, what we've recommended  
13 be created is a Disability Occupational  
14 Information System that meets the needs of  
15 SSA. It has a distinct purpose.

16 CHAIR BARROS-BAILEY: And I think  
17 that's a really important point, and I try to  
18 make it that the difference between the O\*NET  
19 and the Disability Occupational Information  
20 System is, essentially, that the O\*NET was  
21 being created by the DOL for a lot of users,  
22 not for DOL, but for a lot of users. The

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1 purpose there is very different than this one.

2 This one is being created by SSA for SSA, for  
3 disability within SSA. The purposes are very  
4 different, and because the purposes are very  
5 different, you have to look at it as something  
6 very different.

7 Bob was teasing me the other day  
8 that he wanted to listen to my construction  
9 oriented examples, but last time I used a  
10 hammer. I mean, a hammer is very precise in  
11 terms of trying to nail in a nail, and a dowel  
12 wouldn't work. A dowel is -- not a dowel,  
13 excuse me, a trowel. They're both tools. A  
14 trowel is developmental. What do we do with a  
15 trowel? We are creating something. It's a  
16 starting point to building something. So, for  
17 me, when I look at those construction  
18 metaphors, this is -- we're looking at  
19 something that has to be very precise, so the  
20 design aspects of it are very different in  
21 terms of a hammer nailing in the nail, as  
22 opposed to something that's a lot more

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1 developmental, which is more the orientation  
2 of the O\*NET. They're two different things.  
3 Deb.

4 MEMBER LECHNER: I want to play a  
5 little bit of a devil's advocate at this  
6 point, at the risk of being the lone person  
7 out on this subject. But I really think that  
8 this OIS will be used to a broader extent  
9 than merely disability, particularly in the  
10 world of Worker's Compensation, and  
11 rehabilitation. So, I don't know what risks  
12 do we run there? And those systems need just  
13 as much precision as the disability, so are we  
14 really limiting this in a way that it doesn't  
15 need to be limited, and will that create some  
16 problems with other entities that need -- that  
17 cannot use the O\*NET for their purposes. And  
18 are there some medical/legal issues for a  
19 system that's developed only for disability?

20 CHAIR BARROS-BAILEY: And I don't  
21 think you're alone out there on that tangent,  
22 because it is -- work comp is disability.

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1 Whether work comp is dealing with the forensic  
2 end of work comp, or it's dealing with the  
3 rehab end of work comp, it's disability, so I  
4 don't think anybody -- I mean, you and I are  
5 one of the founders of the IOTF, you know, Tom  
6 was on there, Sylvia was on there, we were all  
7 on there because the issue was Disability and  
8 Occupational Information. So, it's described  
9 in our report to the Commissioner. There's a  
10 couple of little comments in there in terms of  
11 acknowledgment that because it's a Disability  
12 Occupational Information System, there are  
13 other systems that, obviously, may need it,  
14 may use it, but that's not the purpose,  
15 specifically, with what we're doing here with  
16 the panel. Sylvia.

17 MEMBER KARMAN: Deborah, maybe what  
18 I'm hearing you say is -- are you making a  
19 distinction between what we have in the  
20 charter with regard to the type of information  
21 that we're -- that Social Security is looking  
22 to develop for its disability programs versus

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1 the nomenclature, the types of terminology and  
2 language that we use to describe what we're  
3 doing? Is that what you're saying? Are you -  
4 - in other words, calling it a Disability  
5 Occupational Information System might not  
6 fully describe its use, even though the Social  
7 Security Administration is intent on  
8 developing an Occupational Information System  
9 for SSA's disability programs, which also  
10 would be useful to other people. Is that what  
11 you're -

12 MEMBER LECHNER: Right. And I just  
13 think that while within this group of  
14 individuals we might see disability and the  
15 work comp falling in that greater context. I  
16 can guarantee you the work comp world doesn't  
17 view it that way. The insurers, and you may  
18 want to speak to that, Tom, but I don't think  
19 the insurers, the work comp insurers view  
20 themselves as a disability insured's policy.  
21 So, I just -- and I think that there are so  
22 many flaws with O\*NET that this system will

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1 get -- end up getting used for things, and  
2 purposes that we don't really see, so I am in  
3 favor of a broader terminology, a broader  
4 title for it as an Occupational Information  
5 System. So, I guess I disagree with other  
6 members of the panel on that particular issue.

7 CHAIR BARROS-BAILEY: Alan.

8 MEMBER HUNT: I would respectfully  
9 disagree, Deborah, because the insurers are  
10 paying for disability. In some cases it's  
11 impairment, but they're not paying for lack of  
12 disability. I mean, I understand what you're  
13 saying, that we hope the use is going to be  
14 broader than the Social Security  
15 Administration, but I think they would -- the  
16 Worker's Comp world would be very comfortable  
17 using the word "disability." That's the  
18 business they're in when they're paying  
19 claims.

20 CHAIR BARROS-BAILEY: And back in  
21 January, Mark and I talked about how we had on  
22 our own met with the National Academies of

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1 Science, and that was one of my approaches to  
2 Chapter 8, was that it was entitled,  
3 "Disability Determination," and the only  
4 player in that chapter was the Social Security  
5 Administration, so it left out the rest of the  
6 disability community in terms of disability  
7 management, in terms of the private insurers  
8 who also have disability determination systems  
9 that deal with occupational information within  
10 that. And within my presentation to the  
11 National Academies, I did address those other  
12 systems, but that's separate from what we're  
13 doing here. Mark.

14 MEMBER WILSON: Yes, to me, the  
15 important thing in terms of our charge is to  
16 be clear exactly what we're doing, and so I  
17 think this nomenclature discussion is  
18 important. And the reason that I and others  
19 said early on we need to start calling this a  
20 Disability Occupational Information System, so  
21 that we don't confuse people as to what its  
22 intent is. Now, I think Deborah makes an

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1 important point, that we certainly need to be  
2 mindful of the fact that people outside Social  
3 Security Administration are very likely going  
4 to want to use this. And all things being  
5 equal, if we can achieve the objectives of  
6 Social Security Administration, and create a  
7 system that other people find useful, that's  
8 great. But I still think that we have to  
9 focus like a laser beam on what our task is,  
10 and what we're doing. And by not being  
11 specific in the naming of what it is we're  
12 going to do, I think will conceivably create  
13 either confusion, or a sense in some people's  
14 eyes that we've exceeded our mandate, that  
15 we're -- we asked you for a disability system,  
16 and you're doing one for Worker's Comp, and  
17 all that. So, that's why I, from very early  
18 on, said that I think it would be useful to  
19 refer to what we're doing as providing advice  
20 on the design and development of a Disability  
21 Occupational Information System.

22 MEMBER KARMAN: It almost feels to

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1 me like the nomenclature maybe is specified in  
2 terms of that it's for forensic purposes, and  
3 maybe that's -- I'm not getting into whether  
4 it should -- we should have forensic in the  
5 name, or not, but perhaps that concept might  
6 be more getting at the concern that Deborah  
7 Lechner is having with regard to the message  
8 that it sends around. We certainly don't want  
9 to be sending out a message, like you've  
10 pointed out, Mark, that we're exceeding our  
11 charge, or that we're in any way trying to  
12 compete with other systems that are already  
13 existing for completely different purposes,  
14 much broader purposes than what we have. But  
15 I am sensitive to what Deborah Lechner has  
16 mentioned, because we do get that question  
17 from time to time from people, when we present  
18 to other groups. Mary and I even had a whole  
19 slide about how the information that SSA needs  
20 can be seen as a subset of what people in the  
21 rehabilitation community, vocational  
22 rehabilitation community would need. So, I do

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1 appreciate what both of you are saying.

