SOCIAL SECURITY ADMINISTRATION

OCCUPATIONAL INFORMATION DEVELOPMENT

ADVISORY PANEL TELECONFERENCE MEETING

SEPTEMBER 29, 2010

SOCIAL SECURITY ADMINISTRATION

WOODLAWN, MARYLAND

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C O N T E N T S

P R O C E E D I N G S

OPERATOR: Good day, ladies and gentlemen, and welcome to the OIDAP quarterly meeting conference call. At this time all participants are in a listen only mode. Later we will conduct a question and answer session and instructions will follow at that time. If anyone should require audio assistance during the call please press "star," then "zero" on your touch tone telephone. As a reminder this conference call is being recorded.

I would now like to introduce your host for today's call, Ms. Debra Tidwell-Peters.

Ms. Peters, you may begin.

MS. TIDWELL-PETERS: Thank you. Good morning, everyone. This is the teleconference meeting of the Occupational Information Development Advisory Panel. Welcome.

I'm going to take a roll call to ensure that we have a quorum of members. Mary Barros-Bailey.

DR. BARROS-BAILEY: Here.

MS. TIDWELL-PETERS: Robert Fraser.

DR. FRASER: Here.

MS. TIDWELL-PETERS: Shanan Gibson.

DR. GIBSON: Present.

MS. TIDWELL-PETERS: Thomas Hardy.

MR. HARDY: Present.

MS. TIDWELL-PETERS: Janine Holloman.

MS. HOLLOMAN: Here.

MS. TIDWELL-PETERS: Allan Hunt.

DR. HUNT: Present.

MS. TIDWELL-PETERS: Sylvia Karman.

MS. KARMAN: Present.

MS. TIDWELL-PETERS: Deborah Lechner.

MS. LECHNER: Here.

MS. TIDWELL-PETERS: Abigail Panter.

DR. PANTER: Present.

MS. TIDWELL-PETERS: David Schretlen.

DR. SCHRETLEN: Present.

DR. BARROS-BAILEY: And Mark Wilson.

DR. WILSON: Present.

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

DR. BARROS-BAILEY: Good morning to all of you attending the teleconference for the Occupational Information Development Advisory Panel on September 29th, 2010.

As Debra reminded us, our proceedings are being recorded; therefore I would ask anybody to announce your name before you make a comment. And also, if you wish to be on mute you can dial "star six" to be put on and taken off mute.

Before we go through today's agenda I would like to set the stage for the meeting by giving a bit of reflection as to where we are as a Panel and the context of our charter, and also our mission.

I would like to follow along with our agenda. If you would like to follow along with our agenda, our charter, technical and working papers, past presentations, agendas and reports, public letters or other such correspondence you can go to our web site. And that is, Social Security "dot gov," forward "slash" OIDAP. Again, Social Security "dot gov," forward "slash" OIDAP.

Our December meeting will be during the two year anniversary of when Commissioner Astrue chartered the Panel. As I indicated in Boston, the anniversary of our charter provides us with an opportunity to evaluate where we have been, where we are, and where we may go. During reflective times like these, I consult documents that piggy back on the cornerstone of the reason we each said "I do" when we took our oaths at the inaugural meeting in February, 2009.

There are three pivotal guidelines in the first documents that I have been reading that I think are important for us to review today. Our first guideline is that our purpose is advisory.

I read our mission at the start of each meeting. I will do so again, because I think it's vital to delineate our role and responsibilities, and what Commissioner Astrue asked us to do 18 months ago.

Our mission states that we are to provide independent advice and recommendations on plans and activities to replace the Dictionary of Occupational

Titles in the Social Security Administration disability determination programs. It further states that we will advise the Agency on creating an Occupational Information System tailored specifically to SSA's disability programs and adjudicative needs.

Now, Commissioner Astrue called this the box that SSA put us in, and asked that we stay within it. We are not to get into policy. Despite, perhaps, any personal feelings or viewpoints that any of us might have that might take us outside of our mission. I want to thank the Panel for staying within the box and not getting distracted into areas that take us away or off track for something that is overwhelming in and of itself and incredibly important to SSA and to the individual with a disability, to users within SSA's disability determination process, and other stakeholders.

The key words that are important in our charter are independent, advice, and recommendations. This is not only the requirement of our charter, but also the cornerstone of the

Federal Advisory Committee Act, what's called FACA; and critical for us to keep in mind. No matter how many times I read the mission, and how often we present on this topic there is a continued confusion among the public that the OIDAP is actually the one developing the Occupational Information System or what we call the OIS, instead of SSA. We are not developing the OIS. And we need to respect the delineation between our advisory roles and responsibilities, and that of SSA.

The second Federal guideline is that our role is independent. Although we are considered to be special government employees under FACA, we are not an extension of SSA staff. I appreciate the fine line that is drawn sometimes in this distinction, and particularly how the ad hoc group bringing recommendations, and continuing today's discussion with us.

We must understand that as a group we advise, not dictate actions to SSA. And it is up to Commissioner and Occupational Information Development project to consider the recommendations

within the context of the project's mission.

There are also corresponding responsibilities on behalf of SSA to ensure that we keep to FACA's call for independence. That is FACA provides a hard right when it states that an appointing authority must assure that the advice and recommendations of the FACA group will be independent; and that there will be no inappropriate influence by the Agency or any other special interest, but will, instead, be the results of the Advisory Committee's independent judgment.

Under FACA we are given the monumental responsibility to be true to our mission, while the Agency is called to provide FACA panels with a leeway to fulfill its roles and responsibilities under the Act.

The third pivotal guideline that we were given in these materials is that our process is transparent and open. Although this has been a guiding principal for the Panel from day one, in reading the FACA materials of how panels are managed, transparency and openness are also

guidelines -- guiding principals for us under the Act.

Words and phrases like "practice openness," and "give feedback," and other such terms permeate FACA material. Part of today's agenda will demonstrate our efforts to comply with this guideline as a Panel.

In reflecting on where we are and may go I ran into a quote on a GSA web site that states, "Advisory Committees should get down to the public's business, complete it, and then go out of business." This is a great reminder that we are time limited within the scope of our mission, our advisory role, and that we give independent advice; and that it is our responsibility to engage by access by the public to our work.

So today that's just what we will do. We will start with a presentation by Sylvia Karman, who is not only on the OIDAP, but who also carries the heavy load of being the project director for the Occupational Information Development Project within the office of Program, Development and Research at

SSA. She will provide us an update on the development for the OIS.

Next, I will provide a Chair's report that -- of some of the activities that are and will occur over the next few months. Then I will ask Shanan to review the report that is a summary of the public comments received to our first report to SSA that was delivered to the Commissioner a year ago tomorrow.

The last item on the agenda will also be delivered by Shanan, who chaired an ad hoc group and -- of proposed recommendations from Boston a couple weeks ago. And based on the Panel's request we will visit the recommendation for deliberation today.

At this time I would like to turn this meeting over to Sylvia who will provide us with an update as to the Occupational Information Development Project. Sylvia.

MS. KARMAN: Thank you, Mary. Good morning, everyone.

I'm just going to quickly cover about four

different areas that I thought we should provide a little bit of status on, and given that we recently met in Boston just about a month ago.

First is the Occupational Medical Vocational Study. This is status reported as of 9/27. The quality reviews for the initial level Occupational Medical Vocational Study are moving along. We have completed the targeted reviews of the use of alternate DOT codes. We are also -- the full case reviews are approximately one-third complete for the initial level study.

The data collection instrument or DCI development for the hearing level study is ongoing. We have sent that DCI to a component that will be conducting the reviews in our Agency, the office of Medical Vocational Expertise, early last week and we have held a brief training session to highlight some of the changes in the initial -- in the changes from that in that particular DCI compared with the initial DCI that they are familiar with.

Now, the reviewers provided comments and identified some additional issues that our technical

person who is developing the DCI is currently addressing. These issues should be revised by early -- some time along this week, and we're hoping to have a day next week for our reviewers in the Office of Medical Vocational Expertise to experiment with the NDCI. And presuming that that goes according to Hoyle, we will be training and meeting with that staff next week and then training them, so that they could move forward.

Moving forward that would mean that after that training session the reviewers would then complete a pilot study as they did with the initial level review. The reviewers will each input data for the same 20 hearing business strategy for the training certifying recruiting -- for the same 22 cases for the hearing level, and results will be analyzed by OPDR staff to ensure quality standards.

Once those reviewers -- when we get the results of that particular pilot study and we're pretty sure that the protocol is understood, and that we do not need to make any changes to it, or clarify anything, then the full study will begin.

The next point that I wanted to provide status on is our blanket purchase agreement that we have now for the business strategy for training, certifying, recruiting of job analysts. Social Security awarded this agreement for services for the development and reporting on a strategy for training, certifying, recruiting job analysts on September 27th, 2010 to ICF, Incorporated. Their headquarters are in Fairfax, Virginia.

The initial work will include development of a job analysis methodology to include also a literature review, a detailed analysis and recommendation, and procedures on how to operationalize the data collection effort required for development of the new Occupational Information System. ICF will also begin to develop a business strategy for training, certifying, recruiting job analysts.

The third item that I want to report on is where we are in development of the content model, and, in particular, with regard to the document that we have most recently developed called User

Identified Data Elements for Testing. We are documenting the methods for how data elements were derived from core sources, panel recommendations, the users needs analysis results of a study that we completed last summer, public comments received through the end of the public comment period at the end of June, 2010, and of course, our Agency workgroup input. We plan to have this initial review completed by next week.

The fourth item involves a question that we had at the Panel meeting in Boston with regard to our work with -- returning to the Census bureau. Just as a reminder background, we met with the Census officials on July 26, 2010 in an effort to obtain a clearer understanding of the Census Bureau's American Community Survey and potential application of ACS, or American Community Survey results, and/or sampling processes to SSA's Occupational Information Development efforts.

