Occupational Information Development Advisory Panel

Findings Report:

A Review of the National Academy of Sciences Report

A Database for a Changing Economy:

*Review of the Occupational Information Network (O*NET)*

June 28, 2010

Report to the Commissioner of Social Security

OCCUPATIONAL INFORMATION DEVELOPMENT ADVISORY PANEL REVIEW OF

THE NATIONAL ACADEMY OF SCIENCES 2010 REPORT
*A DATABASE FOR A CHANGING ECONOMY: REVIEW OF THE OCCUPATIONAL INFORMATION NETWORK (O*NET)*

Executive Summary

Based on a January 2010 request from the Social Security Administration (SSA), the Occupational Information Development Advisory Panel (OIDAP or Panel) reviewed the National Academy of Sciences (NAS) report, *A Database for a Changing Economy: Review of the Occupational Information Network (O*NET)*,[1] for relevance and lessons learned useful to SSA's development of an occupational information system (OIS) to replace the aging *Dictionary of Occupational Titles* (DOT) in the disability adjudication process. The OIDAP describes the background of the request, the OIDAP methodology for reviewing the O*NET Report, its findings and lessons learned, and offers SSA areas for consideration.

Common Ground: NAS Panel and OIDAP Areas of Agreement

1. **The NAS panel's review of the use of the O*NET in disability adjudication reached the same conclusion as that of other national governmental bodies, the OIDAP, and SSA in that the O*NET in its current form is not suitable for disability adjudication.[2]** (See pp. 7-8 of this report)

2. **The NAS and OIDAP reports reached the common conclusion that significant changes would need to be made to the O*NET in order for it be suitable for disability adjudication.** For example, changes to the O*NET content model, the Behaviorally Anchored Rating Scales (BARS), and the level and unit of analysis would all be required. These changes would involve a costly revalidation of the entire O*NET system and have the potential of negatively impacting the ability of the O*NET to serve the purposes for which it was designed. (See p. 8 of this report)

3. **The O*NET Report included a variety of important conclusions regarding occupational database maintenance that were similarly reached by the OIDAP for the OIS's development including:**

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[1] Given how past and current studies of occupational databases are referred to by the audiences who may read this report, the OIDAP has chosen to refer to the O*NET review as being conducted by the NAS not by the National Research Council as it is also sometimes referenced.

[2] p. 161, National Academy of Sciences (NAS) report, A Database for a Changing Economy: Review of the Occupational Information Network (O*NET),

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- **focusing on collecting, maintaining, and publishing high-quality data;**
- **considering input from the scientific and user communities on the research and usability processes;**
- **developing plans and procedures for refreshing the occupational database;**
- **using technology for communication or for the delivery platforms to users; and,**
- **exploring the use of Internet-based methods for developing an online user community.** (See p. 9 of this report)

4. **The NAS staff deferred to the expertise of the OIDAP for SSA's occupational data needs**. The NAS panel did not contain a subject matter expert in SSA disability adjudication, in private sector disability adjudication needs, or in the use of occupational information in disability applications in general. (See pp. 9-10 of this report)

Going Forth: OIDAP Areas of Future Exploration

5. **The application of O*NET in SSA's disability adjudication process would require SSA to change its definition of "skills" as well as the way skills are assessed in SSA's disability programs.** The manner in which O*NET defines skills and conceptualizes skills transference conflicts with SSA's disability program requirements, its regulatory definition of skills, and the regulatory rules by which skills are considered in disability claims. (See pp. 10-11 of this report)

6. **The O*NET is a general purpose database addressing the needs of the primary users (e.g., workforce development, economic development, career development, academic and policy research) for which it was designed. The disability adjudication data needs and purposes are very different and not a subset of the general purpose database.** (See pp. 11-16 of this report)

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7. **The O*NET Report did not articulate the evaluation criteria that the NAS panel may have used for its evaluation of the O*NET.** (See p. 16 of this report)

8. **The forensic defensibility of using O*NET data for disability adjudication was not addressed by the NAS panel.** (See pp. 16-17 of this report)

Considerations[3]

Based on these findings, and our review of the O*NET Report in general, the OIDAP upholds its September 30, 2009 recommendations to SSA. The OIDAP further advises that SSA should consider:

Internal Expertise Unit

1. **Cautious progress on the R&D agenda for the OIS until the scientific expertise unit recommended by the OIDAP in its September report has been established.** As noted in the O*NET Report, developing a research agenda and its priorities would be advisable.

Information Sharing with Other Government Agencies

2. **Continued and expanded SSA and DOL cooperation on mutually beneficial areas, such as sampling and/or data collection. This cooperation may include examining how DOL has historically developed and used occupational data for its own labor-related adjudicative needs.**

3. **Collaboration with other Federal agencies, such as the Department of Defense, Office of Personnel Management, Rehabilitation Services Administration, and the Census Bureau, regarding work analysis methods or other studies, surveys, or information of value to the development of the OIS.**

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[3] See pp. 17-18 of this report for discussion.

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*Ethical and Legal Concerns Regarding O*NET and DOT*

4. **Consideration of potential ethical and legal concerns that might arise from repurposing O*NET or by pursuing an update to the aging *Dictionary of Occupational Titles* framework for use in the disability adjudication process.**

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Introduction

At the OIDAP's inaugural meeting, Commissioner Astrue requested that the Panel provide the SSA with its content model and classification recommendations by the end of FY 2009. The Panel delivered the *Content Model and Classification Recommendations for the Social Security Administration Occupational Information System* report to Commissioner Astrue on September 30, 2009.[4]

As the OIS project transitioned into the research and development (R&D) phase, a January 19, 2010 letter from Commissioner Astrue requested further advice and recommendations from the OIDAP regarding the:

1. development of sampling and data collection plans for R&D;
2. creation of a process for recruiting job analysts, including methods for certification criteria and training;
3. assistance in establishing associations between human function and the requirements of work; and,
4. review of relevant documents or reports SSA identifies that may affect or inform its work on the OIS.

This report addresses a request made by SSA at the January 2010 quarterly meeting that the OIDAP review the NAS report, *A Database for a Changing Economy: Review of the Occupational Information Network (O*NET)* [5] (herein referred to as the "O*NET Report"). The purpose of the review was to examine data quality, sampling, and other issues that might be useful to the development of SSA's OIS.