2 CHAIR BARROS-BAILEY: Nancy.

3 MEMBER SHOR: I would just comment  
4 that I think using disability up front, that  
5 this is a Disability OIS, suggests that  
6 there's something about it that has gone into  
7 the data collection, that has something to do  
8 with people and disabilities, and I don't  
9 think that's true. I think the OIS portion is  
10 just the four corners of the document. Here's  
11 the description of the job. Here's the  
12 description of what a worker needs to be able  
13 to do the job. So, I would be -- I think it  
14 would be clearer, something along the lines  
15 you were suggesting, Sylvia, which is that  
16 it's an OIS for forensic purpose. To separate  
17 out the data collection, I mean, how you're  
18 going to design the instruments, all of that  
19 is going to be just to get the accurate  
20 descriptions of what goes on in that  
21 workplace. And then what you're going to do  
22 with the data, to use it within disability

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1 evaluations.

2 I think that for general usage, a  
3 Disability OIS immediately raising a question,  
4 well, how would that be different from an OIS.

5 So, I'd be happy to put the usage part later  
6 in the title.

7 CHAIR BARROS-BAILEY: Mark.

8 MEMBER WILSON: I think we've got  
9 another Fact Sheet here on what is the  
10 difference, because I think it's important to  
11 say up front this is a Disability  
12 Occupational, and here is what the difference  
13 is.

14 MEMBER KARMAN: I think that's a  
15 great idea. And I am actually really glad  
16 that we're having this discussion, because  
17 that is a point that I know Mary and I have  
18 tried to make salient when we're presenting to  
19 a number of organizations, that we're in the -  
20 - we, Social Security, are in the process of  
21 developing, doing the research and development  
22 to gather data about occupations that -- those

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1 data are critical to disability evaluation, to  
2 our adjudicative process, but there's nothing  
3 set out initially in terms of the  
4 instrumentation, or the -- there's not weighed  
5 about those data that are disability oriented.

6 In other words, this really is about the  
7 requirements of work that are of most  
8 relevance to assessing disability. And I  
9 think that that's the more objective aspect of  
10 it, if I'm hearing you correctly, Nancy. That  
11 we want to be very clear about that. And I'm  
12 sure everyone on our panel agrees with that,  
13 so maybe that's just a challenge we should  
14 take up for seeing how we might go about (a)  
15 doing a Fact Sheet that can explain that; and  
16 (b) coming up with nomenclature.

17 CHAIR BARROS-BAILEY: And I think  
18 what I'm hearing in terms of a general concept  
19 is when we use OIS, people see it as a  
20 competing format to other systems that exist,  
21 because they do not understand the  
22 specificity, and that the purpose is

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1 completely different. As I mentioned, one is  
2 more developmental, the other one has to have  
3 precision, because it's forensic. And along  
4 with forensic, it has to have the legal  
5 defensibility. I mean, that is part of  
6 specifically the Occupational Information  
7 needs that have been outlined in our report,  
8 so the design of such a system is completely  
9 different than the design of a system that's  
10 more developmental, and a starting point. And  
11 if people don't understand those distinctions,  
12 then they make and leap to all sorts of  
13 conclusions that are inaccurate in terms of  
14 what the purpose and the need is. So, I think  
15 that's a really fine point.

16 I know we all understand it, and we  
17 could talk about it, and understand what we're  
18 talking about. It's making that leap, again,  
19 in terms of communicating that to the public,  
20 so other people could understand it the way we  
21 do. So, great discussion.

22 Any other thoughts? Sylvia.

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1                   MEMBER KARMAN: This is unrelated,  
2 but it -- Deborah, our DFO, noted that we  
3 wanted to mention that the report online at  
4 our website is now available in sections, so  
5 individuals visiting the website can actually  
6 click on individual appendices, as well as the  
7 summary report, which includes our  
8 recommendations, the panel's recommendations.  
9 Also, there is -- you can also open a PDF of  
10 the entire 750 pages, if you so desire. So,  
11 hopefully, that will be more useful, or more  
12 accessible to people.

13                   CHAIR BARROS-BAILEY: And I think  
14 we did that because in January it became very  
15 clear that people were looking at the report  
16 as a whole report, and didn't understand that  
17 the Subcommittee reports were finalized before  
18 we voted on the final recommendations. So,  
19 even on the home page, the link that you'll  
20 find there in terms of feedback is to the main  
21 report, which is the 61 pages or so, and then  
22 if you want to look at the supplemental

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1 information, which are all the Subcommittee  
2 reports and the appendices, you actually have  
3 to go to the web page that has those outlined  
4 there. Mark.

5 MEMBER WILSON: Is the main report  
6 available in HTML? I mean, is that -- or is  
7 it all PDF?

8 MEMBER KARMAN: PDF.

9 MEMBER WILSON: I think at least  
10 for the main report, it would be great to put  
11 that up there in HTML, and have some linkages  
12 between the Fact Sheets and that. I agree  
13 that it would be going too far with the  
14 Subcommittee reports.

15 MEMBER KARMAN: We'll take a look  
16 at that. I know we have some, not some, we do  
17 have very specific issues with regard to 508  
18 compliance, so that things can be available to  
19 individuals who have, for example, visual  
20 impairments. So, to the extent that HTML  
21 could be supported to make it 508 compliant,  
22 we can pursue that.

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1 CHAIR BARROS-BAILEY: Okay. Any  
2 other comments? Well, we are about lunch  
3 time. We're a little early, so let's go ahead  
4 and break for lunch, and come back at 1:00.  
5 Okay. Thank you.

6 (Whereupon, the proceedings went  
7 off the record at 12:05:46 p.m., and went back  
8 on the record at 2:05:29 p.m.)

9 CHAIR BARROS-BAILEY: Good  
10 afternoon, everybody. Welcome back.

11 Before we broke, I had indicated  
12 that we would be having some discussion this  
13 afternoon because there was some questions in  
14 the morning in terms of the different  
15 roundtables. So, what I'd like to do is maybe  
16 describe a little bit about what roundtables  
17 are, and how they work with the process that  
18 we are involved with. People hear us talking  
19 about Subcommittees. Subcommittees are  
20 committees made up of groups of individuals  
21 within the panel, and because of our structure  
22 as a panel, it doesn't provide us with the

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1 opportunity to bring people in from outside.  
2 Roundtables are -- give us an ability to  
3 address a specific topic, either that needs to  
4 be addressed in one shot, or needs to be maybe  
5 the start of a process to consider sequential,  
6 or a longer term subject. So, this morning  
7 when we talked about the roadmap, we  
8 identified three potential roundtables that  
9 we're looking at, holding that's not -- that  
10 we are limited just to those roundtables. It  
11 depends on the kind of information we  
12 anticipate we need to be able to provide the  
13 advice and recommendations that we have been  
14 asked to provide.

15 So, what I've asked are the  
16 individuals who could give us some information  
17 about the roundtables, and maybe what's  
18 anticipated, or the kind of input that we can  
19 have to maybe talk a little bit about it this  
20 afternoon. Deborah had something she wanted  
21 me to say about the roundtables, and I forgot.

22 Okay. Sorry about that.

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1 I want to open it up to maybe  
2 asking the Labor Market roundtable individual.  
3 That's what it was, the four-square document.  
4 Okay. We talked about the four-square  
5 document, and the four-square document is the  
6 document that kind of sets the parameters for  
7 the roundtable.

8 We are willing to share those with  
9 anybody who needs a copy of the four-square  
10 document that was used for transferable  
11 skills, the Work Experience Analysis  
12 Subcommittee, or the Mental Cognitive  
13 Subcommittee. Alan, you had asked about that,  
14 so we could get those to you.

15 We have asked you to maybe lead the  
16 process in terms of the labor market  
17 information roundtable. Maybe you could open  
18 it up to discussion in terms of some of your  
19 thoughts, and maybe some questions you might  
20 have of the panel members.