At that meeting Social Security indicated to Census officials our interest in reviewing ACS raw data on the questions that they received

regarding employment. This information is the original information provided by respondents to the ACS questionnaire. The purpose of this review would be to more clearly identify the type and extent of employment information reported by ACS respondents, and to assess the potential feasibility and utility of applying this information as part of SSA's OIS sampling methodology.

Census officials agreed to allow such a review by SSA as long as the staff has the required Census special sworn status. We are currently in the process of obtaining the special sworn status for one of our staff members who will participate in the ACS data review, and expect to begin making arrangements to review these data in the near future. I just signed the release for that the day before yesterday. So I anticipate this to be coming up very quickly.

Then -- oh, I have another item. The development of comprehensive plans and business process. For that we are -- right now we have outlined a draft of our comprehensive -- for the

comprehensive plan, as well as a business process. The staff intends to meet next week to cover all the various issues and areas that we intend to include in the comprehensive plan. Our initial focus will be on research issues and questions so that we can begin to fill in the comprehensive plan; and we are anticipating having a draft completed by the end of October.

Thank you. Are there any questions?

DR. SCHRETLEN: This is David Schretlen. Sylvia, thank you, by the way, for that overview. Is it possible to get a copy of the ACS survey interview questions?

MS. KARMAN: Yes. Absolutely, we can get you that. It is online, I understand; but I think we have already downloaded it, so we can send it to you.

DR. SCHRETLEN: Okay. Thanks.

MS. KARMAN: Is there anyone else on line who would like to receive that?

DR. PANTER: Abigail Panter would.

DR. BARROS-BAILEY: Sylvia, could you just send it to everybody?

MS. KARMAN: We can do that. I didn't want to load up everybody's e-mail; but we will send it out to everybody.

DR. GIBSON: This is Shanan Gibson. I had a quick question for you, Sylvia.

MS. KARMAN: Sure.

DR. GIBSON: Could you one more time quickly go through exactly what is involved in the contract that's been awarded to ICF, because I was a little confused about whether or not the contract was focused on training of job analysts or development of job analysis tools. And it sound like there might be a combination.

MS. KARMAN: No job analysis tools. I'm sorry if that was unclear.

What we're anticipating doing in the first set of activities is for the contractor to assess what the processes are for job analysis in a variety of venues. For example, workers' comp, private sector, vocational rehabilitation; perhaps, the insurance industry. What do IO psychologists tend to do when they work with organizations? What might

be some of the processes that we could learn something from that are operating in, perhaps, the federal government, such as OPM or DOD? So it's really kind of a benchmarking. That may also involve a literature survey as well.

And then the next stage for that would be developing the business process that might be useful for Social Security's use of job analysts. So the business process for how Social Security may want to consider going about training -- recruiting, training, and certifying those individuals. Before the actual training and certification would take place Social Security would need to have a work analysis instrument, which is being developed separately and not by that contractor.

DR. GIBSON: Thank you.

DR. BARROS-BAILEY: Okay. Are there anymore questions for Sylvia? Thank you, Sylvia.

MS. KARMAN: You are welcome.

DR. BARROS-BAILEY: Okay. I will try to keep my Chair's report short. Perhaps supplied by my introductory comments, and as I mentioned at the end

of our meeting in Boston, I believe we are at a point in our existence where it is prudent and necessary to do some reflection with respect to how we can best and strategically assist SSA within the confines of our mission, and the responsibilities under FACA.

Last night I went back and read the Commissioner's words to us at the inaugural meeting, and was struck that one of the first things that he did when he became Commissioner was to engage SSA in the strategic planning process, out of which the need for the Occupational Information Development Project emerged.

Sylvia mentioned some of the plans that SSA is developing for the project that will, obviously, be vitally important in our own planning at the Panel level.

As part of my preliminary efforts towards a strategic planning process at the Panel level, I started engaging the User Needs and Relations Subcommittee through a review this summer of the information framework for incoming and outgoing communication. We continue with this -- these

efforts on user needs.

The research subcommittee will be meeting in North Carolina on October 11 to also undertake a similar review, and to undergo other discussions. As a part of our reflective process I have requested a meeting with the Commissioner on October 28th in D.C. It has been nearly a year since I met with him.

At this point in our process where our charter will be coming up for renewal, hindsight is a teacher when we can reflect on the opportunities available in the future; we plan on engaging in the strategic planning process. I believe that such a base with the Commissioner is key.

I thank him in advance for his openness and willingness to meet with us. I have asked three Panel members to accompany me to the meeting, Alan Hunt, Tom Hardy, and Mark Wilson; and want to thank them for working with me as we prepare to send information to the Commissioner before we meet with him regarding our intended discussion.

Lastly, as I work with our Designated

Federal Officer and Project Director to start developing the summary agenda, it is becoming abundantly clear that we will have a very full agenda, likely, three full days on the public agenda.

Therefore, I am anticipating another teleconference probably the week of November 15th to deal with some of the more routine subcommittee reports and matters to give us some relief at the quarterly meeting, and to maximize our time together in Baltimore on the 8th and 9th of December.

Then we will do a scan to get more precise dates for the teleconference. As a heads up, I will ask you to check your schedule for availability through the dates of November 15th to the 18th for another teleconference.

The intended agenda items being considered for such teleconference include regular subcommittee reports normally delivered at the quarterly meeting; a review of mental listings, SCRM; mental, cognitive, and taxonomy classification subcommittees and its pertinence to our work, and residual action

items from this teleconference, as well as review and voting on Minutes for this teleconference, and the Boston meeting.

Debra, Sylvia, and I are meeting in October to develop a framework and timeline for materials to be received from the Panel, such as subcommittee reports using the format that we had last meeting; and to deliver -- so that we can remit reports and documents to the Panel on a more timely basis. In a couple minutes, I would like to turn the meeting over to Shanan for review and discussion of the Public Comment Summary Report.

As I mentioned earlier, one of the three things that are consistent throughout the FACA literature is access from the public to our proceedings, recommendations, and so forth. The public comment process in our report are tools that we have used, and we will continue to use to meet this responsibility.

Although, the Federal Register Notice about feedback for our recommendations report ended on June 30th, we have continually indicated that we

will accept input from the public at any point. Either at our quarterly meetings or through a variety of electronic means. We have done quite a bit of outreach to ensure public knowledge and access of our work, and to invite dialogue that is pertinent to our advice and recommendations regarding the development of the OIS through a variety of means, including presentations of different groups and conferences not only is ensuring access to the public through our process, FACA, and duty; but also it is outlined in our charter the description of duties that states, "while the Panel's role is solely advisory, the duties of Panel include, but are not limited to: Attendance at meetings, review of relevant materials, and participation in presentations, discussions, and deliberations to prepare and deliver recommendations to the Commissioner."

Our evaluation of FACA activities and the strategic planning process might enlighten more efficient ways to ensure the public's participation. A very active commitment to outreach and engagement

to stakeholders is not just a general recommendation in our report to the Commissioner last year, but it is part of our very fiber as members of this Panel if we are to be true to the process. It is something I am deeply committed to as Chair and will continue to promote throughout this process.

Therefore, the first effort at receiving public comment to our recommendations goes to the very heart of the three principles of FACA, openness and transparency. The first report to the Commissioner assisted with the start of the process, was launched -- a launching pad for SSA to catapult it to research and development.

Because of the nature of our first report we have provided in terms of the FACA public comment process, we learned a lot. As a result, User Needs and Relations recommended that this Panel distinguish between a findings and a recommendations report, and develop a public comment process. Teaching reports that are findings based do not include recommendations, such as our review of the O*Net report by the National Academy of Sciences.

These require no public comment period.

The public feedback process for the content model classification's report has undoubtedly taught us that the topic of the OIS is of vital importance to the users, internal and external to SSA, and for various reasons. We have received numerous comments with our recommendations. Others that have caused us to reflect on the recommendations, or provided greater insight to them; and yet others that have little to do with the scope of our charter.

I recognize that our public comment process and feedback provides a platform for many voices, and respect them for taking the time to express themselves to us. If the comments are directly relevant to our scope of work they were considered in our schematic review of the public comment report. Note that some comments are completely reflected, while others are implied.

For example, several commenters called for OIS to be based on good science, be valid, reliable, et cetera. These comments involve a level of

inference as to what it would take to ensure that outcome. So in instances such as this example, the inference would be the importance of human and other resources to ensure the scientific genesis as reflected in general recommendation four of the Panel's report.

Not all recommendations bore the same weight by the public, which is difficult to reflect in such a grammatically based report. That is a high level vestral of all comments. That is descriptive of a detailed report, such as a government Agency typically provides. That was not the purpose or intent of our report.

I would like to past the -- the meeting on to Shanan, and the review of the Public Comment Report. Shanan.

DR. GIBSON: Mary, thank you for saying everything I wanted to say.

DR. BARROS-BAILEY: We probably should have coordinated.

DR. GIBSON: We probably should have coordinated. And quite frankly, my intention when I

saw this on the agenda was actually to review for those who are listening in some of the major points and highlights that came out of this discussion when it was held in Boston. Many of them were actually in attendance or listening in then. And as you realize, this is the exact same report that was discussed and reviewed there. So I don't necessarily see the need to go through it point by point again.

However, I did want to bring out a few things that have changed since then, and emphasize what we think the final outcomes were of it. Then we can discuss beyond that.

So since we met, the report has undergone a few slight revisions from the draft that would have been received at the Boston conference. In particular, we went back through, for example, the listing of actual comments and tried to assure that they were organized appropriately according to themes since we had analyzed them, or they had been organized according to the seven general recommendations put forth before the Panel. And as probably evident to many people, many comments are

actually appropriately categorized under multiple recommendations. So that was something we encountered.