The O*NET Report also contains topics that may be helpful to future OIS R&D activities. Thus, these technical topics will be addressed in subsequent OIDAP reports as appropriate, such as in the areas of measurement, sampling, data collection, and evaluation metrics.

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[4] Because of the OIDAP's Federal Advisory Committee Act status, subcommittees do not recommend directly to SSA, but to the OIDAP. These recommendations are deliberated and voted upon by the entire Panel. The subcommittee reports contained in the OIDAP's report appendices were finalized on September 1, 2009 for Panel deliberations and voting on September 16-17, 2009. Therefore, the recommendations by the OIDAP to Commissioner Astrue on September 30, 2009 are in the *Final Report and Recommendations* section, or the first 68 pages of the report, not in the appendices. The recommendations for the content model data elements were meant as a starting point for further development and refinement by SSA through the R&D process. The OIDAP report can be retrieved from http://www.ssa.gov/oidap/panel_documents.htm
[5] O*NET Report, Retrieved from http://www.nap.edu/catalog.php?record_id=12814

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Background

A decade after the release of the O*NET, the Employment and Training Administration of the US Department of Labor (DOL) commissioned a review of the database by the NAS. This was the first time in three decades that an independent body reviewed a civilian occupational information database in the United States since the NAS conducted a similar review of the DOT in 1980.[6]

The OIDAP applauds the DOL for opening the O*NET to user, stakeholder, and public review and critique. The process can only serve to strengthen the database for the workforce development and similar purposes for which it was primarily developed.[7]

*OIDAP Methodology for Review of the O*NET Report*

The Prepublication Copy/Uncorrected Proofs of the O*NET Report were released by the NAS to the public on December 4, 2009. On January 8, 2010, in their professional roles outside of the OIDAP, two Panel members (Mary Barros-Bailey, PhD and Mark Wilson, PhD) met with the NAS O*NET study staff to clarify factual inaccuracies in the O*NET Report. In addition, two Social Security Administration staff (Associate Commissioner Richard Balkus and Occupational Information Development Project Director Sylvia Karman) met with the NAS staff on January 12, 2010 to provide information regarding the disability adjudication process that was inaccurately reflected in the O*NET Report. At both meetings, the NAS staff indicated that only factual inaccuracies could be corrected because the O*NET review panel had already disbanded.

At the January 22, 2010 OIDAP quarterly meeting, the Panel discussed inviting NAS staff to present their findings at the next OIDAP meeting based upon SSA's request to the OIDAP to review the O*NET Report. Between quarterly meetings, the OIDAP Chair requested that the Panel review the O*NET Report in its entirety in preparation for a presentation by NAS staff at the next March quarterly meeting.

On March 25, 2010, Ms. Margaret Hilton, Study Director, and Mr. Tom Plewes, Associate Study Director at the NAS for the O*NET panel, presented to the OIDAP.

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[6] This report is often called the "Miller Study." Retrieved from http://www.nap.edu/openbook.php?record_id=92&page=R1
[7] pp. 12, 24, 25, 36, and 37, Appendix B.

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See Appendices A and B for the NAS presentation materials and transcript. The final O*NET Report became available to the public and to the OIDAP on May 11, 2010. The preliminary report drafted by the OIDAP Chair was reviewed by the Executive Subcommittee on June 9, 2010 and deliberated upon by the full Panel on June 10, 2010.

A Word about Timing

An important insight arising out of the March 2010 presentation by Ms. Hilton and Mr. Plewes centered on the timing of the O*NET panel's deliberations and recommendations that were completed by the end of April 2009,[8] or five months before the OIDAP September 30, 2009 report was available.[9] Indeed, the NAS panel had disbanded by August 2009 – when their report entered NAS's internal review process. The O*NET Report was not released in the prepublication format until nearly three months after the dissemination of the OIDAP report. The timing of both panel processes and reports could lead to the mistaken impression that the NAS panel took OIDAP's findings and recommendations into account when it actually did not.[10]

The NAS staff referenced the OIDAP report and recommendations as an attempt to be complete in the literature citing;[11] however, the technical working papers and other research considered by the OIDAP, as well as the OIDAP report and recommendations, were never read or considered by the O*NET panel in its deliberations or when arriving at its recommendations. The NAS staff clarified the timing and referencing of the OIDAP report when presenting in March 2010 and via a footnote[12] in the final copy of the O*NET Report. Ms. Hilton indicated that, should the NAS panel have considered OIDAP's findings, these would presumably have affected their conclusions.[13] For a timeline of each panel's process, see Appendix C.

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[8] p. 61, Appendix B.
[9] pp. 60, 129, and 130. Appendix B.
[10] pp. 16, 130-131, and 146, Appendix B.
[11] p. 61, Appendix B.
[12] p. 161, O*NET Report.
[13] p. 62, Appendix B.

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OIDAP Findings

Review of the O*NET Report by the OIDAP resulted in eight general findings that are detailed in this section.

Common Ground: NAS Panel and OIDAP Areas of Agreement

FINDING #1: The NAS panel's review of the use of the O*NET in disability adjudication reached the same conclusion as that of other national governmental bodies, the OIDAP, and SSA in that the O*NET in its current form is not suitable for disability adjudication.

Pages 11 and 12 of the OIDAP report identify the occupational data requirements of SSA's disability programs including the need to:

1. reflect national existence and incidence of work;
2. reflect work requirements;
3. be legally defensible; and,
4. meet the following technical, legal, and data requirements:
   a) occupations aggregated at a level to support individualized disability assessment;
   b) a cross-walk to the Standard Occupational Classification;
   c) precise occupationally-specific data;
   d) core work activities;
   e) minimum levels of requirements needed to perform work;
   f) observable and deconstructed measures;
   g) a manageable number of data elements;
   h) sampling methodology capturing the full range of work;
   i) inter-rater agreement justifying data inference;
   j) data collection of high quality data;
   k) valid, accurate, and reproducible data;
   l) whether core work activities could be performed in alternative ways; and,
   m) terminology that is consistent with medical practice and human function. [14]

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[14] See SSA working papers *Developing an Initial Classification System* and *Social Security Administration's Legal, Program, and Technical/Data Occupational Information Requirements*. Retrieved from http://www.ssa.gov/oidap/panel_documents.htm and also see p. 50, Appendix B.