21 MEMBER HUNT: Well, I have a lot of  
22 questions, but let me just start by saying

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1 yes, we have talked about a roundtable on  
2 labor market issues, particularly, sampling  
3 plans as an addition. We probably need to  
4 think about how far along we're going to be at  
5 what point in time. And I confess that I  
6 haven't thought much about this, and was a  
7 little surprised, but let me tell you what I  
8 think. And I have not seen the four-square  
9 document, so I don't have that guidance  
10 either. But just from my general experience,  
11 it seems to me it would be extremely valuable  
12 and informative for us to hear the experience  
13 of some other people who are gathering  
14 occupational employment data. And, obviously,  
15 the Department of Labor is the main place  
16 where that occurs, both ETA and BLS. BLS has  
17 several programs that might be relevant.

18 I was just speculating after lunch  
19 about would it even be worth talking about  
20 people who gather things like safety and  
21 health data, and the connection there would be  
22 well, they use a state-federal partnership to

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1 do this. I have no idea if that's even  
2 feasible for Social Security, but at least  
3 it's another opening to think about. I mean,  
4 is there some connection here? And, of course,  
5 not trying to piggyback on, but with the  
6 state-federal voc rehab program in mind, they  
7 are, obviously, some issues.

8 So, what I would like to do at some  
9 point, and sooner rather than later, because  
10 our meeting in June is going to be kind of  
11 late, in my mind, to be inviting people to  
12 come to make presentations. An old mentor of  
13 mine said you can get anybody to do anything  
14 if it's far enough in the future, but once the  
15 day is coming, it's much more difficult to get  
16 agreement. So, I would hope that -- and we  
17 need to be informed by what develops tomorrow,  
18 as well. But I would hope that we could at  
19 least bring together people from Department of  
20 Labor, and from the Census Bureau, maybe from  
21 Military Manpower. That's unknown to me, but,  
22 certainly given that they have another

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1 Occupational Information System, and have  
2 certainly serious needs, both incoming and  
3 outgoing, they would be, I think, participants  
4 that would be important to have.

5 And what I would like to get some  
6 information about, both in terms of other  
7 agencies, and other entities that you might  
8 think might contribute something, but, also, a  
9 little bit of wisdom from the panel on who  
10 among users might be valuable to have at such  
11 a meeting. And given that we are showing that  
12 it's going to be completed by August, I mean,  
13 we're talking July and August in terms of when  
14 this is going to happen, so the more you can  
15 give me now, the better.

16 CHAIR BARROS-BAILEY: Any ideas in  
17 terms of participants?

18 MEMBER KARMAN: You know, it might  
19 be helpful for us to talk about what some of  
20 the questions might be. I am imagining that  
21 by -- I think that, to some extent, some of  
22 these roundtables may be one time events, some

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1 of them may be more than one time, so it may  
2 turn out that we have an initial roundtable on  
3 labor market information issues, as well as  
4 what kinds of sampling questions SSA may be  
5 having at that stage of the game. And I'm  
6 thinking about our first design study, so we  
7 may want to be -- have our four-square  
8 document, in other words, our boundary of  
9 things that we're looking to accomplish at  
10 that meeting really be very focused toward  
11 that end. And then that might help us  
12 determine what people we should be inviting,  
13 and who might be -- what users might be  
14 helpful to be there, if any. I mean, maybe  
15 this is an issue of you want the experts in  
16 the room with us, or expert users, as well.

17 So, I know, for example, we've  
18 talked a little bit about, at least among our  
19 staff about knowing that we will have to find  
20 the occupations. And, certainly, Alan and I  
21 have talked about meeting with Bureau of Labor  
22 Statistics to find out who we need to work

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1 with to identify employers in certain locals  
2 based on the SOC codes that the government  
3 currently collects information about, and what  
4 we can do beyond that, since we're going to  
5 need to have more detailed information about  
6 work than what is currently reflected at the  
7 SOC level. So, I know of some initial things  
8 that we're going to be struggling with we're  
9 going to need some help with. So, I think  
10 that may be useful, for example, to find out  
11 from some of these experts when they collect  
12 data, like for the OES, or even CPS. If  
13 they're asking the individuals filling out the  
14 surveys when they are indicating the types of  
15 work, we're wondering whether or not that gets  
16 coded after it arrives at BLS, or Census  
17 Bureau, which means that if there's raw data  
18 that we could, that might be more helpful to  
19 us than something that's already been coded at  
20 the SOC level, so there are some things like  
21 that that might be useful for us to  
22 investigate.

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1 CHAIR BARROS-BAILEY: My thought  
2 is, from reviewing some things recently in  
3 terms of the role of trade organizations, I  
4 know that's been used by the DOL in terms of  
5 same of the sampling. That might be helpful.  
6 Alan.

7 MEMBER HUNT: Well, let me just say  
8 that, obviously, I will take some guidance  
9 from the Research Subcommittee, since we meet  
10 by telephone every two weeks, and it will be a  
11 chance to ventilate some of this. And I  
12 apologize for not having gotten farther along  
13 in my thinking, but that's the way it is.

14 CHAIR BARROS-BAILEY: That's okay.  
15 I put you on the spot, so I appreciate you  
16 taking the time to do this right now. Sylvia,  
17 you had something to add?

18 MEMBER KARMAN: Yes. I just wanted  
19 to mention, we have also been informed about a  
20 National Business Registry, and it's something  
21 that our staff has been trying to nail down.  
22 And I don't know if anybody -- Alan, if you're

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1 familiar with that, or if anybody else is  
2 familiar with that, but we're thinking that  
3 that might be another source of information  
4 about entities that we might want to visit, or  
5 to set up a way to visit, so that we can do  
6 job analyses as we move along. So, there's  
7 just a lot of questions, and I, too, apologize  
8 to Alan, because we really haven't had much  
9 opportunity to talk about this.

10 CHAIR BARROS-BAILEY: NAICS,  
11 another potential source, so there are a  
12 variety of them out there that are collecting  
13 data, representing it in different forms.  
14 Okay. Any other thoughts, or questions?  
15 Okay. Thank you, Alan. Okay.

16 We also have the linkages  
17 roundtable. Sylvia, do you want to say  
18 something about that?

19 MEMBER KARMAN: Yes. So, we're  
20 going to talk a little bit about roundtables  
21 today. And I know a number of you may have  
22 already been thinking about some of the

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1 roundtables, because they were issues that  
2 came up when we were voting for final  
3 recommendations in September. But with regard  
4 to the linkages one, certainly, as we -- our  
5 staff is moving forward with developing the  
6 person side elements that are of most interest  
7 to the Agency that we would want to collect  
8 occupational information about, and then  
9 developing a prototype person side instrument,  
10 and then something on the work side, we're  
11 going to get into measurement issues. And, of  
12 course, that gets to linkage concerns, so I  
13 have been talking with Dave Schretlen about  
14 that, and I certainly think it's something  
15 that -- we have the Research Subcommittee sort  
16 of set aside to take that up, but I think,  
17 certainly, to the extent that the physical  
18 demands and mental demands Subcommittees have  
19 a focus there, I think that that would be a  
20 very valuable thing to bring into that. And  
21 we may want to parse that out in terms of  
22 roundtables, because one of the things I've

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1 mentioned to David is that we're not  
2 anticipating that one roundtable, or a one-day  
3 meeting to talk about some of these issues is,  
4 necessarily, all that the panel might do with  
5 regard to this, this being linkages, or this  
6 being measurement issues. Certainly, the  
7 staff may also be -- will certainly need to be  
8 taking up some other kinds of investigation,  
9 as well. But it does offer us an opportunity  
10 to get started.