We also wanted to make certain that we were more specific in giving dates and delineating the sources of feedback we received. So that is now reviewed or is reflected in the -- what should be the final version of this.

Something else which transpired since we discussed this in Boston. We received comments from the SSA staff who were part of the process. And as a Panel member I'm very appreciative of their time going through and looking at the report and providing us feedback regarding areas which might be of a concern to them, and how the report is digested by them outside the Agency.

What struck me as one of the fundamental outcomes of this report was the creation of and the passing upon the recommendation for soliciting feedback that was just reviewed by Mary a couple of moments ago, where the Panel agreed that we would issue findings report, which are distinct from

recommendations reports. But in the future that we would not issue recommendations reports until they had been put out for public comment.

We felt like this was a very important emergence within the Panel, because there was some concern when we gave our first set of recommendations a year ago that that recommendations report had been not publicly vetted as one would normally expect. So we thought this was a very important thing to document, that going forward when recommendations are proposed before they are finalized we will put them out for public comment; and that was voted on and agreed upon.

And as Mary said, this was a findings report, which does not rise to the same level as a recommendations report. So my guess is that after this discussion today, the draft report will be made available on the web, as our other internal documents are, as a summary document.

So to conclude, my secondary review of this from the executive summary of the summary of public comment -- I'm going to read specifically --

it says, "given the nature of the comments summarized below, the User Needs and Relations Subcommittee wishes to reemphasize the importance of the following issues to the Panel and the Social Security Administration.

"First, in the area of science and expertise" -- and this is largely an expansion from general recommendation four in the September 2009 report -- "we felt that the users repeatedly gave this either inferential or direct recommendation that we should" -- "that Social Security should expand efforts to establish an internal expertise unit necessary to assure that a strong research paradigm underlines the OIS in all the process. This needs to include a lead scientists and supporting staff that are well-versed in psychometric theory and work analysis; and they should identify internal staff with disability and program expertise to support this research unit.

"Until such time as an internal research unit is present, it is recommended that the SSA staff continue to work closely with the Panel

seeking its advice and recommendations on issues directly related to the scientific practice."

The second major area of finding from the review of outside comments and internal comments, I should say, was for transparency. And we viewed this as expansion of general recommendation seven from our September 2009 report. More specifically, it was recommended or found that continued efforts to involve stakeholders in the scientific community in the OIS development process is warranted.

In particular, adopting a procedure that provides the public with opportunity to comment on any internally developed prototype content model or tool was very important. These comments and recommendations are a vital linkage between SSA internal research and its external stakeholders who spoke to us through their comments.

It was also found that continued collaborative efforts with other governmental agencies with relation to the learning from existing OIS's, and development of a new OIS that meets SSA's needs was seen as a very important aspect of

behavior for people to be engaging in. We felt this was necessary because it helped SSA meet its burden of proof in being forensically defensible. We think it's important because it is the only way they can reflect our work nationally, and the importance of linking residual functional capacity as a requirement of work.

This includes all ongoing interactions with these other governmental Agencies as they relate to the development of OIS with another summary finding that we brought forth from the overall numerous ones from those who responded.

So at this point I would welcome any other comments or concerns; but I can say that with all honesty, there were really very few changes made from the report which was issued in September. And we can discuss further as appropriate.

Are there any questions?

MS. KARMAN: Yes, this is Sylvia. I don't know if this is really a question or more of a comment. I notice that there are -- under -- the way in which we represented the comments when we grouped

them in the Appendix B, for example, under recommendation four, there -- the comments -- the first two comments, in particular -- and thinking about the second one where it says, "develop an internal unit devoted to OIS design;" I mean, that actually is not a public comment. It is really -- that came from our Panel.

I do notice that there are comments from the public that go toward what Mary, and I believe Shanan was also indicating that, you know, we would draw inference from some of the comments that were received by the Panel -- received by the Panel in the area of methodology.

For example, there was some comments by the public about the need for a strong methodological underpinning to the development of additional definition. We need a methodology that's replicable. We would need to maintain rigorous standards.

So I mean, a lot of these comments certainly one would draw the inference that in order to address those comments, and in order for the

Agency to in effect have an OIS that meets those kind of standards, they would need to have the resources available to accomplish that.

So I just -- what I'm indicating here is that I think we may need to have some -- revision to some of the wording in the report so that it's clear when, in fact, members of the public have given us comment that would, as you say on the first page, support that which the Panel had recommended.

DR. GIBSON: Yes, there are included in this framework, and the framework that was put together by the internal staff working group, not only comments from the Panel, but also comments from your own internal user needs analysis.

MS. KARMAN: Right.

DR. GIBSON: So all comments were included as being relevant to this.

MS. KARMAN: Right. But what I'm wondering is, is given the fact that we're saying it's a summary of public comment that the reader might not recognize when one flips back to Appendix B, given that we did not, for good reasons, include, you know,

the source of every single comment there, especially since -- the way they were grouping them, that we may want to consider how we would want to reflect comments that came specifically either from Panel recommendations, so they are not public comments; or comments from another source, such as that which came from our user needs analysis.

DR. GIBSON: I want -- and I don't know how other Panel members would feel -- and I actually have no problem whatsoever, and I welcome if someone would like to go through the comments and footnote them or categorize them internally. But as a Panel member, I personally am not going to go through and footnote them all personally.

MS. KARMAN: Then, I guess, what I'm recommending, then, is that we would reflect that in the report itself either by -- you know, reflecting that in the language of the report, or footnoting it in the report that what we have done is included in Appendix B --

DR. GIBSON: All comments.

MS. KARMAN: Right. I'm just saying that I

think that that's not clear.

And then the other point I thought might be helpful for us to just -- this report gives the Panel an opportunity to really make clear what the Agency is doing, and what it is not doing. And among the comments that staff provided about, you know, the extent to which we received a number of comments from the members of the public that really go to policy -- disability policy and disability process. And we do mention that in the report, but I think this also gives us an opportunity to make clear that -- that especially when we are talking about the communication that may need to be taken out by the Agency, and even by the Panel, that this gives us an opportunity to revisit how we can make it more clear what it is that the Agency is engaged to do and what it is not doing.

DR. GIBSON: Sylvia, how would you recommend wording that? I mean, you mention that it is in the report. Where would you recommend noting that? Again, the how to write with policy.

MS. KARMAN: Yeah. I think what we have is

under the summary I think we mentioned -- oh, gees. We have a bulleted list where we're showing what people have said that was really not on point, in other words. It was outside -- I think it was reflected as being outside the scope of the Panel. So therefore, the Panel didn't take it up as an issue just so that commenters would realize yes, we heard you. We received the comment. We acknowledge that we read it and considered it; but we, the Panel, are not taking this up in our report, because it's outside our scope.

It's on page 11 of our report. Many other comments related to the current process of disability adjudication are not relevant to either the OIDAP scope of current activities, general categories listed below, blah, blah, blah; and the readers are referred to Appendix B to read associated comments with change development, change of existing policy, et cetera.

I'm thinking that there -- we may want to say in our section -- perhaps under -- you know, it could be under the first part. The first

recommendation where we talk about the data, technical and program requirement. We could say something there possibly, depending on how we want to address this.

We might want to put that comment under the recommendation for communication for recommendation seven. That, you know, given that there were a number of comments that went towards policy and process, that, perhaps, the Panel and the Agency should take that up again. You know, how could we be more clear about that? Or how can we address that misconception?

DR. GIBSON: Okay. So those are just clarifications --

MS. KARMAN: Right; right.

DR. GIBSON: -- nothing that changes any of the findings. Okay.

Maybe we can just deal with that like we did with the National Academy's report where those slight wording modifications were made. We sent it out to the Panel. If everybody was 100 percent in agreement with the final wording, then, we finalize

the report, and move on.

Is that -- does anybody disagree with that in terms of the finalization of the report?

DR. WILSON: This is Mark Wilson. No, I don't disagree with that, but I want to make sure I understood Sylvia's first point, which seem to be that -- she wanted to make it clear that -- there weren't public comments specifically mentioned in an internal scientific unit; but that it wasn't a bunch of an inferential leap, given what comments were from the public, that that would be a reasonable way to deal with the public comments that were made.

Is that true, Sylvia?

MS. KARMAN: Yes. What I'm noticing, you know, when I just flipped through the comments that we have received that we -- from members of the public that are under the -- on recommendation one; the section in recommendation one, "maintain rigorous standards and criteria evaluation, field study, data collection, and coordination with other federal entities." So that sort of gets at two points; one, collaboration with other federal entities. Also, the

rigorous work that is needed to accomplish the work development of the OIS.

There were a handful of similar comments, and they weren't necessarily reflected under, quote, unquote, establish a scientific unit. So I think that it might be helpful for us to just raise that awareness in the language of the report, because when one goes to Appendix B of the report all of the comments are summarized under there. And some of those quote, unquote comments are really not comments. They were actually the recommendations of the Panel, and/or they were comments or recommendations that came from the user needs analysis, neither of which are public.

So I just thought that that might be helpful for people to understand it. It wasn't as if a lot of members of the public wrote in saying yes, Social Security should get a scientific unit. I mean, that wasn't really what was actually said.

DR. WILSON: Right. It was more of what -- in order to --

MS. KARMAN: Accomplish it.

DR. WILSON: In order to deal with the issues that they did raise, that would be a not too big --

MS. KARMAN: Correct.

DR. GIBSON: Well, and there were individuals that specifically said this is not SSA's realm of expertise. They should let other agencies do it, because you don't have the scientific expertise. So again, that's one of those areas where it's very easy to make the inferential leap.