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The NAS panel did not consider these occupational data needs for SSA's programs, as confirmed in their staff's presentation to the OIDAP in March 2010.[15] Like SSA and many other independent and government bodies that have previously arrived at the same conclusion (General Accounting Office, 2002a, 2002b; Institute of Medicine, 1998, 2002; OIDAP, 2009; Social Security Advisory Board, 2001), the O*NET Report[16] agrees that "… disability determination was an important use of the DOT and because O*NET was created to replace the DOT, it seems fair to conclude that O*NET has failed to replace the DOT in this particular usage." (p. 161, O*NET Report)

The NAS staff added that, "… we didn't look in-depth at this whole disability question. We took a quick look, and we thought it needed further study."[17]

FINDING #2: *The NAS and OIDAP reports reached the common conclusion that significant changes would need to be made to the O*NET in order for it be suitable for disability adjudication.*

Both the O*NET Report and the OIDAP conclude that a variety of measurement and scaling issues of descriptors in O*NET would be highly problematic for disability adjudication. The NAS staff and the OIDAP specifically focused on the application of BARS within the O*NET during the March 2010 NAS presentation.[18]

The O*NET Report correctly identifies the problematic issues (e.g., dichotomous definitions, complex terminology, confounded difficulty levels, no clear continuum, etc.)[19] associated with BARS in general, and specific to disability adjudication.[20] However, the staff could not identify a way in which these BARS could be changed with disability adjudication occupational information needs in mind without revalidating the entire O*NET database that cost $75M over the last dozen years, not including the cost of its development.[21] Neither could we. Future costs associated with the disruption this redesign would have upon the primary users identified by the O*NET's mission is incalculable. To the extent that SSA would

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[15] p. 50, Appendix B.
[16] p. 161, O*NET Report.
[17] p. 78, Appendix B.
[18] pp. 30, 67-76, and 110, Appendix B.
[19] pp. 63, 74, 75, 76, 87, 166, 177, 196, O*NET Report.
[20] p. 30, Appendix B.
[21] pp. 69, 71, and 110, Appendix B. Note that on p. 71, Mr. Plewes indicated, "I don't believe you can fundamentally change the anchors and retain the system as it is. But the panel didn't look at that." The discussion on p. 110 indicates how changing the problematic BARS would mean having to revalidate the ratings across the entire O*NET system.

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consider the use of BARS, it would need to ensure when and how BARS would be suitable for an OIS developed for disability adjudication.

FINDING #3: The O*NET Report included a variety of important conclusions regarding occupational database maintenance that were also similarly reached by OIDAP for the OIS's development including:

- *focusing on collecting, maintaining, and publishing high-quality data;*
- *considering input from the scientific and user communities on the research and usability processes;*
- *developing plans and procedures for refreshing the occupational database;*
- *using technology for communication or for the delivery platforms to users; and,*
- *exploring the use of Internet-based methods for developing an online user community.*

FINDING #4: The NAS staff deferred to the expertise of the OIDAP for SSA's occupational data needs.

The NAS panel did not include a subject matter expert with a specialty in disability adjudication in the private or public sectors,[22] or in particular to SSA's disability program needs. On March 26, 2009, Ms. Sylvia E. Karman, the Director of the Occupational Information Development Project, presented to the NAS panel about the need for occupational information in SSA's disability programs.[23] Beyond the one-hour presentation, the NAS panel did not review or consider other currently-available working papers or reports specific to the occupational information needs for disability adjudication; therefore, during the March 2010 presentation to the Panel, the NAS study staff deferred to the OIDAP for expertise in the use of occupational information as pertinent to the disability adjudication process.[24]

The O*NET Report's first recommendation in Chapter 8 called for the development of an interagency task force whose first order of business would be to study SSA's occupational information needs. According to Mr. Plewes, this recommendation has

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[22] p. 16, Appendix B.
[23] p. 160, O*NET Report.
[24] pp. 33, 55, and 59, Appendix B.

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already been performed by the OIDAP's review.[25] Based on the review of SSA's needs, the OIDAP voted unanimously in 2009 that a new OIS was needed to replace the DOT in disability adjudication. O*NET was not recommended as that replacement.

Going Forth: OIDAP Areas of Future Exploration

FINDING #5: The application of O*NET in SSA's disability adjudication process would require SSA to change its definition of "skills" as well as the way skills are assessed in SSA disability programs.

The NAS panel cited various conflicting and confounding definitions of skills within the O*NET content model.[26] Broad conclusions regarding transferability of skill may make sense for the primary users of O*NET data, such vocational rehabilitation counselors who may need to consider broad brushstrokes of occupational information as a starting point in the vocational exploration process to which they may add other information (e.g., results of psychometric assessments or employer contacts) when developing a rehabilitation or return-to-work plan that may include educational or other vocational interventions to develop a client's or evaluee's vocational potential. However, the same conclusions are contraindicated for disability adjudication. For example, the O*NET Academy[27] describes a transferability of skill tool called TORQ that was used in Indiana to assist laid off workers in exploring skills transference to other work. The podcast describes a case of a recreational vehicle team assembler and finds transferability of skill to the work of a dental hygienist. This conclusion of transferability of skill is highly problematic for SSA as its process does not allow for considering retraining, accommodations, or other vocational rehabilitation interventions in disability adjudication.[28] The NAS panel did not consider transferability of skill within the disability adjudication process or how the design of the O*NET could results in data that could be highly problematic for work experience and transferable skills analyses at Steps 4 and 5 in the sequential evaluation process.[29]

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[25] p. 33, Appendix B.
[26] p. 32, O*NET Report.
[27] O*NET Academy is accessible at http://www.onetacademy.com/faq/contentpartner.cfm
[28] pp. 116-117, and 120, Appendix B.
[29] p. 117, Appendix B.

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The treatment of skills and skills transferability with the use of a general purpose database such as the O*NET could potentially result in inaccurate decisions and increased denials in the sequential evaluation process. Again, the O*NET was not designed to meet disability adjudication needs. Changing the O*NET for disability adjudication needs would make it problematic as a tool for the purposes for which it was created and where this kind of transferability of skills method may be helpful.