11 MEMBER SCHRETLEN: So, I think of  
12 this, the linkage roundtable, or the linkage  
13 part of what -- of the advising that we're  
14 going to be doing to SSA are being critically  
15 important to this entire project, because as  
16 we've talked about many, many times,  
17 ultimately, it all comes down to an N of one  
18 analysis of matching an individual's residual  
19 capacities to the demands of various jobs.  
20 So, it has always seemed to me that this is  
21 kind of -- goes to the very heart of what we  
22 will be advising Social Security about. And

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1 yesterday, Mark, toward the end of his  
2 presentation showed these sort of profiles of  
3 worker character -- or job demand  
4 characteristics that you could arrange  
5 visually as sort of a graph, or you could turn  
6 the axis on its side and represent among  
7 different job demands what each particular  
8 occupation's loading is on that in terms of  
9 strength, or endurance, or complexity, or any  
10 number of characteristics. So, ultimately, I  
11 think they way I've always sort of envisioned  
12 this is the OIS, or Disability OIS is going  
13 to, ultimately, lead to a series of  
14 occupational descriptions that, essentially,  
15 amount to a profile of the demands, the  
16 various demands of a worker that each  
17 occupation has. And, ultimately, we're going  
18 to need to compare that to the characteristics  
19 of the workers, of the applicants. So, it  
20 seems to me that it's not going to be one  
21 roundtable, but a series of roundtables. And  
22 this is going to be, I think, some of the

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1 hardest work that Social Security is going to  
2 have to do. And I think that there are people  
3 with statistical expertise in the area of  
4 pattern matching, and looking at profiles,  
5 sort of statistical approaches, and we can  
6 bring in experts with a variety of  
7 backgrounds.

8 One of the concerns, I think, that,  
9 in my mind, we punted down the road when we,  
10 and by we, I mean the Mental Cognitive  
11 Subcommittee, made recommendations to the  
12 panel as a whole. And the panel as a whole,  
13 with modification, adopted those for SSA, is  
14 that we really were talking about dimensions  
15 of Mental Cognitive function. We never talked  
16 about how those things are going to be  
17 measured, really. I mean, we sort of -- we  
18 discussed option, we noted, if you will, very  
19 briefly, options, but I think that there's a  
20 lot of hard work to be done in figuring out  
21 whether the kinds of abilities that we  
22 identified, and that we've suggested that

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1 Social Security consider are things that can  
2 be rated accurately, and whether they can --  
3 are valid predictors of a person's ability to  
4 perform in a job, or actually on a test of the  
5 ability that we're trying to rate. So, I  
6 think that, in the end, there's going to be a  
7 fair amount of research that needs to be done,  
8 as well. And I think -- I suspect that a  
9 roundtable, or two, or three on this topic  
10 will make it clear precisely what kinds of  
11 instrumental kinds of research need to be done  
12 before Social Security can really feasibly  
13 develop a person side instrument to take into  
14 the field for investigation.

15 CHAIR BARROS-BAILEY: So, in terms  
16 of the questions, maybe some of the thoughts  
17 or the feedback that you might be thinking, or  
18 wanting to have some input from the panel, any  
19 specific areas in terms of the starting point?  
20 Is it just asking the question, is that what  
21 you're -

22 MEMBER SCHRETLEN: I think that's

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1 it really -- it's exactly right that every  
2 single Subcommittee is represented in this.  
3 It has to be. This is going to be a joint  
4 effort, and I think it's just for us to begin  
5 thinking about well, what is the expertise  
6 that we are going to need to try and figure  
7 out how we match the person side  
8 characteristics with the job side demands.  
9 And I don't think this is going to be -- this  
10 is going to require some heavy lifting, and I  
11 think we all -- I, certainly, am very open to  
12 suggestions that anyone might have about what  
13 kind of expertise could guide us in this, in  
14 the recommendations we make to Social  
15 Security.

16 CHAIR BARROS-BAILEY: And match it  
17 better, because there are matches going on now  
18 that I think we all know that they could be  
19 done better. Nancy.

20 MEMBER SHOR: I just had a question  
21 about how roundtables are constructed. Can  
22 individuals apply, volunteer, or is it

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1 strictly by whom you pick? If there's someone  
2 who would like to participate, can they  
3 indicate that?

4 MEMBER KARMAN: You know, I don't  
5 know. I don't know that there's a roundtable  
6 like regulation or protocol, but at least --  
7 let me just say, the way we handled it with  
8 the last two, the Chairs of the Committee in  
9 -- the subject Committee was taking the lead  
10 of recommending the type of expertise that  
11 might inform the discussion, given the four-  
12 square document, given the boundaries of what  
13 we were trying to look at for that day, or  
14 that series of questions. And those of us in  
15 that Subcommittee met, we discussed it, we  
16 tossed around well, what about this area of  
17 expertise, what about making sure that's  
18 represented, should it be a practitioner and a  
19 scientist, and dah, dah, dah, dah, and this  
20 kind of thing. So, I think we're pretty open  
21 to hearing what a variety of people might have  
22 in mind for this roundtable, or others. And

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1 there may be some roundtables where maybe we'd  
2 want to have people volunteering. I just don't  
3 know how we would vet that, so, I guess, I'm  
4 open to hearing ideas about it. Keeping in  
5 mind that a roundtable you would want to have  
6 it small enough to be manageable.

7 MEMBER SCHRETLEN: Yes. I can just  
8 share a little bit of our experience. You may  
9 recall that for the roundtable that we did, it  
10 was -- we were under enormous time pressure,  
11 so we actually had suggested -- we had people  
12 suggested to us by a number of panelists, both  
13 within the Mental Cognitive Subcommittee, and  
14 outside the Mental Cognitive Subcommittee, and  
15 we contacted virtually everybody who was  
16 identified and suggested to us, and many  
17 people were unavailable. It was all on short  
18 notice, and we were asking people to do a fair  
19 amount of work, and some people just said I  
20 don't think I have time for that. But we  
21 tried to have very broad representation. In  
22 terms of research community, we had people

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1 from a DDS, or DDA rather, from Baltimore, so  
2 we had practitioners and academics, both.

3 I would underscore that it's useful  
4 to keep it on the smallish side, to be  
5 strategic in who you choose, because the more  
6 people you have, the more difficult it becomes  
7 to coordinate. So, just based on that, I  
8 would encourage whoever ultimately puts  
9 together these roundtables to keep it on the  
10 smallish side.

11 CHAIR BARROS-BAILEY: I just wanted  
12 to add, too, some of it came from the  
13 literature review, so a lot of people who had  
14 been publishing in these areas, just knowing  
15 that a lot of times in terms of what's  
16 happening currently doesn't get into the  
17 literature sometimes two to five years later,  
18 so looking at the literature and trying to  
19 come forward to seeing who can be at the table  
20 that could bring the most current information.

21 Okay. Any other thoughts or input into the  
22 linkages roundtable? I think everybody knows

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1 that is the ultimate tire that needs to meet  
2 the road right there, and the ultimate test.  
3 So, I do think you're right, that it's  
4 probably the start of a process. Sylvia.

5 MEMBER KARMAN: I just wanted to  
6 mention, also, especially for the newer  
7 members on the panel, we do staff the  
8 roundtable meetings. So, in other words, our  
9 staff will staff that, and will help develop  
10 the materials, will help you and others that  
11 are from the panel, who are working on that  
12 particular roundtable contacting individuals,  
13 pulling together the what we keep calling the  
14 four-square document. By the time we send  
15 this to you, Alan, you'll be like this is no  
16 big deal. We're like working this up to be  
17 this really amazing document, and it's like  
18 it's just -- it just explains what we're going  
19 to cover in our roundtable. So, there is  
20 support. There is -- in other words, you will  
21 have programmatic support for -- staff support  
22 to do this. And we haven't had an

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1 opportunity, at least in -- I mean, I should  
2 really leave this for Mark to talk about, but  
3 at least within the Subcommittee that I'm on,  
4 and we haven't had a chance to talk about how  
5 we're going to conduct roundtables. We have  
6 broached the subject of the NAS roundtable,  
7 but that's the extent of it, so that's  
8 probably why you're getting these responses,  
9 where people are not too sure yet exactly how  
10 that's going to work.