MS. KARMAN: Right. Right. I think on reading it, it isn't -- it may not be apparent to a new reader coming to this issue, or this document who may not have sat in on a lot of these meetings to realize that we were pulling together the gist of what the members of the public were telling us.

We were trying to be true to that. In trying to be true to that we want to be clear about what the Panel said versus what the public said.

DR. GIBSON: Right. Although, our Panel, and I believe the user needs analysis work within the public domain too. Correct, they are published?

MS. KARMAN: Right.

DR. BARROS-BAILEY: Okay. So back to the clarification language, and then sending out the final draft to the Panel as we did with National Academy of Science review report. I'm not hearing anybody saying we need to do anything beyond that. Is that accurate?

Okay. Shanan. Thank you for that. Thank you for the discussions on that.

I will ask is there anything else that anybody else wants to bring up in terms of the report before we move on the agenda?

Okay. Well, before we segue to the proposed recommendation that I wrote in Boston, I want to remind us of the first two principles that I discussed at the start of the meeting, as well as what both Shanan and I discussed that was a change in our operating procedures. That a process of public comment is to -- before we vote on the final recommendation. So at this point we're going to be dealing with the proposed recommendation.

Within -- with respect the first two

guiding principles, our role as being advisory and independent, I see this agenda item very simplistically. You must answer two questions, and we must hold them in our mind with respect to our deliberation.

First, is the proposed recommendation advisory? Second, is it consistent with our defined purpose identified in our mission? So if we keep those in mind, is it advisory, and is it consistent with our defined purpose identified in our mission.

That is Shanan and the ad hoc group that worked on the proposed recommendation that Shanan will discuss shortly, took great pains to ensure that they did not cross the lines with either of these questions. I know that it was hard. Thus in our deliberations we need to be cognizant of any wordsmithing that could be interpreted to cross these lines.

Shanan, if you could start us off by discussing a little about the process that the ad hoc group undertook, and then lead us through a discussion of the recommendation.

DR. GIBSON: Okay. A couple of things I want to do. First, I want to thank the members of the ad hoc committee who helped rewrite the document we began with in Boston. So Dr. Mark Wilson, Dr. Abigail Panter, and Mr. Tom Hardy were invaluable in helping me clarify the intent of multiple panel's viewpoints. And we tried to bring different perspectives and insight to this.

I also want to thank the members of the whole Panel -- our other members of the Panel who sent us feedback as we got to the point where it's actually being presented today. So there were many people who had input into this, and that was greatly appreciated.

For those who are listening in and looking at a copy of the agenda for today, I want to clarify something in the wording, which I think is fundamental to the recommendation before we actually get to that; and it helps explain to the process we went through. If you are looking at the agenda the item says this is a discussion and deliberation on the OIDAP proposed recommendation to SSA on an OIS

plan. And this is not a recommendation on an OIS plan. This is a recommendation for OIS development planning. We are not making a recommendation for what should be in their plan. We are not telling them how to write a plan. The recommendation is focused on development planning. Because the members of the ad hoc subcommittee felt very strongly that without an overarching guiding plan in place, the Agency would encounter many roadblocks; and perhaps, have to make many double back U turns as they kind of went in the dark.

So we believe that a business process planning is integral to most organizations, and this would be no different.

So we introduced a basic recommendation, as many of you may remember in Boston. However, it lacked much of the detail and clarity that we hoped to, I think, get across to the Panel or get across to SSA in terms of what we wanted to give or advise, which Mary just reiterated.

So at this point I really have no choice -- I'm sorry for those of you who are

listening in -- but to read our proposed recommendation for OIS development planning to you, so that you can understand, and so that all members of the Panel, you know, will all be on the same page as we go forth with this deliberation.

So, here it goes, the proposed recommendation for OIS development planning verbatim.

"In keeping with its charge to provide independent advice and guidance on plans and activities to develop a new Occupational Information System, that, "A," helps the Social Security Administration meet its burden of proof and be forensically defensible; "B," reflects all work nationally; and "C," links residual functional capacity to the requirements of work and that replaces the Dictionary of Occupational Titles for disability adjudicative decisions. The OIDAP Panel strongly recommends that SSA:

"One, take the immediate step to develop an overarching project plan and timeline that specifies SSA's needs and objectives with regards to

occupational information.

"'B', develop a fully articulated research plan and associated processes that provide for the coordination of necessary scientific research and allow for the incorporation of findings and results as appropriate."

And "'C', make public the aforementioned project and research plans, thus, delineating how the Agency plans to proceed in its efforts to develop said Occupational Information System.

"The project plan should include scientific and programmatic justification for SSA's efforts going forth, as well as identification of the criteria that will ultimately be utilized to assess the performance of any new OIS system.

"To fulfill the requirement of aforementioned project plan, SSA must also develop and make public a scientifically sound research plan that addresses the needs delineated by the project plan, and that will guide the entire OIS development process. To meet SSA user needs, maintain stakeholder confidence, and ensure legal

defensibility, it is critical that all intended research protocols be developed internally by scientists well-versed in research methods and be reviewed by the Panel prior to data collection.

"Examples of issues that should be addressed by the recommended research plan include, but are not limited to, how to develop a content model that is legally defensible and possesses strong evidence of validity, determine the appropriate sampling methodologies for pilot testing of all instruments, develop a job analysis tool that will be utilized for collecting occupation information (including appropriate scales, methods of data collection, sources of data, et cetera), and so on. The Panel recognizes that any plan that is developed will be necessarily dynamic as new information and data may inform future steps; however, this does not negate the need for a published plan that is scrutinized for scientific rigor and adequacy.

"In conclusion, the Panel wishes to emphasize that to achieve the goal of a legally

defensible OIS, rigorous scientific methods must be utilized. The original recommendations and associated subcommittee reports identified numerous empirical studies that should be conducted as a part of the process of developing a new OIS; the Agency should examine these recommendations and identify those proposed studies that meet the requirements of good science and SSA disability program law and regulation for coordination into the projects and research plans going forth. In addition, those existing SSA efforts that meet the requirements of good science and SSA disability program and law and regulation should also be coordinated into the project and research plans going forth.

"Finally, the Panel recommends that the overall project plan, including the attendant research plan, be prepared (along with technical reports on existing efforts) and made available for advice and recommendation before further developmental activities for the OIS proceed."

So as you all hear, I hope, that what we were trying to articulate was that we thought it was

vitally important that SSA take a moment to stop, develop a comprehensive project plan, timeline, criteria, goals, objectives, research plan, which integrates into the project plan going forth. Make these available, subject to scientific scrutiny. And in this way we hope to have a stronger sense of guidance going forth and lay the framework for optional -- excuse me, optimally an OIS that will be legally defensible.

Any comments, questions or discussion, I presume.

MR. HARDY: This is Tom Hardy. Shanan, I thought you did a wonderful job in reading this and even a better job in writing.

DR. GIBSON: Thank you. I could not have done it without help, as I said. And I never did want to read children's story for a living.

MR. HARDY: I reviewed this in advance. I like everything. I had no real wordsmithing problems. The only thing I noticed was I might want to make a friendly amendment, because on the very end, your last paragraph, "finally, the Panel

recommends the overall project plan," blah, blah, blah to be submitted to for advice. That actually might go back up into the bulleted area because the report is a recommendation, and you have three recommendations listed, and the fourth one kind of dangling out there. I would ask you to consider moving it up as a recommendation.

DR. GIBSON: I certainly would be willing to consider that as a friendly amendment. If others want to comment on the idea that there is actually a fourth recommendation within the document, which is at the bottom. Perhaps, if we move it to the top that would be more consistent and also give it more emphasis. So basically, moving the part, "the overall project plan," including research plans be prepared and made available for advice and recommendation. The last paragraph would actually become another bullet.

MS. KARMAN: This is Sylvia. I agree. Tom, that's a good catch.

I am wondering, though, are we saying -- are we the Panel saying that we recommend that the

Agency make the plans available for advice and recommendation by the Panel? I mean, in other words, public advice, Panel advice? What are we saying?

MR. HARDY: This is Thomas. I believe the intent was to have it be returned to the Panel for advice --

MS. KARMAN: That's what I thought. It wasn't clear to me, so.

DR. GIBSON: I would concur with Tom. Our intent was that it be given back to the Panel in time to be reviewed, hopefully, by the next meeting.

MR. HARDY: Yes, I would say -- this is Tom speaking again. I would say in reading it to make it more textually clear, make available for advice and recommendation by the OIDAP Panel before -- and then have that in there. We would like it to go back to us for advice and recommendations as our role.

MS. LECHNER: This is Deborah Lechner speaking. The question I have with regard to that final paragraph versus the final bullet that's on the first page is that a different step before we make --

before the project and research plans are made public they are presented to the Panel for feedback, how does that integrate with that last bullet?

MS. KARMAN: That's a good question. This is Sylvia. Because once we -- when we deliver something to the full Panel and it's discussed in a Panel meeting, by virtue of that, materials, you know, are then available.

DR. BARROS-BAILEY: Sylvia, the only exception to that is --

MS. KARMAN: Predeliberation, yeah.

DR. BARROS-BAILEY: Predeliberation, and SSG that we have access to.

MS. KARMAN: Right.

DR. BARROS-BAILEY: So if it's in predeliberation status, we can take a look at it as a Panel.

MS. KARMAN: I mean, I would -- in responding to Debra's comment, I would see it as a separate step; but we would need to reflect it that way.

DR. GIBSON: This is Shanan. I would

concur. It actually does seem like it would be a third step instead of the fourth.

MS. KARMAN: Right.