With respect to the issue of skills and skills transference in its September 2009 report, the OIDAP recommended data elements to include in the content model and data collection effort that best fit with the disability adjudication process. Specifically, by its recommendations, the OIDAP attempted:

> to distinguish the essential components of the definition of what a skill is and how a skills analysis or work experience analysis is performed and [to] separate them into those elements or processes for which occupational data could be gathered. By doing so, we are able to study the resulting data collected vis-à-vis current paradigms of how skills transfer or could transfer, as well as to provide the opportunity to potentially explore other methods that might result in greater face and predictive validity that are based on empirical data. We note that SSA uses the "transferability of skills analysis" at Step 5 in very limited circumstances. We mean to include the consideration of an individual's ability to do past work or other work as currently conceived by SSA (unskilled, semi-skilled, or skilled).[30] (p. 48, OIDAP Report)

FINDING #6: The O*NET is a general purpose database addressing the needs of the primary users (e.g., workforce development, economic development, career development, academic and policy research) for which it was designed. The disability adjudication data needs and purposes are very different and not a subset of the general purpose database.

Different Missions, Different Users

The assumption that the creation on an OIS would be parallel, duplicative, or redundant[31] to the existence of the O*NET is incorrect and does not consider the

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[30]20 CFR 404.1568(d) and 416.968(d) for SSA definition of skills and transferability of skills.
[31] p. 161, O*NET Report.

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differing missions, user needs, purposes, or other design considerations of each occupational database. The NAS panel inferred the O*NET's mission as DOL needing to "[m]eet the competitive labor demands of the worldwide economy by enhancing the effectiveness and efficiency of the workforce development and regulatory systems that assist workers and employers in meeting the challenges of global competition." (p. 6, O*NET Report). On the other hand, the mission of SSA's OIS is to provide specific physical and mental job demands and measures that are directly related to SSA's evaluation of limitations resulting from disability claimants' impairments.

Consequently, unlike the OIS that is being developed by the SSA specific to one purpose – the disability adjudication process and the users specific to that system – the first paragraph of the O*NET Report states that the O*NET was developed by the DOL not only for use within some of its programs, but also for many users in the national economy identified as:

- workforce development
- economic development
- career development
- academic and policy research
- human resource management[32]

Because of the many users for which the O*NET content model was designed, its development of its design took considerably longer than is anticipated for the OIS's development. O*NET users utilize the general purpose[33] data as the starting point within their processes upon which further research and information may be required whereas the OIS needs to provide very specific information to assist decision-making at the n=1 level.

Different Purposes and Needs: Econometric v. Ergometric System Designs

Understanding the occupational data needs of specific users is important to concluding whether the O*NET fits that need well. For example, a RAND

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[32] The O*NET Report states, "a primary goal of O*NET is to help state workforce development offices carry out their dual mission of assisting individuals in gaining challenging, rewarding work (and any required education and training) and assisting employers in recruiting, hiring, and developing skilled workers." p. 6. Also see pp. 12, 24, 25, 36, and 37, Appendix B.
[33] pp. 23, 25, 27, 29, 70, and 81, Appendix B.

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Corporation study (Hansen, Campbell, Pearlman, Petho, Plewes, & Spenner, 2008) assessing the development of a common framework for the various military occupational information systems[34] concluded that:

> … no single existing system is likely to be fully appropriate for DoD's needs …. All of the existing systems …, including the O*NET, provide information that is too general and abstract. If DoD wishes to develop a uniform [occupational analysis] system applicable across the services, their components, and the civilian workforce, the need to build the system in-house seems inescapable. This is the only way it could be substantively meaningful to users and stakeholders. [35] (p. 20, Rand Report)

The O*NET Report and the 2008 report by the RAND Corporation both indicated that the design of an OIS is specific to its purpose. The RAND report best describes this initial and crucial decision in the development of any occupational database when it states:

> A major requirement for choosing among occupational analysis system options is understanding, in fairly specific terms, the objectives or purposes to be served by the system. Indeed, this understanding is needed before any truly meaningful discussion of key underlying systems concepts and issues can occur.[36] (p. xiii, Rand Report)

Further, the RAND panel posited:

> When considering alternative [occupational analysis] systems … there are no unequivocally "right" or "wrong," or "better" or "worse," choices in the absence of specification of the system's intended purposes and applications. Each type of process, job descriptor category, and level of analysis has utility for different purposes and is therefore relatively more or less suitable for different applications. Specification of such purposes is in turn a function of the particular needs of potential users. Consequently, such needs must also be

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[34] According to the RAND study, "The Army, Navy, Air Force and Marine Corps have separate occupational systems for their officers and enlisted workforces while the civilian workforces follow the patterns of the federal workforce and use that occupational system. As a result, DoD uses over 15 different occupational systems with over 6,000 occupational definitions." (p. 32)

[35] RAND report. Retrieved from http://www.rand.org/pubs/technical_reports/2008/RAND_TR610.pdf

[36] RAND report.

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specified in some detail, or an [occupational analysis] system may not meet the needs for which it was developed. [37] (p. 14, Rand Report)

We agree. Thus, the purpose, program, data, technical, and legal requirements for the use of occupational information in SSA's disability adjudication process[38] were considered by the OIDAP in arriving at its conclusions and recommendations, but could not have been considered by the NAS panel because their members did not have access to that information at the time of their deliberation to consider such design questions as:

1. Descriptor coverage: work- and worker-oriented attributes;
2. Descriptor level of analysis: breadth or narrowness of descriptor definition;[39]
3. Descriptor application: work, workers, both;
4. Descriptor specificity: across all jobs and/or job specific;
5. Descriptor common framework needs; and,
6. Descriptor metrics or scales.

When considering how DOL and SSA need to answer these design questions based upon their distinct purposes and data needs, the OIDAP found the answers were fundamentally different.[40] The polarity in the design and data needs between the O*NET and an OIS for disability adjudication is important to comprehend. Without recognizing the needs of each primary user or user group, broad associations of descriptors – or the data collected with these – are meaningless. For instance, the O*NET Report states that there is:

> … almost perfect equivalence between the O*NET descriptors of near vision, far vision, visual color discrimination, and depth perception and the RFC[41] assessment (descriptors of near acuity, far acuity, color vision, and depth perception). The scales and definition of scale points, however, are still quite different between the two scales. (p. 165, O*NET Report)

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[37] RAND report.

[38] p. 33, Appendix B.

[39] The unit of analysis for each occupational analysis purpose is distinctly different. For the O*NET, this unit of analysis is the occupation level. For SSA, to meet its burden of proof at Step 5 of the sequential evaluation process, the unit of analysis is at the job level. This essential design decision is critical to understand in understanding whether a system is designed econometrically or ergometrically.

[40] p. 66, Appendix B.