11 CHAIR BARROS-BAILEY: Well, it's  
12 because we've just transitioned. The last  
13 meeting we were in transition, at this point  
14 we have transitioned, and everything is just  
15 starting to kind of take off in terms of our  
16 involvement in some of these activities. So,  
17 that's where we are. That's a great segue,  
18 Sylvia, to Mark in terms of maybe talking  
19 about the NAS roundtable, and some thoughts in  
20 terms of that. And I'll turn it over to you.

21 MEMBER WILSON: As everybody knows,  
22 we're going to have a presentation tomorrow

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1 from the NAS, and the panel has a draft  
2 version of their report. And, of course, one  
3 of the reasons that we're interested in this  
4 is because of, I believe it's Chapter 8 in the  
5 NAS report, where they address disability  
6 determination issues. So, I think the primary  
7 question I have for other panel members is --  
8 and I think Nancy's question is very  
9 appropriate here in terms of the National  
10 Academies is not an inconsequential group of  
11 people. What they say about various issues,  
12 research policy, or otherwise, is something  
13 that needs to be paid attention to. But, at  
14 the same time, I think it's important to  
15 insure that the panel understands completely  
16 what the recommendation imply for us, and  
17 perhaps don't imply for us. Most notably, as  
18 we have repeatedly experienced, even use of  
19 the exact same terms may, in fact, mean  
20 different things to different groups of  
21 people. So, one doesn't want to get  
22 particularly concerned until there have been

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1 discussions. And I'll digress back for a  
2 moment to another activity of the Research  
3 Committee with regard to advisement of Social  
4 Security on OIS Study I Design, where it --  
5 oftentimes, I found that more casual informal  
6 conversations will oftentimes lead to better  
7 understanding than roundtables, and formal  
8 meetings, and exchanging of documents, and  
9 things of that sort that can, oftentimes, cut  
10 to the chase quicker. So, don't want to make  
11 more of it than what it is, but I can say that  
12 in terms of my own thoughts as to who might be  
13 participants in a roundtable, and then I would  
14 open it up to others, is certainly some  
15 members of the National Academies panel that  
16 participated in writing this report.

17 I think because the National  
18 Academies only gets around to looking at work  
19 analysis once every 30 years, it might be good  
20 to go back and invite some people who are  
21 still around from the National Academies  
22 report that addressed O\*NET, and some of the

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1 -- DOT, sorry, as well as the current National  
2 Academies study that looks at O\*NET.

3           And then the third group which  
4 speaks to the -- I think it was you, Mary, who  
5 said identifying authors based on literature  
6 search, and people who are currently active,  
7 and there are a few of those. But those were  
8 the sort of initial ideas that I think we  
9 have. I'm certainly, as David said, very much  
10 open to suggestions, and ideas as to how do  
11 this.

12           I think this particular roundtable  
13 is a little different in terms of, we're  
14 dealing with a fairly substantive scientific  
15 agency here, so there may be some extra  
16 protocols that we need to follow, and things  
17 of that sort. I'm not sure, but I'm certainly  
18 open to guidance.

19           CHAIR BARROS-BAILEY: Tom.

20           MEMBER HARDY: Just a quick  
21 question. The purpose and goal of this  
22 roundtable, I think, would drive some of that.

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1       And I'd like clarification on the purpose and  
2       goal.

3                   CHAIR BARROS-BAILEY:    I think as  
4       Mark identified it, once every 30 years or so  
5       that a huge independent group looks at an  
6       existing OIS, and gives some feedback in terms  
7       of critique of certain areas that are pluses  
8       and minuses in terms of that system.    So, I  
9       think there's a lot of lessons that are  
10      learned from not only the Miller Study from  
11      1980 that reviewed the DOT, which is currently  
12      being used in the SSA process, and one of the  
13      reasons that we are here around this table to  
14      try to come up with a system --  
15      recommendations for a system to replace it,  
16      but, also, the development of its replacement  
17      under the DOL scenario in terms of the O\*NET.  
18      So, what are the lessons learned from both of  
19      those, the DOT and the O\*NET that lend to our  
20      advice and recommendations, to the things that  
21      have been identified in the letter by the  
22      Commissioner, anything else that's coming down

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1 the pike that we are asked to provide advice  
2 and recommendations on. There might be things  
3 that are common between both reports in the 30  
4 years that are problematic as a sampling, I'm  
5 thinking. And they used field job analysts in  
6 DOT, they're not using it with the O\*NET, so  
7 they allude to it in the NAS report, data  
8 collection. You know, those kinds of things,  
9 so what are the lessons learned, what are the  
10 take-aways that maybe are not answered in  
11 these reports? But, as you know, there are a  
12 lot of things that happen that we learn that  
13 don't end up on the piece of paper that  
14 somebody might be able to provide us  
15 information about, so I think that's part of  
16 it. Tom.

17 MEMBER HARDY: Are you looking for  
18 a written document coming out of this? I'm  
19 just curious.

20 CHAIR BARROS-BAILEY: I don't know  
21 anything different than any other roundtable.  
22 Are you saying from the NAS roundtable? I

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1 don't think that it would be anything  
2 different than any other roundtable.

3 MEMBER HARDY: A summary.

4 CHAIR BARROS-BAILEY: Yes.

5 MEMBER HARDY: Okay.

6 MEMBER KARMAN: I think earlier  
7 when I was going over the project areas that  
8 we're covering, I think we made some mention  
9 of the connection between what we could learn  
10 from the NAS. Well, right now it's the pre-  
11 publication report, but when they do publish  
12 their final one, I think it would be very  
13 helpful for Social Security to have - I think  
14 Mark mentioned this, as well - a real sense of  
15 what the implications are of all of these  
16 recommendations to the development of an OIS  
17 for SSA's purposes, because we will be subject  
18 to the same laws and statistics, and psycho-  
19 metrics, and sampling, and everything else  
20 that everyone else is. And, to some degree,  
21 where are we different, because we are looking  
22 at data at a more granular level, we call

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1 ergometric, as opposed to econometric. Is  
2 there a distinction there? So, I think that's  
3 part of it.

4 Now, Tom had asked about the  
5 document at the end, and I don't perceive it  
6 as we would need anything different from  
7 roundtable, but there's another issue about  
8 the document. Maybe that's what's -

9 CHAIR BARROS-BAILEY: Yes. So,  
10 when you mean document, that's why I was  
11 trying to clarify from you if it was from the  
12 roundtable. From the roundtable, I think  
13 it's a document that you would perceive coming  
14 out of like the TSA Subcommittee, anything  
15 like that. But if you remember, this morning  
16 when I had the slides up on the board, and I  
17 talked about the deliverables, those four  
18 point areas that the Commissioner has asked  
19 us. Right? One of those was any reports or  
20 documents that are out there that they've  
21 asked us to review, and the NAS is one of  
22 those. So, there will be a report coming to

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1 the OIDAP at some point in terms of the review  
2 of the whole thing, and what does it mean in  
3 terms of advice and recommendations that will  
4 be on any of those, including our annual  
5 report that will go to the Commissioner.

6 MEMBER HARDY: So, that final  
7 report, is that going to -- that's going to be  
8 -- that will take information from the  
9 roundtable, and then there will be other  
10 things that go into that report?