MS. LECHNER: This is Deborah Lechner again. On a totally separate issue a question I have is -- as I read through this, and I brought this up to some extent in our last full Panel meeting, my question becomes how is this different from the road map that's been developed in the future -- or developed in the past. And also, when I went, sort of trying to answer that question for myself, I went back in preparation for this call and looked at previous road maps. And I pulled out -- the last one I pulled out was dated 5/19 of 2009. So it was very early on in the process, but it was a 12 page document with some plans, some timelines.

And so my question becomes, has the road map been updated since the Panel provided its recommendation? Does it continue to be an ongoing working document.

DR. BARROS-BAILEY: And is that -- is it a document that could be further developed into this

project plan?

Because to me, they seemed somewhat similar .

DR. GIBSON: This is Shanan, if I could comment. When I first started using -- putting together the language for this -- you all may remember -- we actually referred to this as a business plan. That created some confusion, so we changed it to a project plan.

The language I'm used to using is business process planning. My comment very early on when we came back to Boston when I worked on revising this document with others was that some of what -- at least from my perspective, some of what is in that road map is very important to doing the business process planning. It is just that in and of itself was not an adequate business process planning for that piece of it.

MS. LECHNER: Yes. I agree that there needs to be expansion and further development. But my question really is more to Sylvia in terms of, you know, Sylvia, is this still a working document, or

did things change so radically with this submission of the Panel recommendations that -- that you have kind of abandoned that document, or can you give me a little update on that?

MS. KARMAN: Okay. This is Sylvia. First of all, it did seem to me that you are asking two questions. One is, how would this recommendation be different from a road map or basically a chart, you know, a timeline?

My understanding of what this recommendation is about is that it is a -- it is a fuller articulation of the Agency's approach and plans to develop the Occupational Information System. So that it would take on more components that are frequently reflected in a business plan. But you know, I don't want to put words in the mouths of the people who were in the ad hoc group that did this.

The second question that I am hearing is, and so, what of the timeline or road map that we have been using? And yes, I mean, it did not go away, or -- you know, I think what we're

anticipating doing is expanding the points in that road map so that it -- we layout, for example, the research issues, the research questions, the methodologies that we should be considering to address those things. What kinds of contingencies should we be looking at, given that a line of investigation or study may not lead to a result we're anticipating; you know, what other options might we pursue? I think that seems to me to be far beyond just a road map. Not that the road map itself isn't useful.

So the answer to your second question what -- what I'm seeing as your second question is that the road map, as it was conceived, does not change materially. It is just how would we go about implementing those things. We have learned a lot over the last year, and that would inform how we would expand on that.

Shanan, am I reflecting that the way you all intended?

DR. GIBSON: You certainly are from my perspective.

MS. KARMAN: I have a -- oh, I'm sorry, go ahead.

DR. WILSON: I was just going to say -- this is Mark Wilson -- I thought you did a great job of explaining the difference. The road map is one tactical piece that would be part of this; but your request here sort of good beyond that.

MS. KARMAN: Right. I mean, actually the way I understand it, and the way we're approaching this at this point on our team is that something like a road map or a timeline would appear in the plan, would be a component of the plan.

MS. LECHNER: Yes. This is Deborah Lechner again. That's what I read into this, but I just wanted to clarify that that's -- you know, that that's part of -- the road map would be part of it. And also, just trying to link the pieces of what we have done or what you all -- because you, Sylvia, I believe you and Mary and others may have created the road map; but just trying to link, okay, here is where we started from. Let's build on that, and not sort of -- or revise that, instead of reinventing the

wheel.

MS. KARMAN: Correct. Correct.

MS. LECHNER: The other question I had after reading the document is are we recommending that this team -- or this internal -- these internal scientists that are referred to down there in the third paragraph, are we recommending that they be the ones to develop the project plan and the research plan, or is SSA developing the project plan and the research plan, and then seeking scientists -- internal scientists to execute?

MS. KARMAN: This is Sylvia.

Deborah, I'm really glad you mentioned that, because I actually had a friendly amendment to that last sentence in that paragraph. Where I was seeing the need for us to make clear that the plans would be developed internally by scientists working alongside other SSA program staff.

So in other words, if they are all SSA staff and some of them with the background in science. Some with a background in SSA disability programs, that's how I would -- that's how I would

approach that.

MS. LECHNER: And I think that would be important.

And then my follow-up question is, as a Panel, do we want to -- and there may be some strong feelings about this -- but I ask myself, do we want to lock ourselves into recommending internal scientists only; or could it also be an outside contractor that has the scientists that would work alongside the SSA staff folks to develop these plans?

Because, you know, while we all may sit around the table and think an internal scientist would be the best option, maybe it's not a feasible option for a number of reasons. So if it's not feasible, then, you know, are we locking ourselves into position where we would -- you know, if there is not internal, then there is nothing. So, you know, my thought would be to say an internal or external team of scientists that are well-versed in research methodology; and I'm just throwing that out on the table for Sylvia and others to respond to.

DR. WILSON: This is Mark Wilson. Without your own internal scientists, could you describe for me how they would evaluate the scientific rigor, adequacy of any contracts or proposals?

MS. LECHNER: And I think that that is a concern. And I'm not saying that I -- I don't agree that an internal scientist is optimal; but, you know, I'm also wondering if -- is it within the scope of the Panel to serve in that assessment role, or is it possible that they contract with one outside person or group of scientists to develop the plan, and another to provide oversight? And you know, again, I'm not saying that's optimal; but I'm trying to explore and present all possible options if an internal team isn't feasible.

MS. KARMAN: This is Sylvia. I'm wondering if maybe -- maybe this is something that could be addressed pretty readily by, you know, maybe wording. Just slight changes in wording so that we maybe say, you know, given that to mean SSA user needs maintain stakeholder confidence and ensure legal defensibility. I mean, all three of these things you

would need programmatic staff as well as people well-versed in scientific methodology to assist with that.

So then we can say, it is critical that all intended research protocol will be developed. And we don't have to say "internally." We just say, you know, by staff that are well-versed in SSA disability programs, as well as research methods.

DR. SCHRETLEN: This is Dave Schretlen. I wonder, Sylvia, what might work there is in the third line from the bottom of that paragraph, instead of developed we said something like "supervised." So that --

MS. KARMAN: Okay. We have a new Panel member.

(Interruption of dog barking.)

DR. BARROS-BAILEY: We might want to star six.

DR. GIBSON: I actually personally liked David's recommend wording. To move off of what Mark said, I personally think it's important that we specify "internal," because one of the things I hope

as a Panel member to convey to SSA is the importance of -- since this is an expansion of a recommendation that we already gave -- that they develop the internal scientific expertise they need to develop and implement and maintain this process.

MS. KARMAN: David.

DR. GIBSON: Internally is a real big thing.

MS. KARMAN: This is Sylvia. I understand that the transcriptionist may need David to repeat his question.

DR. SCHRETLEN: I just was suggesting to change the verb "develop" to "supervise." And the idea being that -- saying that you are supervising it internally, that leaves open the option that you are drawing in expertise from external sources.

MS. KARMAN: I would suggest oversee.

DR. SCHRETLEN: Oversee.

MS. KARMAN: Yes.

DR. SCHRETLEN: I like that.

MS. KARMAN: Yes. That works.

DR. SCHRETLEN: That way you are not for a

higher burden -- because I do appreciate that if you say "developed by," that's placing a huge burden on that internal unit.

MS. KARMAN: I really also think we need to include the programmatic part of this. Because I think it's really easy for people to presume that, you know, without -- that all you would need is just people with one set of -- with one set of background; but I think having both the scientific and disability program perspective is really -- it's unique to this effort.

DR. GIBSON: It is, Sylvia -- this is Shanan. It is, Sylvia. But on one hand I tend to disagree with that, not because in any, way, shape or form I want to remove the importance of the programmatic knowledge, but because we specifically said research protocols. And I think research protocols are within the realm of science, not necessarily within the realm of program. We are not asking -- I'm sorry.

MS. LECHNER: This is Deborah Lechner. I really agree with Sylvia, because I think that any

development of research protocols has to take into consideration the existing programmatic pieces from the SSA side, because if they don't they are going to develop a research plan that excludes that, and is not relevant to SSA's process. I don't really think it has to be a real team effort.

DR. WILSON: This is Mark Wilson. I agree. I think we might be dancing around terminology here in terms of what the roles of various stakeholders are. And another -- it kind of goes to another reason why we need an internal unit. The whole point of an internal unit is scientists would be sensitive to the needs of Social Security if that's their employer, and would take the role of the Agency's needs, and help interpret that in terms of what the scientific efforts are.

So to me -- I like David's suggestion of supervise or oversight. I certainly think inherent throughout the document is the implication that programmatic and policy type concerns are paramount when you have an internal unit.

The concern I have -- and I'm interested

to see what other people say -- is that unless there is some effort to maintain the independence or objectivity of any scientific unit, be it internal or external, it would seem to be driven by -- I guess the question comes down to who is the ultimate decider of how research gets designed and implemented. And I think we have to be careful here in terms of how we word this, so that it's clear that whatever study gets done meets the most rigorous scientific standards; but at the same time reflects the interests and needs of the Agency.

I think the best way to do that is to hire and vette internal scientists, and then trust them to consult and do their job appropriately and move forward. But if other people are less comfortable with that, then, you know, maybe we need to work on some more wording here.

DR. HUNT: This is Allan. I have a couple of comments. First, I think I -- I'm concerned -- I mean something like a job freeze or hiring freeze comes along, does that mean we're going to park this project for the interim, or does it mean that the

Panel has to step in and provide this kind of expertise? I don't think either of those would be -- would be desirable.

So I would -- while I agree with Mark that the best of all ways to do this would be to assemble an internal team that would be permanent and be there at SSA, and able to defend itself and its plan, I think we should be careful about recommending something that's not feasible.

And let me go on to say I was -- I came into this discussion prepared to complain, if you will, about the use of the terms "project plan," "business plan," "research plan;" and they are used somewhat interchangeably. I think that reflects the etiology of this document, the way it came to be.