[41] p. 56, Appendix B indicates that the O*NET panel did not consider the MRFC in their review of the O*NET's use in disability adjudication.

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For the casual observer who might not understand human function vis-à-vis sensory criteria, near vision may seem almost perfectly equivalent to near acuity and far vision may also seem almost perfectly equivalent to far acuity, when in reality they are functionally different. If these data elements are included in an occupational analysis system, their measurement with respect to work activity may not be adequately captured if the differences are not recognized by those designing the system.[42] The difference is not a matter of nuance; rather, it is a matter of understanding occupational data vis-à-vis its application in the disability context that involves the appropriate measurement of human function.

Understanding human function and disability is important to correctly determine appropriate occupational analysis design for database used in disability adjudication and to make decisions regarding the proper unit of analysis. The O*NET does not use job level data collection that is essential to the disability adjudication process. The general purpose design of the O*NET was appropriate for the needs of its primary constituents, [43] but not as part of a forensic decision-making process requiring greater specificity and certainty in the person-job match that is central to the individualized assessment.

These essential differences in database designs are best illustrated by understanding econometric and ergometric occupational database system designs and which results in the data needed by users. See Appendix D for a model and table indicating the differences between econometric and ergometric designs in occupational analysis systems.

The O*NET's main constituency, workforce development users, identified a need for a higher level of aggregation than exists in the present O*NET.[44] The broad and more abstract data needs of workforce development users led to higher aggregation in O*NET, a result of an econometric design approach. These broader occupational categories are mostly aligned with the SOC and, thus, can be linked with other data collected at that level. However, this level of aggregation is counter to the needs of an OIS for disability adjudication.[45] This design feature of the O*NET is appropriate

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[42] p. 31, Appendix B.
[43] p. 23, Appendix B.
[44] p. 37, Appendix B.
[45] pp. 55 and 108, Appendix B.

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for workforce development, but not for disability adjudication that needs an ergometric design for data generalizability to a single individual – the claimant – not to the American workforce.[46]

Regarding the overall OIS framework, the OIDAP opined in its 2009 report that the creation of an OIS for disability adjudication did not mean starting from scratch, but building upon the best features of the DOT, the O*NET, and other occupational information systems to meet the purpose and needs for which the occupational data is required.[47] Insofar as the O*NET is tied to the Standard Occupational Classification (SOC) and the OIS should crosswalk to that classification as was recommended by the OIDAP, the SOC could serve as a shared bridge to anyone wishing to connect to the O*NET-SOC descriptor framework.[48] In its 2009 recommendation to SSA regarding an initial work taxonomy framework, the OIDAP Taxonomy and Classification Subcommittee utilized the dimensions associated with the O*NET and SOC work activities as part of its framework development. These dimensions constituted approximately 30% of the recommended taxonomy.

FINDING #7: The O*NET Report did not articulate the evaluation criteria that the NAS panel may have used for its evaluation of the O*NET.

Although the O*NET Report identifies how the NAS panel went about its charge,[49] it is unclear what evaluation criteria was used by the panel in its review of the O*NET. This might have been beneficial to the reader as it was with the 1980 NAS report reviewing the DOT.[50]

FINDING #8: The forensic defensibility of using O*NET data for disability adjudication was not addressed by the NAS panel.[51]

For human resources management applications discussed in Chapter 7 of the O*NET Report requiring the need to meet legal criteria, the O*NET was found not to be legally defensible for the same reasons it would not be defensible in disability adjudication. The O*NET was never designed to be forensically applied, nor does it

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[46] pp. 37, 38, 103, and 109, Appendix B.
[47] p. 17, OIDAP report.
[48] p. 90, Appendix B.
[49] pp. 16-17, O*NET Report.
[50] See Miller, et al.
[51] pp. 57 and 88, Appendix B.

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need to be for the purposes for which it was created. Furthermore, the NAS staff concluded that the various sources "… may or may not be the best representation of work that is performed ..."[52] although, as noted earlier, an important consideration for SSA's occupational data needs for legal defensibility is that it reflect national existence and incidence of work.[53]

Chapter 8 in the O*NET Report refers to a 2000 study by one of the O*NET developers, the American Institute of Research (Gustafson & Rose, 2003), that was commissioned by the SSA to review O*NET's suitability for use in disability adjudication. The article concludes that "a version of O*NET [could be] legally defensible and acceptable to decision-makers and claimants alike" (p. 15). It is unclear what premises were considered to arrive at this conclusion or if the need for ergometrically-derived data was evaluated vis-à-vis its application at the n=1 individualized assessment level. For instance, the article posits Static Strength as an example of a suitable descriptor among the 54 O*NET descriptors evaluated when SSA has routinely cited this descriptor as an example of a descriptor that is too holistic and abstract for disability adjudication purposes.

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[52] p. 39, Appendix B.
[53] pp. 11-12, OIDAP report.

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Additional Lessons Learned: Considerations for SSA

Of particular interest to the OIDAP was the timeline for the development of the O*NET. Because of the massive nature of the O*NET content model, the Advisory Panel for the Dictionary of Occupational Titles (APDOT) took three years to arrive at its recommendations to DOL. Eight years elapsed from the time of the APDOT's creation until DOL released its first prototype of the content model and data collection began.[54] By comparison, an OIS for SSA needs a simpler ergometrically-designed occupational analysis system with a content model inclusive of discrete descriptors, that will not require the massive undertaking of O*NET's development or the prolonged timeline. It does call, however, for a system that is designed to produce high quality, forensically-defensible data, which is a scientifically-based and designed product. General Recommendation Four in OIDAP's September 2009 report called for internal and external expertise for the development and maintenance of the OIS. As Ms. Hilton indicated, the vision for the development of the O*NET was also "… to have some permanent professional people within the Department of Labor who could oversee the development of a better and improved database for the future."[55] This type of unit was likewise recommended in 1980 with the NAS review of the DOT.[56] Such a unit has not historically existed within SSA. Because of the forensic nature of the SSA OIS, the OIDAP advises that SSA establish a steady but cautious research timeline. It further counsels against undue acceleration of the R&D agenda until the scientific expertise unit proposed in the September 2009 report has been created and the development of a plan and priority schedule for research is established.