11 CHAIR BARROS-BAILEY: Yes.

12 MEMBER HARDY: You think it will be  
13 the summary.

14 CHAIR BARROS-BAILEY: Yes. It will  
15 be a variety of things.

16 MEMBER HARDY: So, it's a longer  
17 process.

18 CHAIR BARROS-BAILEY: Right. It's  
19 a point-specific focused report specific to  
20 each of those bullets, so one of those bullets  
21 being the NAS, one of them eventually being  
22 the field job analyst, one of them being the

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1 sampling, the other one being the linkages,  
2 and then annually a report of activities.

3 MEMBER KARMAN: I might point out  
4 that the only report that is actually -- that  
5 the Commissioner had requested in his letter  
6 to the panel chair that's due -- that has a  
7 due date was the summary. So, the others were  
8 left more open, so that the panel would be  
9 delivering them at the point at which SSA  
10 would be needing the information. So, that's  
11 not to say that that's, necessarily, due by  
12 September 30<sup>th</sup>, 2010, just in case anybody has  
13 a concern about that.

14 CHAIR BARROS-BAILEY: I think we're  
15 all very hypersensitive about deadlines after  
16 September 30<sup>th</sup> of last year, so yes, thank you  
17 for clarifying that. The only deadline we  
18 have is the annual report in terms of our  
19 activities in November, but everything else is  
20 as it is available, and as it comes. Any  
21 other thoughts about the NAS roundtable? Any  
22 other roundtables, or any other roundtables

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1 that we haven't talked about?

2 MEMBER FRASER: Just in terms of  
3 roundtables, if this -- thinking if the  
4 meeting is in Seattle, if there's people at  
5 the university in neuropsychology, or IO, or  
6 rehab medicine, not just thinking of the  
7 University of Washington, but Oregon Health  
8 Sciences, you know, it's a good opportunity to  
9 get them. And the thing about the northwest,  
10 people don't leave so much in the summer  
11 because it's a good place to be, so we can  
12 corral them with a little notice is the point.

13 CHAIR BARROS-BAILEY: Thanks, Bob.

14 MEMBER SCHRETLEN: I also wondered  
15 about like representatives of NADR, where  
16 there are people who are concerned about the N  
17 of 1 problem might be interested in  
18 participating in this, because they might have  
19 some insights about the usefulness of O\*NET.

20 CHAIR BARROS-BAILEY: So, more of a  
21 users roundtable.

22 MEMBER SCHRETLEN: Yes.

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1 CHAIR BARROS-BAILEY: One specific  
2 to users?

3 MEMBER SCHRETLEN: No, no, no, as  
4 participants. Users as participants at the  
5 NAS roundtable.

6 CHAIR BARROS-BAILEY: Okay. As  
7 part of the participants at some point.

8 MEMBER SCHRETLEN: Yes.

9 CHAIR BARROS-BAILEY: Yes. Okay.  
10 Thank you. Any other discussion at all about  
11 roundtables? Okay.

12 Then I think we are at a point of  
13 being able to have a public comment. We have  
14 one person signed up for public comment, and I  
15 would welcome Mr. John Reeves. John Reeves is  
16 with Reeves Associates, and we have all been  
17 given two pages in terms of his comment. He's  
18 with Midwest Independent Sales and Training  
19 Representative for VERTEK, and Vocational  
20 Rehabilitation Institute. Welcome, Mr.  
21 Reeves. You will have 10 minutes, and after  
22 that, I will open it up to questions from the

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1 panel. Thank you.

2 MR. REEVES: Thank you. I'm very  
3 happy to be here. And after going through all  
4 of the things that have been written, and I've  
5 had many conversations with the late Gail  
6 Gibson about what you were doing. This is  
7 very important to a number of us with VERTEK,  
8 but some of the advice was to just get right  
9 down to the things I've learned from training  
10 hundreds of people, and doing transferable  
11 skills analysis, disability determination,  
12 using the Oasis program, so I'm just going to  
13 jump right into some data elements, and some  
14 job analyst, and user training perspectives  
15 that I have.

16 One that was mentioned a little bit  
17 in the TSA Subcommittee is the certifications.

18 As people are collecting data about  
19 occupations, it becomes very problematic if  
20 it's an occupation that has a certification or  
21 a licensure attached to it. For instance, a  
22 person could have results of a transferable

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1 skills analysis come out where there are  
2 several or one occupation listed, and if that  
3 occupation has a licensure attached to it, for  
4 instance, having been a job developer and a  
5 manager of education and training, and a  
6 vocational rehabilitation consultants, it's  
7 one of my transferable occupations in the  
8 logic of the DOT right now is that I could be  
9 a principal. There would be kind of a snort  
10 with my local school board that I would not --  
11 I would probably have to go back to school for  
12 many years. So, some way to deal with that  
13 it's an occupation that's likely to have  
14 certification issues. And the certifications  
15 change from state to state, so it would be  
16 very hard to actually have that in the  
17 database, but some way to deal with when that  
18 came up, because that could be problematic for  
19 your end users figuring out can this person do  
20 work, or can't they? And if it's an  
21 occupation with certifications attached, it  
22 becomes problematic.

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1 Another data element that I could  
2 not find reference to is something called  
3 Combination Work Fields. Had anybody seen  
4 reference to that? But that also becomes kind  
5 of problematic, in that there are certain  
6 hands-on occupations, usually that have  
7 subsets, for instance, a construction worker  
8 II, a huge list of things are attached to that  
9 in the DOT, welding, abrading, gluing, and  
10 that would be something that in some systems,  
11 those are all included automatically if you've  
12 been a construction worker II. I know in our  
13 product, Oasis, it would only be if you could  
14 talk to the individual, and find out that they  
15 actually did have that construction site  
16 welding, or abrading, or gluing. It can  
17 greatly affect the results of a TSA search, so  
18 it's a data element.

19 The other thing, looking through  
20 Appendix F, where you were looking at getting  
21 a lot of input from end users, I just have to,  
22 on behalf of a lot of people using Oasis in

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1 the Midwest say to hopefully the door hasn't  
2 closed on aptitude yet. The Occupational  
3 Aptitude Patterns is a system that I think is  
4 already developed, and lends itself well to  
5 what we're looking for. It won't cover all  
6 the Cognitive Mental issues that you're  
7 looking at, but it is a system that all the  
8 vocational rehabilitation state agencies in  
9 this area use, aptitude testing. A lot of the  
10 employment networks use the aptitude testing,  
11 so if the limitation of what you're doing is  
12 that it can only be used for disability  
13 purposes within the Social Security  
14 Administration, one thing to look at is what  
15 are your ticket to work providers using. And  
16 I think you will often find that, I made a  
17 note that if a person can't do what they used  
18 to do, what are they apt to be good at, and  
19 apt to be able to learn? So, that is often  
20 something that people look to for helping a  
21 person, if they did decide to go back to work.

22 The point I make in my handout that

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1 I won't get into too much, is that people -  
2 I've run into people in my private practice  
3 that wanted to get off Social Security, and it  
4 was -- as the economy improves, there might be  
5 more people like that. So, it could be that  
6 ticket to work might have more than 1 or 2  
7 percent of your people looking at that, maybe  
8 new types of work will come out, but there can  
9 be a lot of things, and I think that would be  
10 something -- on behalf of my customers, we  
11 really hope aptitude stays in there.

12 The other piece that I've run into  
13 when I'm out training DDS people is that a lot  
14 of them were using the SCO, the Selected  
15 Characteristics of Occupations. That is  
16 nested within the 12 GOE interest areas, which  
17 got a very low rating in your user input, the  
18 12 GOE interest ratings. However, it seemed  
19 to be standard practice in some offices to use  
20 the skills and abilities nested within the  
21 work groups, there's 12 GOEs, and about 66  
22 different subcategories called work groups,

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1 where people were using that. I don't know if  
2 you'd want that to go on, but the other piece  
3 about that, if there ever was an interest  
4 inventory attached, which I know doesn't seem  
5 likely, the 12 GOE interest areas are often  
6 preferred by Voc Rehab people, because,  
7 whereas, the Holland Codes just have realistic  
8 as one of the six areas, the GOE breaks out  
9 mechanical, protective, industrial, and about  
10 four different areas. These are often the  
11 interest areas where people have been injured,  
12 where maybe they can't do their mechanical any  
13 more, but there might be something related to  
14 that, that would still be kind of lost within  
15 just the realistic field. And I'll move on  
16 from there.