Perhaps, we should make a distinction between what I would think was really interchangeable, which would be a project plan or a business plan, and a research plan, which clearly requires a different kind of expertise, and a different kind of oversight and review.

DR. GIBSON: Allan, this is Shanan. You

must be looking at the older version. The newer version no longer has the word "business plan" anywhere in it.

DR. HUNT: Oh, great.

DR. GIBSON: That was a miss, we call it. So on the last version sent out by Debra you should have no business plan in it.

DR. HUNT: All right.

DR. GIBSON: So it's project plan consistently.

And, yes, I would agree with you. That's why we tried to designate a project plan, and then research plan, which is an integral part of a project plan.

DR. HUNT: Right. As a separate, yeah.

DR. GIBSON: Those were separate. But business plan is no longer in the document.

DR. HUNT: That's an improvement. I just think, you know, maybe it's necessary to make a more explicit statement. You say, must also develop and make public -- okay.

Well, anyway I'm just thinking that maybe

if these two are regarded and treated as different administratively by SSA, I don't think that there would be any difference in the Panel -- desirability of the Panel review; but maybe they have been constituted differently at SSA.

MS. KARMAN: This is Sylvia. When I was reviewing the original version, and then subsequent version we had some -- you know, I had some discussion with Shanan about the ways in which we would set up these four bullets or whatever -- right now there is three bullets; but with the addition of Tom's comment there would be four.

And among the things we were talking about was, you know, are we saying that a plan, whether it's business plan or project plan, or whatever this document is, would include, you know, the timeline of research issues, questions, and basically -- you know, research plans, other components?

You know, but we -- I think -- the sense I was having was that, you know, we, as a Panel, really didn't want to be recommending -- getting down to that kind of level of -- of detail, you

know, to tie the Agency's hands with whatever document it feels that it needs to articulate what it's going to be doing; but I'm understanding that the research plan is something that's included in. It's subsumed in the project plan. I don't know if that's clear.

MS. LECHNER: Yes, this is Deborah. I think, having worked with a number of different research teams people use these terms to mean different things. So I can understand the need not to make this particular recommendation so specific that it locks the Agency into anything.

At the same time, I want to make -- I want to create a recommendation that clearly articulates the Panel's expectation. Because I don't want to be sitting here three months from now and having SSA submit a project plan or a research plan, and the Panel saying oh no, no, no; that's not what we had in mind all.

So I don't want it to be a guessing game either in terms of the Panel's expectation. So I have really mixed feelings about how detailed we

should make this in terms of our expectations, and how general to make it.

DR. GIBSON: Sylvia, you said at this time that -- I'm sorry, this is Shanan -- that you are working on a draft project plan.

MS. KARMAN: That's correct.

DR. GIBSON: I am guessing that's coming based on work with the new David -- which is what I have started calling him -- in terms of the research he has pulled together on business process planning.

MS. KARMAN: Actually, it began even before David Blitz began with our staff under an intergovernmental personnel agreement. He is certainly working closely with us on it, because he is, of course, a member of our staff. But another member of our staff, Mark Trapani, investigated a variety of approaches that have been taken by a number of entities, one of which was the World Health Organization, and their plan that they have developed to lay out steps they want to take to revise the ICD. So that's one approach we're looking at, and thinking that we may want to consider. So I mean, there has

been a fair amount of work that's been going on over the last six weeks.

DR. GIBSON: Right. I was just wondering if, perhaps, with -- I don't know if my copy actually integrated Tom's comments into bullet number three; prepare and make available to the Panel the overall project plan, including the attendant research plans for advice and recommendation before further developmental activities for the OIS proceeds.

I am wondering if there is not intermittent steps where the plan draft can be made available to the Panel, and therefore, we don't reach that point Deborah mentioned where it's gone all the way through, and they're like, oh, no, that's really not what we had intended. It can be used for advice and recommendation to help facilitate that.

MS. LECHNER: The other -- this is Deborah Lechner again. The other question I had about that final paragraph that says that this plan be made available for advice and recommendation before further developmental activities proceed. And my

question is, is that statement even realistic now, or what expectation -- what implications does that have for the project that's just been awarded to ICF?

You know, so the way I read that is that ICF project shouldn't proceed until this project plan -- this overarching project plan, research plan are laid out -- clearly laid out, and that we have had a chance to review it, and make recommendations on it.

MR. HARDY: This is Tom, I'm getting a little confused. It seemed like we have a couple of different topics going. Am I correct?

MS. LECHNER: We do. You are right in there, Tom.

MR. HARDY: This is kind of my legal mind. I could follow it a little more clearly if we would kind of --

MS. LECHNER: Stick to one.

MR. HARDY: -- take one thing at a time, because we are going to end up with four different conversations, and jump back and forth.

So I guess I would like to go back to what

we started with, which was meet SSA user needs, maintain confidence, et cetera.

Have we come to any kind of unity on how we want that sentence to look?

MS. LECHNER: Which sentence are we talking about, Tom?

MR. HARDY: This was the legally defensible, critical that all research be developed internally by scientists well-versed, etc. David had put out there some idea of changing that. I know we talked about it. Are we coming to some sort of agreement on that? Can we start with that one first.

MS. KARMAN: Yeah. Thank you, Tom. This is Sylvia. Because actually, I think there were really two issues that were going on there.

One was the one where David was recommending that we take care of whether it's internal, external, whatever -- maybe we should say oversight. And I had recommended -- and I think somebody else may have chimed in on that -- that, you know, I think it's important that we recognize that the plans overall, including research plans,

will be done, you know -- and provided oversight by both programmatic and scientific staff.

MS. LECHNER: Right. You know, and I -- I think Allan and I were both speaking to the issue of feasibility and that term "internal." And if we're going to leave "internal" in there as the optimal, I think, you know, we at least need to say optimally by an internal team; but if not, then by an external team, unless we're willing to say park this until you can hire internal.

DR. BARROS-BAILEY: Well, I think if you put "optimally" in, it assumes the counter. This is Mary.

DR. WILSON: Yes. This is Mark Wilson. I still am struggling with how an agency that is not a scientific agency is confronted with marginally a huge research project would be able to do this regardless of budget freezes, and things of that sort with no internal advisors. If somebody can help me with that, then I would --

MS. LECHNER: Mark, you can't --

DR. WILSON: I heard that, well, maybe the

Panel can fulfill this role. One, the Panel isn't going to be around forever. And secondly, we seem to be -- at several times our charter was described as advice, oversight; we're not doing it.

This is starting to sound a lot like the Panel would be both helping design plans, develop proposals, and then also sort of be in the role of evaluating them, which I think we have to say one or the other with regard to that. It can't be both.

My question, in terms of this sort of practicality concern, which I think is a very legitimate one; I share that. I am a very task oriented guy. I like to get things done as quickly as possible. But, again, without appropriate scientific oversight and documentation of same, how is anything that is going to be done going to be defendable?

MS. LECHNER: The question I have is whether one organization can develop, and another organization can provide oversight; and, you know, I don't know "A," how realistic that is for Social Security, you know -- the role that I would see the

Panel in is not developing research plans, but providing the oversight. If -- if it can't be done -- if the oversight can't be developed internally, and you can't have another contractor to do it, then, I think that would be a third option.

DR. BARROS-BAILEY: Okay. This is Mary. We have been on the recommendation now for about almost 40 minutes, and we have about 20 minutes left on our two hour call. And so what I would like to do is -- these are issues that seem to arise. Just reminding everybody that we are advisory. And so the recommendation as it stands, how SSA takes it, whether they make a decision to what extent it is internal in terms of scientific, what part of it is farmed out, I do tend to believe that there has to be some level of internal scientific expertise for the very reason that Mark pointed out. And also, that that team should include programmatic input. So those are my personal thoughts.

So given the recommendation as it stands, what I heard in terms of changes were taking that last paragraph and possibly making it a fourth

bullet. Was that correct?

DR. GIBSON: Make it a third bullet actually. Making it the third out of four.

DR. BARROS-BAILEY: Were there changes or points of disagreement?

DR. SCHRETLEN: This is David Schretlen. I have a question. On my -- the version that Shanan read aloud there are three bullets.

DR. BARROS-BAILEY: Right.

DR. SCHRETLEN: Then Tom suggested taking that final paragraph that begins with the word "finally," I thought, and make that a fourth bullet point.

DR. BARROS-BAILEY: Right, but it becomes bullet number three in that four bullet sequence.

DR. SCHRETLEN: Oh, I see. I see. Got it.

DR. GIBSON: We confused you, sorry.

DR. SCHRETLEN: You put it above what is now the third bullet.

DR. BARROS-BAILEY: Yes. I think to maybe clarify this a little bit more, instead of just having four bullets, maybe we could make them

numerical, because then we have sequence to them. So we could have the first bullets as one and two; the last paragraph as number three; and then what is currently bullet three, making that number four.

DR. GIBSON: I have a question still, an unanswered question about that last bullet if it's before "further developmental activities," what kind of implication does that have for that project that's just been awarded.

MS. KARMAN: Right. This is Sylvia. I think that's a good question. It may be that one could read before further development, is there anything that wasn't already in the works at the time?

DR. GIBSON: Right.

MS. KARMAN: On the other hand, if that is not clear and it's raising a question in Debra's mind, maybe raising questions in other people's mind, so perhaps we just take that out, and not say anything about timing. Saying it needs to happen, period.

DR. BARROS-BAILEY: How would it read?

MS. KARMAN: It would read --

DR. GIBSON: I can do it for you, Sylvia.

MS. KARMAN: Okay. Thank you.