The OIDAP understands SSA has been meeting with or briefing DOL about the OIS since before the OIDAP's inaugural meeting, including meeting with the Employment and Training Administration and more recently also the Bureau of Labor Statistics. Although it is clear that the purpose and needs of each occupational database are due to very different econometric v. ergometric design features, nonetheless, the OIDAP finds value in the O*NET Report's recommendation calling for increased cooperation between SSA and DOL possibly involving areas of sampling and/or data

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[54] p. 45, Appendix B.
[55] p. 18, Appendix B.
[56] pp. 218-219 of the Miller, et al. study on the DOT recommended that "A permanent, professional research unit of high quality should be established to conduct technical studies designed to improve the quality of the DOT as well as basic research …" and goes on to further describe the composition of the unit to include PhD-level scientists (e.g., sociologists, psychologists, statisticians, etc.), BA- or MA-level research assistants, and support staff.

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collection that may be mutually beneficial to each agency. SSA may also wish to explore with DOL how that agency has historically developed, maintained, and applied the occupational data it collects for its own forensic and adjudicative needs (e.g., US Department of Labor, Office of Administrative Law Judges for labor-related immigration cases). SSA may consider the development of ethical standards, data protection, or other systems to safeguard the integrity of the occupational data it collects for its disability programs. SSA may also benefit from collaboration with other Federal agencies, such as the Department of Defense, Office of Personnel Management, Rehabilitation Services Administration, and the Census Bureau, regarding work analysis methods and other information of value to the development of the OIS.

Lastly, the OIDAP raises concerns regarding potential research and assessment ethics[57] and legal considerations in repurposing the O*NET. The same concerns hold true in applying the aging *Dictionary of Occupational Titles* to the disability adjudication process without regard to updated and current research, psychometric, and technology opportunities to meet the specific occupational data needs implied by the individualized assessment process. Until an occupational information system is developed that can meet individualized assessment purposes, and despite the DOT's flaws, today it still remains, "… the most comprehensive set of occupational characteristics currently available."[58] (p. 195, Miller Study)

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[57] See the research and assessment standards in the codes of ethics for the American Counseling Association, American Psychological Association, and the Commission on Rehabilitation Counselor Certification.
[58] See pp. 173 and 195, Miller, et al.

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Acknowledgements

We appreciate the fortunate timing a review of the O*NET presents to the OIDAP when we are at the genesis of providing SSA with our advice and recommendations regarding the OIS's R&D. We are grateful for DOL's willingness to make the database available for professional and public review and critique.

The contents of this report are not meant as a criticism of the use of the O*NET for the primary purpose for which it was created and should not be interpreted as such. Based on our study and review of SSA's occupational information needs, the purpose of this report was to review lessons learned through the O*NET's database study by the NAS that might be helpful to our advice and recommendations to SSA. Emerging needs in the OIS's R&D process may warrant further review of the O*NET Report to inform OIDAP future discussion and deliberations on technical matters.

We especially appreciate the NAS panel's acknowledgement of the unique needs of SSA for occupational data that are not met with the econometric design of the O*NET. Despite having completed their recommendations and disbanding as a panel before they had the opportunity to review SSA working papers or OIDAP's recommendations, the NAS panel elevated the issue of occupational data specific to disability adjudication to a national level that has served to ultimately clarify the need for the development of an ergometrically-based OIS for SSA's disability adjudication process. We thank the NAS study staff for their graciousness and willingness to present to the OIDAP, and particularly for their inclusion of footnotes in the final report to settle potential misunderstandings conveyed by the timing of their process and the publication of their uncorrected proofs and final reports.

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Conclusions

Understanding the differences in occupational systems designs is inherently a technical subject. Casual observers who do not have intimate knowledge and understanding of work analysis as applied to the residual functional capacity of an individual may not grasp the nuances in system design and data quality, or how this may affect generalizability to the claimant in SSA's individualized assessment. We suspect that this chasm in knowledge will continue to occasionally bring those who do not understand why the O*NET and OIS designs are very different, almost complementarily so based on the needs of their primary users, to ask "Why not a "tweaked" O*NET for disability adjudication?"

As noted in our September report, "Undoubtedly, there are some aspects of the DOT and the O*NET occupational information systems that are helpful to the development of the OIS tailored to SSA's disability adjudication needs." (p. 19, OIDAP Report). Our recommendations in that report included some features of both systems that met SSA's legal, program, technical, and data needs and already considered 100% of the O*NET and SOC work activities in its recommended work taxonomy framework, or constituting about 30% of that recommended starting taxonomic framework. The recommendations went further by introducing features for the new OIS to allow it to function within the context of its forensic intent and application. What we learned from the O*NET Report serves to uphold our 2009 general recommendations and to provide additional insights to further assist with our mission as identified in our charter.

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APPENDIX

Appendix A: NAS Presentation Slides to the OIDAP

Appendix B: Transcript from the Occupational Information Development Advisory Panel Quarterly Meeting, March 25, 2010—Presentation of Margaret Hilton, Study Director and Senior Program Officer Center for Education, The National Academies and Mr. Thomas J. Plewes, Associate Study Director and Senior Program Officer, Committee on National Statistics, The National Academies

Appendix C: Timeline of NAS and OIDAP Processes

Appendix D: Econometric v. Ergometric Occupational Analysis Designs

TAB A

A Database for a Changing Economy: Review of the Occupational Information Network (O*NET)

Committee on National Statistics

Center for Education

Study Charge from DOL

- Document and evaluate current and potential uses of O*NET in:
  - workforce development
  - HRM
  - research
- Explore linkage to SOC and other data sets

Study Charge

- Identify improvements, especially in:
  - currency
  - efficiency
  - cost-effectiveness
  - use of new technology

Panel Selection

- Consulted NRC standing committees and others to identify experts
- Balance of expertise, views of O*NET
- NAS President approved provisional slate
- Provisional slate posted for public comment
- Confidential bias and conflict discussion at first meeting
- Final approval of panel members

Panel Members

- Nancy Tippins (Chair), Valtera Corporation
- David Autor, M.I.T.
- John Campbell, University of Minnesota
- Keith Ewald, Ohio Job & Family Services
- Richard Froeschle, Texas Workforce Commission
- Les Janis, Georgia State University
- Virginia Lesser, Oregon State University
- Kerry Levin, Westat
- Kenneth Pearlman, Independent Consultant
- Ann Marie Ryan, Michigan State University
- Juan Sanchez, Florida International University
- William Shobe, University of Virginia