17 There is another data element  
18 source that I might want to share with the  
19 Mental and Cognitive Subcommittee, and it's on  
20 the second page of your handout. I make a  
21 reference to a system called Workplace Mentor.

22 And this was developed over six years. It

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1 was a grant from the Department of Education's  
2 Rehabilitation Services Administration, and  
3 NIDR, the National Institute of Disability  
4 Research, but it is an example of a system  
5 that very specifically looks for the low-  
6 functioning population, how to do job  
7 analysis, how to do a consumer profile, and  
8 how to match those people. And I have some of  
9 the samples here, but I also have the websites  
10 to look at. It might be just something to  
11 add, if nothing else, at the data elements  
12 that you're looking for, for Cognitive Mental.  
13 And, also, Dr. Jeff Harris, I have listed at  
14 the bottom there. He's at the Vocational  
15 Research Institute, which is a part of the  
16 Jewish Employment Vocational Service of  
17 Philadelphia. It is a non-profit  
18 organization. He is an expert on aptitude,  
19 and also what's called situational assessment  
20 leaning towards supporting employment, which  
21 is what Workplace Mentor does. It has -- the  
22 system has built-in training. We've had a lot

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1 of field experience. We're trying to get  
2 people to do job analysis, and so there might  
3 be some useful input from his standpoint.

4 Moving on to because I am kind of  
5 the go-to trainer for Oasis when we have a  
6 high-stakes implementation of some sort, a  
7 couple of things that the job analyst might  
8 run into is especially after layoffs, I didn't  
9 see any reference to what are called composite  
10 jobs. A person might be the last person in  
11 their department, and suddenly has two or  
12 three job descriptions piled on top of them.  
13 And when we're doing transferable skills  
14 analysis, we often address that by you were  
15 the secretary, and the bookkeeper, and  
16 whatever, but the job analyst could be running  
17 into situations where it would be hard to  
18 discern that this is actually somebody who is  
19 the last person standing after a layoff, and  
20 they're actually doing two or three different  
21 job titles. And it's just kind of a heads-up  
22 that I would see could be -- could flummox

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1 some of your job analysts to watch out for.

2           The other thing that I run into is  
3 the end-user, not the job analyst, but the  
4 end-users of your database not being able to  
5 find the occupation, or its equivalent in the  
6 database. So, this brings up a training  
7 issue. I see people all over the road as far  
8 as how well they know all the different ways  
9 to slice and dice an occupational database to  
10 find exactly what they're looking for. The  
11 solution we've finally come up with was 15-  
12 minute training modules as flash demos. The  
13 attention span, if somebody talked about this  
14 for two hours straight, and if you aren't  
15 overwhelmed, you weren't listening. So, put  
16 it in 15-minute, 10 to 15-minute segments, and  
17 perhaps have a test that reflects just  
18 questions within those segments that would be  
19 very hard to guess at, or just know because  
20 you're kind of an expert. But that would be a  
21 way -- that's how I certify people for Oasis  
22 training. If you Google Oasis training,

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1 you'll see a, not as well as you will probably  
2 do it, example of taking people through  
3 different part, different steps of doing  
4 transferable skills analysis, and then being  
5 able to certify them. One of the benefits to  
6 it is, if they are licensed at some sort, you  
7 can also get continuing education units for  
8 doing that.

9           And, finally, the other thing, as  
10 far as what I've been running into in the  
11 field after 10 years of O\*NET, and if you  
12 Google O\*NET versus DOT, you get me. I've  
13 been an outspoken person of it really won't  
14 work for what you're trying to do, because  
15 very early on working with VERTEK, we wanted  
16 to see if we could use O\*NET to do  
17 transferable skills analysis. It is very hard  
18 to explain to people why it won't work, so  
19 I've been documenting as much as possible, and  
20 I've actually seen changes in O\*NET that could  
21 only have been because of what comes up first  
22 when you Google O\*NET versus DOT.

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1                   But despite my cause, I just ran  
2 across a presentation at a voc rehab  
3 conference in a nearby state where the  
4 subtitle was "O\*NET is the greatest single  
5 source of occupational information for rehab  
6 counselors. This presentation will provide  
7 participants with an overview of O\*NET, and  
8 how it can be used throughout the  
9 rehabilitation process to assist consumers in  
10 making good career decisions." And this was  
11 from a, "I'm very glad that you're going to  
12 the rehabilitation education conference."  
13 This was from their school within a major  
14 university, called the National Rehabilitation  
15 Institute. This is the Director. And what  
16 I've had to deal with is his students for 10  
17 years who will absolutely refuse to learn the  
18 DOT, even when they go to work for a place  
19 where they're supposed to be doing vocational  
20 evaluations using the DOT. They will try to  
21 make O\*NET work, and it gets very difficult.  
22 And what I'm finding out is some of them are

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1 promoted into the position of making policy.  
2 And, for instance, because of their leaning  
3 towards homogeneity, they don't want people to  
4 see job titles, even if they've been filtered  
5 to show high growth existing in the  
6 marketplace. The heterogeneity that you're  
7 looking for has been kind of trained out of  
8 them, and they're loyal to their professors.  
9 So, I just -- this is only a few schools, but  
10 the people that know the old DOT are getting  
11 fewer and fewer in the workforce. The joke is  
12 that IARP rhymes with ARP, but -- I heard that  
13 a conference. I'm sorry.

14 So, that very quickly covers some  
15 of the very specific data things that I see  
16 coming up from doing a little bit of what  
17 you're probably doing in a very good way, by  
18 the way.

19 The last thing that I learned from  
20 when I used to work in private corporations  
21 implementing person side and job side Human  
22 Resource Information Systems, was the database

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1 implementation paradox is that you don't know  
2 everything you need to know until you start to  
3 do it, and you have no business doing it until  
4 you know everything you need to know. So, we  
5 would say there has to be a pilot, there has  
6 to be experts from a lot of different parts of  
7 the thing. And what you're doing, as would be  
8 from the corporate standpoint, what we would  
9 look for as, is this going to work out? So,  
10 thank you very much. If there are any  
11 questions, I'll stay here.

12 CHAIR BARROS-BAILEY: Thank you,  
13 John. I'll go ahead and open it up to the  
14 panel. Any questions? Alan.

15 MEMBER HUNT: Can you go back to  
16 the combination work fields? Are you talking  
17 about the problem that the duties, or the  
18 applications are not sufficiently delineated  
19 within such a situation, or is there something  
20 else going on that I'm not grasping?

21 MR. REEVES: Well, just because I'm  
22 the trainer on Oasis, if you put in a number

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1 of different more hands-on occupations, like  
2 construction worker II, a screen pops up.  
3 These are the combination work fields attached  
4 to that particular DOT. And some people would  
5 select them all, and some people would select  
6 none. My advice has always been only select  
7 the ones, if you know that person did it,  
8 because it can affect what if a person was  
9 deemed transferable to a welding job, and yet  
10 they've never done welding. So, the  
11 combination work fields, that just wasn't  
12 something I had seen addressed during the TSA  
13 roundtable that you had. Did that answer your  
14 question?