DR. GIBSON: This is Shanan. "Prepare and make available to the Panel the overall project plan, including the attendant research plans for advice and recommendation; instead of reading, prepare and make available to the Panel the overall project plan, including attendant research plans for advice and recommendation before further development activities for the OIS proceeds.

DR. BARROS-BAILEY: It would just end at recommendation?

MS. KARMAN: Correct.

DR. GIBSON: Right, correct.

DR. BARROS-BAILEY: Okay. Other thoughts or general big areas of consideration or for the recommendation?

MS. KARMAN: Yeah, the third paragraph, last sentence. Did we get a clear sentence there, or is that something we're returning to, or?

DR. GIBSON: Going back to number three

before we get there. I have got a potential rewrite on that one too. I personally want to speak out against removing "before further developmental activities for the OIS proceed." I think we can assume that things, which are already in the works are going to continue to be in the works, particularly since once we -- if and when we past this recommendation it's still going to go out for public comment. So it's not even a finalized recommendation until it's been vetted; but I don't think that stops that.

And I personally think it's very important to the Panel that we have more information before things proceed, because we have been in some cases surprised by things that have proceeded as they have without us having knowledge. So I think that last phrase is vitally important.

MR. HARDY: This is Tom Hardy speaking. I would like to echo Shanan's concern. I would also note the language that is before the "further developmental activities for the OIS proceed. I think that kind of covers that past action, and

current action. I agree with everything Shanan says, and again, as somebody providing advice and recommendation my concern is that we take a look and provide advice and recommendation as we were asked to do by the Commissioner; and that is exactly what we were asked to do. I don't see a problem with maintaining that language.

MS. LECHNER: Yes. This is Deborah Lechner. I would agree with Shanan and Tom. I feel like -- one of the things when I went back and looked at the old road map, one of the things that I particularly liked about it is that there were places where bullets were inserted panel deliberation, blah, blah, blah, may give feedback, makes recommendations; and that was part of the plan.

And I think somewhere along the way that iterative back and forth interaction between the Panel, and the -- and the projects, and RFPs that have been developed, I think we have kind of gotten -- that iterative back and forth process has gotten lost.

Sometimes I think due to urgencies of --

deadlines -- internal deadlines, internal pressures -- and I understand all those things, and really, you know, empathize, you know, with SSA about that; but just -- just from my past experience and being on advisory panels in general, what I have seen be very problematic is that the RFPs are not well written. And so that the Agency that's awarded the contract doesn't deliver a good product, because they were never really forced to by the RFP, if you will. So I think even in developing RFPs at this point without an internal scientific group SSA needs our collective input.

So I just think there needs to be points along the way that are planned out that -- where our input is sought.

DR. BARROS-BAILEY: I think part of the difficulty with some of those other external things, or things that went internally is that we didn't have clarification from OIG, I think it was, until Memphis, until June that we could ask -- special government employees could have access to some documents that didn't go out to the public before it

was released. So I think SSA had in some regards some difficulty including us in some of the RFPs, but that's been clarified going into the future.

Other main areas in terms of change? So to that last sentence of the third paragraph.

DR. GIBSON: This is Shanan. Let me offer another wording suggestion here.

DR. BARROS-BAILEY: Okay.

DR. GIBSON: Beginning with after the "comma," it is critical that all intended research protocols be developed with oversight by internal scientists, well-versed in research methods and programmatic specialists and be reviewed by the Panel prior to data collection.

DR. BARROS-BAILEY: Say that again.

MS. LECHNER: I have a question. Which paragraph are we wordsmithing?

DR. GIBSON: The one with the internal scientists, Deborah, sorry.

DR. BARROS-BAILEY: It's two paragraphs down from all the bullets.

MS. LECHNER: I got it.

DR. GIBSON: Beginning with, "to meet SSA user needs, maintain stakeholder confidence, and ensure legal defensibility, it is critical that all intended research protocols be developed with oversight by internal scientist well-versed in research methods and programmatic specialists, and be reviewed by the Panel prior to data collection.

DR. BARROS-BAILEY: I think that does it.

DR. SCHRETLEN: Yeah, I think that's great.

MS. KARMAN: Okay.

DR. BARROS-BAILEY: So any other changes? Any other major issues to deliberate upon for the proposed recommendation?

DR. SCHRETLEN: Yes, this is David Schretlen.

DR. BARROS-BAILEY: Okay.

DR. SCHRETLEN: First of all, because I wasn't at the Boston meeting, I want to say thank you, Shanan. I think this is terrific. For everyone who worked on it, I really like this document a lot.

My one concern about what is now bullet point number four, which is "make public the

aforementioned project and research plans, thus, delineating how the Agency plans to proceed in its efforts to develop said OIS." My one concern about that is the implication of this -- that by making this public that we're soliciting input from, you know, stakeholders, and this advocate organization, and that advocate organization.

My concern is that could not only cause SSA to pause and reflect, but to get mired down for a very long time in dealing with, you know, criticism and input from people who don't have scientific background.

DR. PANTER: Right. This is Abigail Panter. I have another kind of sort of related to the last bullet is that it could be also that too much information about a research project can be derail the project. Just to be aware of it. Maybe the hypothesis to know -- in case that could be one of the unintended consequences of doing this could be that too many people know what the hypotheses are, and too much about the study before it's done.

DR. BARROS-BAILEY: Would it be maybe

appropriate to add a language in there that the appropriate level of aforementioned projects that, you know, they need to know the details in terms of the hypotheses or just in general what the project plan is.

DR. SCHRETLEN: I'm just asking the question -- that was Mary, right?

DR. BARROS-BAILEY: Yes.

DR. SCHRETLEN: I am just asking the question, what is -- why is that bullet point there? What is the aim of making it public? Are we making it public because we're inviting criticism from the public? I mean, are we just going to say, this is what we're going to do and we don't care what anyone tells us about it, because this is what we're going to do?

MR. HARDY: This is Tom speaking. I worked on some of the drafting of this language. And I'm glad you are bringing this up, because it does give me some pause and allows me to think a little further. My understanding as part of the workgroup when we started this was as part of the user needs

group, and as part of our charge under Sunshine laws, and all those wonderful things is to make sure people are aware of what's going on, to -- to give the general public -- not only ourselves, but the general public a kind of view of where we're going, what we're doing and how methodically we are approaching the system.

As of this point if you are somebody out there listening, you really don't know where we're going. You really don't have anything to say, this is the next step; this is what we are looking at. We have kept this in mine. We're planning on looking into that.

I saw this -- and Shanan and other members can correct me in saying say, yes, we need to make sure that as we move forward to meet many different reasons, we need to make sure that the general public is also aware of what's going on, so there is no concerns on that point.

As far as changing this to a deeper level, which is talking the hypotheses that are going to be investigated, I have not thought about that, because

I'm not a researcher. I'm not sure what a good response to that is, but I think we can still meet the charge to the Panel, which is to make this information known to stakeholders and the world at large without necessarily messing up the scientific research, per se.

I don't know how you would legally put that in here without making this suddenly an extremely long document. My concern is I think we have got a tight document right now that has basically three pieces that we would like to recommend to Social Security, and it is an iterative document, much like ground if we start with step one, work through step one and work with the Agency, and move into step two, move into step three, and then move into step four with advice and recommendation on how to achieve that goal without necessarily tipping the hand regarding hypothesis we could probably do that.

But if we try to wordsmith it -- I'm a lawyer, and I can tell you we could end up with a very, very long document. I think in some ways

we're asking people to trust us. We need to trust SSA and trust ourselves too before we start tying ourselves down with legalese that is going to make it impossible for us to have a document at all.

DR. BARROS-BAILEY: Tom, I think I heard two things coming out of your discussion. One of them is that the intent of that bullet was to have the public aware of what generally the plans are, and -- and where people are -- where the project is along that process, not the project plans themselves. So it's more of a reporting, rather than the plans themselves. And I think that's probably the red flag that went up for Abigail and David. So it's the reporting of where are we. Generally, where do we plan on going, not the document in and of itself.

DR. PANTER: Yes, I don't think that's what this says, though.

DR. GIBSON: This is Shanan. Can I comment? I wanted to kind of elaborate on how I read number four regarding it. It really builds on what Tom said.

There are many user comments that

basically accuses SSA of having ulterior motives in developing this OIS. There were many user comments that said, you lack the expertise to develop and execute this research. So for me this bullet is, one, about ensuring transparency, which is something we discussed very much. I think it's vitally important that we be transparent with the stakeholder involved in order to maintain the good will and support that we have had the benefit of up until now.

Secondarily, I think to some degree the actual publication of the project and research plans. Although, certainly I would agree with Abigail, not in the detail of here are hypotheses, and here -- you know here is our "P" value kind of thing. Also help address the nay sayers that say you are covertly doing this for motives which are inconsistent with the good will, or of the good of the public; and also shows that you are legitimately taking this on as a serious research project and going through the process correctly. Again, this is about process planning. I think making that

planning transparent is very important.

MS. LECHNER: This is Deborah Lechner. I would agree with Shanan. I think transparency is -- we might as well hear the criticisms before than after. Because we're going to hear them regardless of when we reveal all of these projects, and -- project and research plans.

DR. HUNT: This is Allan. I agree also. I think it is vital to the credibility of the whole effort. Unfortunately, there is suspicion out there about SSA's motive. So I think it's really important that we make this as transparent as possible.

MS. HOLLOMAN: This is Janine. I can tell you the native comments both on and off their internal talk net were mild by comparison to Shanan's description about some people's feeling about what that process is all about. I agree that the more transparent we make it, the better.

I do want to apologize, that was my dog. He has apologized.

DR. BARROS-BAILEY: So this is Mary. What I'm hearing -- and Abigail and Dave, maybe you could

correct me if I'm wrong; but what I'm hearing from the majority of the Panel members is that the current bullet three that will become four, "make public the aforementioned project and research plans, thus delineating how the Agency plans to proceed in its efforts to develop said OIS," would be retained as worded.