Study Process

- Literature Review
- Workshops in March and April
- Deliberation in closed sessions
- Draft enters NRC review process in August
- Response to Review approved in November
- Transmittal to DOL in November
- Public release of prepublication draft in December: http://books.nap.edu/catalog.php?record_id=12814
- Editing/technical corrections
- Final report in April or May

Prior NRC Studies

Review of DOT (1980)

- Criticized uneven coverage and many other aspects of DOT (pp. 9-11)
- Recommended fundamental changes, including:
  - Continuous updating (p. 13)
  - Creation of permanent, professional cadre (p. 14)
  - Outside technical advisory committee (p. 14)
  - Emphasis on cross occupational linkages (p. 15)
  - Alignment with federal job classification systems (p. 15)
- Led to creation of APDOT and O*NET

Source: NRC, *Work, Jobs, and Occupations: A Critical Review of the Dictionary of Occupational Titles*, 1980

Prior NRC Studies

Preliminary review of the SSA research plan for redesign of the disability determination process (1998)

- Concern that O*NET, as being developed, would not meet SSA's needs (p. 24)

- SSA and DOL should enter into an interagency arrangement to create a version of O*NET with information on minimum, as well as average, job requirements (p. 24)

Source: NRC, *The Social Security Administration's Disability Determination Process: A Framework for Research, Second Interim Report,* 1998

Prior NRC Studies

Review of the SSA research plan for redesign of the disability decision process (2002)

- DOL is no longer updating the DOT (p. 9)
- O*NET will not meet SSA's need to define functional capacity to work without major reconstruction (p. 9)
- Barring some resolution, SSA will be left with no objective basis for justifying decisions (p. 9)

Source: IOM, *The Dynamics of Disability: Measuring and Monitoring Disability for Social Security Programs*, 2002

Prior NRC Studies

Study of changes in work and occupational analysis (1999)

Concluded that O*NET:

Brings together most comprehensive

analytical systems (p. 6)

Is theoretically informed (p. 6)

Is fully accessible (p. 6)

Offers significant improvement over DOT (p. 7)

Maps to other systems (p. 7).

Source: NRC, *The Changing Nature of Work: Implications for Occupational Analysis*, 1999

O*NET Description

- A very large database
- Accessible online or by download
- Uses a "content model" to describe work
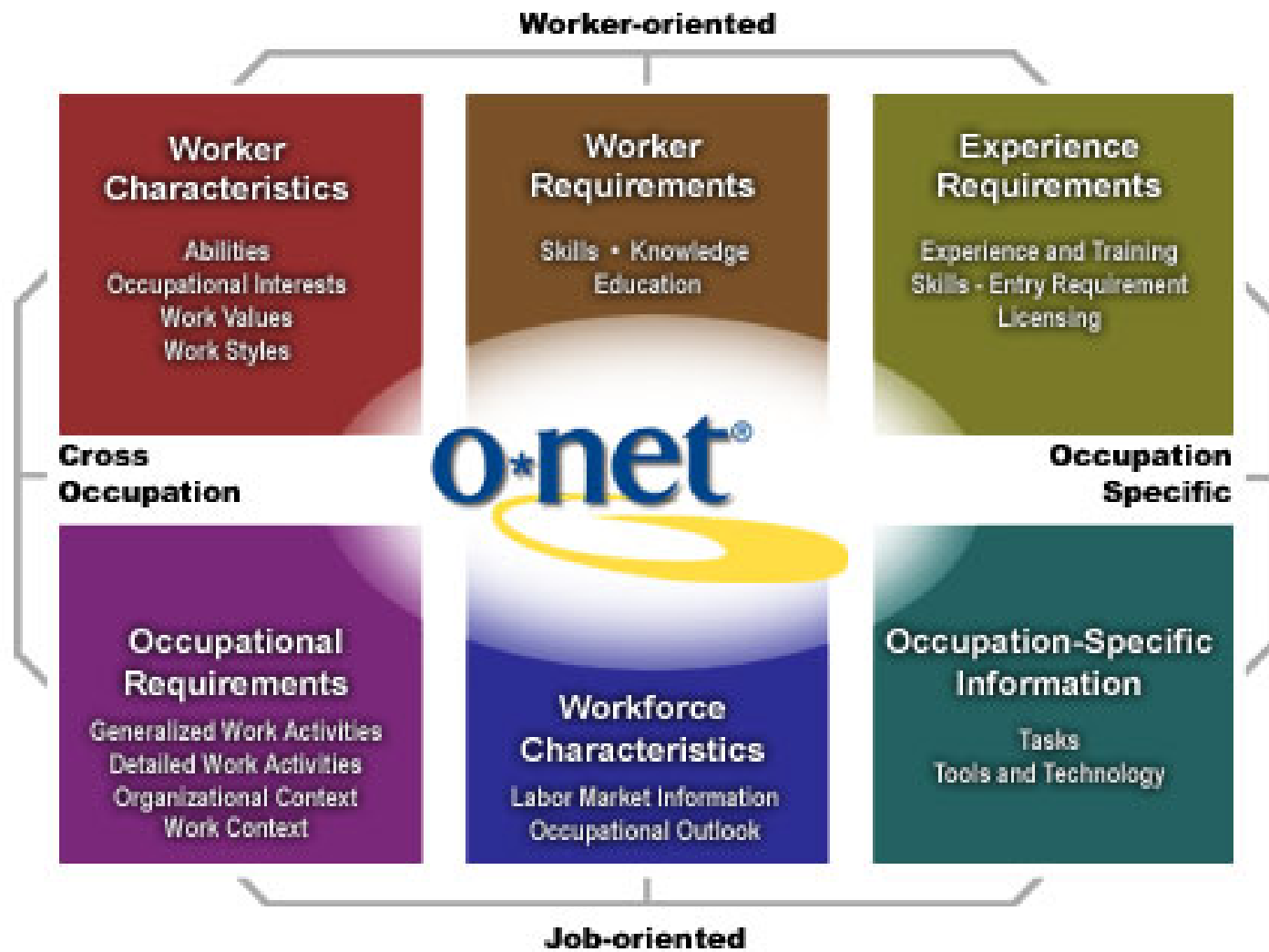
Who Uses O*NET?

1. Online Career Guidance Systems- ~37 million users in 2009
2. State workforce development experts—for job counseling
3. Human resource managers
4. Researchers
5. Vocational rehabilitation counselors

Chapter 8

- SSA uses DOT for disability adjudication

- O*NET is the successor to DOT

- Could O*NET be used by SSA?