15 CHAIR BARROS-BAILEY: Sylvia.

16 MEMBER KARMAN: Hi. Thank you very  
17 much, Mr. Reeves. One of the questions I have  
18 is about the first point that you made with  
19 regard to certification. Were you suggesting  
20 that it would be helpful for the SSA's  
21 Occupational Information System, if we were to  
22 gather information that basically is sort of

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1 binary with regard to yes, there is  
2 certification required, no, there isn't. Just  
3 so that -

4 MR. REEVES: Or it might be a  
5 might, or no, or just an indicator somewhere  
6 that certification might be an issue. I've  
7 heard that a florist has to be licensed in  
8 Texas, and that's probably not all over the  
9 country.

10 MEMBER KARMAN: Right.

11 MR. REEVES: So, trying to track  
12 certifications would be almost impossible,  
13 because they're always changing. But it could  
14 be just some indicator that certification  
15 might be an issue with that occupation.

16 MEMBER KARMAN: I mean, you know,  
17 right now our current policy is we don't  
18 concern ourselves with that, but it may, in  
19 fact, be useful for adjudicators to know  
20 whether or not a certification is even at  
21 issue, especially if we're looking at skills  
22 transfers. You wouldn't want, in other words,

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1 to be recommending something that -

2 MR. REEVES: If the skills transfer  
3 said they should be a massage therapist, there  
4 might be six states in the country where they  
5 could be, so that would be an issue if they  
6 weren't licensed.

7 CHAIR BARROS-BAILEY: I think an  
8 example of that is the use of TORQ in terms of  
9 a very broad application that somebody used  
10 with the O\*NET, where they did a transferable  
11 skills from somebody who was a team assembler  
12 in the RV industry, and came out with a dental  
13 hygienist. And I currently have somebody in  
14 dental hygiene school, and know that most  
15 states require licensing for dental hygiene.

16 MR. REEVES: It's two to four years  
17 training.

18 CHAIR BARROS-BAILEY: Two to four  
19 years, absolutely.

20 MR. REEVES: And it's a very --  
21 it's not for everyone, if you talk to them.

22 CHAIR BARROS-BAILEY: So, a system

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1 such as this where you don't consider  
2 retraining, that would not be a good  
3 transferable skills outcome to come up with.

4 MEMBER KARMAN: Also, I really  
5 appreciate your caveat about the composite  
6 jobs issue, which I'm sure a number of job  
7 analysts are going to encounter, so that was a  
8 good heads-up, appreciate that. Thank you.

9 MR. REEVES: I've been an out-  
10 placement consultant, and in some ways, the  
11 people I was helping find their next job were  
12 the lucky ones, because the people left behind  
13 were having all different types of job duties  
14 piled on them. And that will still be  
15 happening for several years in this economy.

16 The other thing, my pitch for  
17 aptitude is, if people with disabilities are  
18 going back into the workforce, the DOT was  
19 originally created to partly address  
20 frictional unemployment. The jobs are out  
21 there, people want to work, but there was not  
22 system for matching them. And there could

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1 be, I think, a great deal of interest, even  
2 though you really have to focus on what you're  
3 creating this for, but I think there would be  
4 a great deal of interest. Our customers for  
5 Oasis include workforce development, refugee  
6 resettlement. For instance, having the  
7 interpreter ask them what they did in Bosnia,  
8 or Somalia, and then, perhaps, even adjusting  
9 their language skills down, and seeing do  
10 they have transferable skills into the U.S.  
11 economy. And, sure enough, somebody from  
12 Bosnia has been some of those jobs that we  
13 haven't had since 1950 in their developing  
14 economy. And then they were delighted to find  
15 that Somalians would argue about whether they  
16 were goat herder I, or goat herder II, but  
17 that was the pastoral economy that they were  
18 coming from. Well, what else can they do  
19 without good language skills in our economy?  
20 So, there were all kinds of different  
21 applications that I've seen for Oasis, not  
22 that that's what you're going to address, but

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1 I would not be surprised if the data is very  
2 well received by a lot of different groups.

3 CHAIR BARROS-BAILEY: Okay. Any  
4 other questions of Mr. Reeves? Bob.

5 MEMBER FRASER: Just a quick  
6 question. Sir, the Workplace Mentor, was that  
7 developed at a university?

8 MR. REEVES: That was developed by  
9 a grant, under a grant from the Department of  
10 Education, and I have the literature here, and  
11 I have the search criteria there on your  
12 sheet. But it was created by the Vocational  
13 Research Institute, which is not affiliated  
14 with a university, and the lead developer was  
15 Dr. Jeffrey Harris, who is also the lead  
16 developer of the APTICOM system, which was the  
17 first computerized replacement for the GATB.  
18 And has since become CareerScope, which if you  
19 saw the list of all the VR and VA, and service  
20 providers, VR service providers that are using  
21 CareerScope, that is -- I'm a salesman, also,  
22 so I have to qualify, but it is a huge list of

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1 who is using that computerized aptitude  
2 assessment system.

3 MEMBER FRASER: But the information  
4 is on the website.

5 MR. REEVES: Yes.

6 MEMBER FRASER: Thank you.

7 CHAIR BARROS-BAILEY: Okay. Alan.

8 MEMBER HUNT: I read your comments  
9 in general between the lines as being -- as  
10 praising some of the processes we've followed  
11 here. Would you give us any comment, other  
12 than these specifics on the process as a  
13 whole? Where do you see gaps?

14 MR. REEVES: Well, a little bit of  
15 the heads-up was on the new crop of  
16 vocational rehabilitation people are trained  
17 on O\*NET. There are some schools that still  
18 train DOT, but a lot of those professors have  
19 retired, and it is very hard to -- when the  
20 Department of Labor says that DOT is obsolete,  
21 it's very hard to have a curriculum around  
22 something that you're not supposed to be using

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1 any more. So, a lot of people have been  
2 trained on O\*NET. They don't learn about the  
3 DOT until they go out and work at an  
4 assessment clinic, or in the field somewhere.

5 As far as finding people to be the job  
6 analysts, they will need some training, and  
7 indoctrination why your granularity is so  
8 important.

9 Also, with the -- because I sell to  
10 IARP people, one state, because of their  
11 Worker's Comp law, might have two to four  
12 hundred IR people, Missouri only has 19. I'd  
13 say only about four or five them do  
14 transferable skills analysis, so that is a  
15 very valuable group, but it's not evenly  
16 distributed from state to state. It would  
17 also, if it really only was to do disability  
18 determination, and it ends there, there might  
19 not be as much in it for them to help out.  
20 I'm making my pitch for aptitude again, but as  
21 far as the process, there's been some very --  
22 and who am I to say, but I've been very

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1 impressed by the comprehensive process that  
2 you're going through for developing what could  
3 be an extremely important tool for our  
4 country.

5 CHAIR BARROS-BAILEY: Thank you.  
6 Any other questions? We appreciate your time  
7 in coming here today to speak to us.

8 MR. REEVES: Thank you.

9 CHAIR BARROS-BAILEY: Thank you.  
10 Before I close for the day, I just want to  
11 open it up and make sure we don't have any  
12 loose -- anything loose out there in terms of  
13 agenda items for today.

14 Okay. We will resume in terms of  
15 the public meeting at 8:30 tomorrow morning.  
16 I just wanted to indicate that we do have a  
17 Fact Finding for the panel. It will be closed  
18 to the public, and we will start that up at  
19 about 2:30. And I think we will resume next  
20 door. Okay. Thank you.

21 Can I have a motion from the panel  
22 to adjourn for the afternoon?

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1 MEMBER GIBSON: So moved.

2 CHAIR BARROS-BAILEY: Shanan moved.

3 Do I have a second for adjournment?

4 MEMBER KARMAN: I second.

5 CHAIR BARROS-BAILEY: Sylvia

6 second. All those in favor?

7 (Chorus of ayes.)

8 CHAIR BARROS-BAILEY: Any opposed?

9 I didn't think so. Okay. We are adjourned.

10 Thank you.

11 (Whereupon, the proceedings went  
12 off the record at 3:09 p.m.)

13

14

15

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