DR. GIBSON: That would be my preference. This is Shanan.

MR. HARDY: This is Tom. All I can hear is if we say, no we want to keep it a secret plan? I have issues with that. I think it speaks for itself.

MS. LECHNER: This is Deborah, I agree.

DR. SCHRETLEN: This is David I completely agree with the transparency issue. I wasn't suggesting eliminating that. I was asking a question. And the question is whether or not in the implication of that bullet point, is that we are soliciting input, and that that input will inform in any way the design, you know, of a project plan or a research plan?

And I wanted to point out that if that --

if we wanted to formally recommend that, that could potentially slow the process enormously. But if what we're saying with bullet point number four is that we're simply going to make it known publicly what we're doing, I'm -- I think that's a laudable recommendation. And I'm all for that kind of transparency.

MR. HARDY: This is Tom. Can I respond to that? I think what the intent is, is to make this public; and we, as a Panel, have always been open to any advice or recommendation from the public. I don't think at this point we're soliciting comments. But I also think that if a comment were received, it was oh, my gosh, silly people you missed this; we would certainly pay attention if that was the correct comment.

I don't see it yet as a formal notice out there, but all of our documents go out to the public, and all of our documents are there, and the public can comment on things. I don't see that as bad per se, but I don't see us as recommending this as being a formalized process in this

recommendation.

DR. SCHRETLEN: Sounds good.

DR. BARROS-BAILEY: We are nearly two hours into this process. So what I'm going to ask Shanan to do, because I know she has been keeping track of the wording, is to reiterate the four bullets as they are. Remember that the way we are coming at any proposed recommendation is that we will decide as a group whether to concur with the proposed recommendation. It will go out to public comment in terms of the Federal Register. The minimum amount of time we can do a public comment is two weeks. And we will receive feedback from that public comment, and we will revisit this.

And so I mentioned earlier that I intend on having a teleconference probably around the week of the 15th of November so that we could have the opportunity to review any public comment if we still choose as a Panel to go ahead with this proposed recommendation; and we can maybe take a look at some of these other issues that we have been discussing over the last hour that might also be a points of

confusion for the public.

So, Shanan, if you would go through and -- and read the four bullets, and any other change to the document -- the original document we got at the start of this discussion.

DR. GIBSON: I will. The OIDAP Panel strongly recommends that SSA, one, take the immediate step to develop an overarching project plan and timeline that specifies SSA's needs and objectives with regard to occupational information.

Two, develop a fully articulated research plan and associated processes that provide for the coordination of necessary scientific research and allow for the incorporation of findings and results as appropriate.

Three, prepare and make available to the Panel the overall project plan, including the attendant research plan for advice and recommendation before further developmental activities for the OIS proceeds.

Four, make public the aforementioned project and research plan, thus delineating how the

Agency plans to proceed in its efforts to develop said OIS.

Skipping the next paragraph. The second paragraph after the bullets. To fulfill the requirements of aforementioned project plan, SSA must also develop and make public a scientifically sound research plan that addresses the needs delineated by the project plan and that will guide the entire OIS development process. To meet SSA user needs, maintain stakeholder confidence, and ensure legal defensibility, it is critical that all intended research protocols be developed with oversight by internal scientist well-versed in research methods and programmatic specialists, and be reviewed by the Panel prior to data collection.

DR. BARROS-BAILEY: Okay. Thank you, Shanan. Then I'm going to call the question, and call for a vote.

The way we will go about doing this is if -- I will take a motion from the floor for the acceptance of the proposed recommendation as just read by Shanan.

DR. WILSON: This is Mark Wilson, so moved.

DR. BARROS-BAILEY: Is there a second?

MR. HARDY: This is Tom Hardy. I will second the motion.

DR. BARROS-BAILEY: And Debra, if you would go through the roll call, and take each person's individual vote on that. I wonder if Debra --

MS. TIDWELL-PETERS: I'm here, Mary.

DR. BARROS-BAILEY: Okay. Sorry.

MS. TIDWELL-PETERS: Robert Fraser.

DR. FRASER: I concur.

MS. TIDWELL-PETERS: Shanan Gibson.

DR. GIBSON: I concur.

MS. TIDWELL-PETERS: Tom Hardy.

MR. HARDY: Concur.

MS. TIDWELL-PETERS: Janine Holloman.

MS. HOLLOMAN: I concur.

MS. TIDWELL-PETERS: Allan Hunt.

DR. HUNT: I concur.

MS. TIDWELL-PETERS: Sylvia Karman.

MS. KARMAN: I concur.

MS. TIDWELL-PETERS: Debra Lechner.

MS. LECHNER: Concur.

MS. TIDWELL-PETERS: Abigail Panter.

DR. PANTER: Concur.

MS. TIDWELL-PETERS: David Schretlen.

DR. SCHRETLEN: I concur.

MS. TIDWELL-PETERS: Mark Wilson.

DR. WILSON: I Concur.

MS. TIDWELL-PETERS: And Mary Barros-Bailey.

DR. BARROS-BAILEY: The Chair doesn't specifically vote, so at this point I won't be voting on it; but I will reflect that the motion passed unanimously, that we have a proposed recommendation due to our public comment process. I would ask that Debra work with us in terms of putting the proposed recommendation and the wording out in the Federal Register.

I would propose that we do it for the minimum period of two weeks unless there is some discussion on that, so that we could get the information from the public as soon as possible, and be able to vote on the formal recommendation at our

November teleconference.

Any discussion in terms of the time period for the public register?

Okay. Thank you all. It was a wonderful discussion on the proposed recommendation, and also it will be interesting to see how our new public comment process in terms of future recommendations will work going through this.

I want to thank the ad hoc group, and Shanan as our leader for that group in terms of the hard work that went into this recommendation for all the thoughts that were brought into this very thoughtful discussion. I think this will be very helpful, particularly where the project is, and the Panel is at this juncture.

Sylvia, I understand that you wanted to bring something back on to the agenda in terms of the report.

MS. KARMAN: Yes. I think -- the more I'm thinking about it, we would be -- I'm thinking that we really need to have tab "B in" the summary of public comment report actually reflect only public

comments; and if that requires our team go through and pull them out we will do that; but that's what I think we need to do.

DR. BARROS-BAILEY: It doesn't change the reports itself. It just accurately reflects that it is public comment, and it isn't under user needs or the Panel.

MS. KARMAN: Correct.

DR. BARROS-BAILEY: Because it's being responsive to the Panel --

MS. KARMAN: Correct.

DR. BARROS-BAILEY: -- report. I mean, that's the reason for the public comment. Does that make sense? Anybody have any concerns about that? Just that tab "B" of the public comment report just reflect public comment.

DR. HUNT: This is Allan. So you mean, you would take it out completely; not use, I don't know, some sort of asterisk or something to footnote the fact that it came from users needs?

MS. KARMAN: No. What I mean is there are comments -- if you go through that whole list, there

are some bulleted items that came from or can be tracked back to either Panel recommendation or user needs analysis results. So what you would end up with is a tab "B" with a whole bulleted list that are grouped by recommendations where none of the bullets reflect anything but public comments.

DR. BARROS-BAILEY: Allan, just kind of a history where tab "B" came from that might be helpful was the staff integrated everything, including user needs and the Panel's comment. When that was put into the public comment summary report it wasn't ferreted out that some of those were actually the Panel. So it looks like the Panel is giving public comment back to itself.

DR. HUNT: Right. Okay.

DR. BARROS-BAILEY: So it is just cleaning up that tab "B" for just public comment.

MR. HARDY: This is Tom speaking. This would just be in the Appendix B portion you would be taking that stuff out, right?

DR. BARROS-BAILEY: Yes. It would not change anything about the report, just cleaning up

tab "B" so it accurately reflects public comment.

MS. KARMAN: Correct, Tom -- this is Sylvia, Tom; that's correct. This isn't in addition to any of the other changes we talked about earlier. It doesn't change anything that, we as a Panel, already decided about in terms of revisions in the report.

MR. HARDY: Okay. Thank you for the clarification.

DR. BARROS-BAILEY: Okay. I think we are at the end of our meeting. This was a very fruitful meeting. I want to thank the Panel ad hoc group, the User Needs and Relations Subcommittee, Shanan leading both of those efforts to -- that comprise a huge part of today's agenda. There is a lot going on. This is not only a time for reflection, but I think a very exciting time for those of us on the Panel, and also probably for the project.

I started off the meeting by kind of trying to anchor us a little bit, and give us a little point of reflection of who we are, and what we are called to do. Anybody who has been involved

in this project or have been abreast of this project for as long as we have understand the importance of it back to the very first paragraph in terms of the proposed recommendations. And the essential criteria that we are -- have been asked to help Social Security meet its burden of proof with a system that is forensically defensible that reflects all work nationally, and importantly links residual functional capacity to requirements of work.

And we do that through our advisory role from the point of being independent, and SSA's -- legally in terms of giving us the independence; and a lot of what we talked about today was the transparency and the openness in our process.

I would like to thank the Panel, SSA staff, and all others listening in for being with us this morning. And we will get more information out as we get the dates for the November teleconference, the agenda for that teleconference, and also invite those who are wishing to attend our meeting in December that it will be in Baltimore on the 8th and 9th of December. Further information will be coming

out about that in that agenda as well.

So thank you all for your attendance this morning, and we will talk soon.

MS. KARMAN: Thank you. Good bye, everyone.

(Whereupon, at 12:09 p.m., the proceedings were adjourned.)

CERTIFICATE OF REPORTER

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

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

SIGNED this 5th day of October, 2010.

_____
STELLA R. CHRISTIAN