- Compare SSA RFC approach with O*NET descriptors

O*NET Descriptors

- Abilities Domain

  -Cognitive abilities

  -Psychomotor abilities

  -Physical abilities

  -Sensory abilities

- Work Context Domain

RFC/O*NET Comparison Physical Abilities

- RFC: Perform specific physical tasks, e.g., lift 20 pounds with the hands and arms

- O*NET Abilities: Less specific measures

O*NET Abilities: Static Strength

32. Static Strength	The ability to exert maximum muscle force to lift, push, pull, or carry objects.

A. How <u>important</u> is STATIC STRENGTH to the performance of *your current job*?

Not Important*	Somewhat Important	Important	Very Important	Extremely Important
①	②	③	④	⑤

* If you marked Not Important, skip LEVEL below and go on to the next activity.

B. What <u>level</u> of STATIC STRENGTH is needed to perform *your current job*?

Push an empty shopping cart

Pull a 40-pound sack of fertilizer across the lawn

Lift 75-pound bags of cement onto a truck

① — ② — ③ — ④ — ⑤ — ⑥ — ⑦

Highest Level
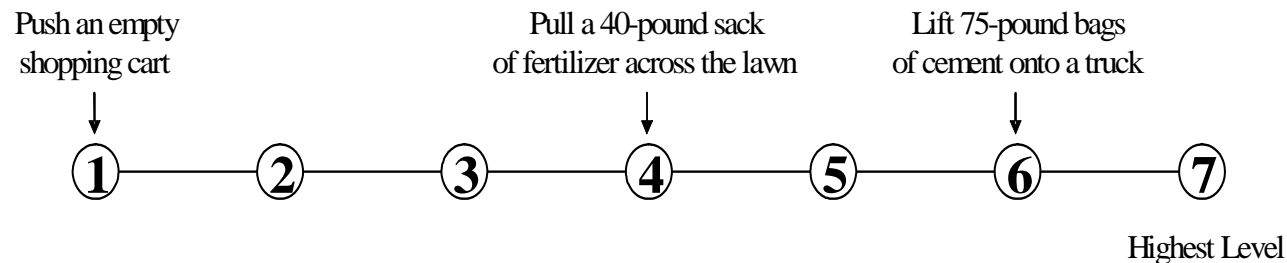
RFC/O*NET Comparison

- RFC: Lifting, standing, sitting, pushing; postural limitations on balancing, crouching, crawling

- O*NET Work Context: Time spent sitting, standing, climbing, walking, etc.

- Anchors differ: RFC specific time ranges vs. O*NET relative time
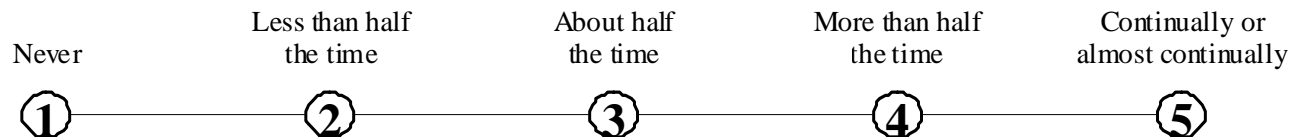
O*NET Work Context Descriptors

34. How much time in _your current job_ do you spend <u>sitting</u>?

Never	Less than half the time	About half the time	More than half the time	Continually or almost continually
①	②	③	④	⑤
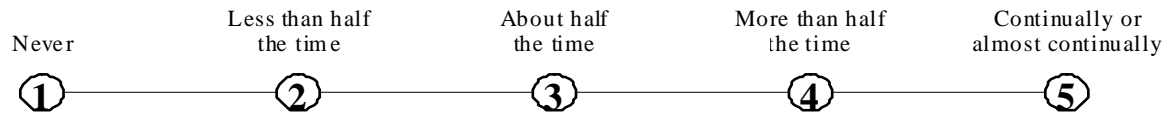
35. How much time in _your current job_ do you spend <u>standing</u>?

Never	Less than half the time	About half the time	More than half the time	Continually or almost continually
①	②	③	④	⑤
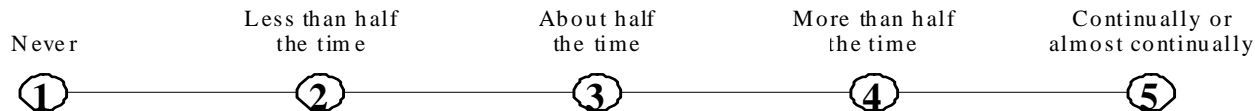
36. How much time in _your current job_ do you spend <u>climbing ladders, scaffolds, poles, etc.</u>?

Never	Less than half the time	About half the time	More than half the time	Continually or almost continually
①	②	③	④	⑤

O*NET Work Context Descriptors

37.   How much time in *your current job* do you spend <u>walking or running</u>?

Never	Less than half the time	About half the time	More than half the time	Continually or almost continually
①	②	③	④	⑤
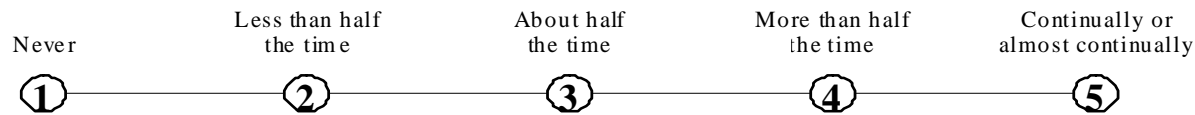
38.   How much time in *your current job* do you spend <u>kneeling, crouching, stooping, or crawling</u>?

Never	Less than half the time	About half the time	More than half the time	Continually or almost continually
①	②	③	④	⑤
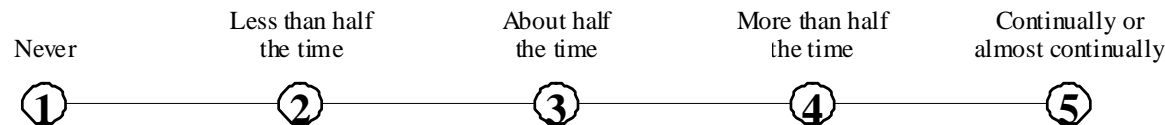
39.   How much time in *your current job* do you spend <u>keeping or regaining your balance</u>?

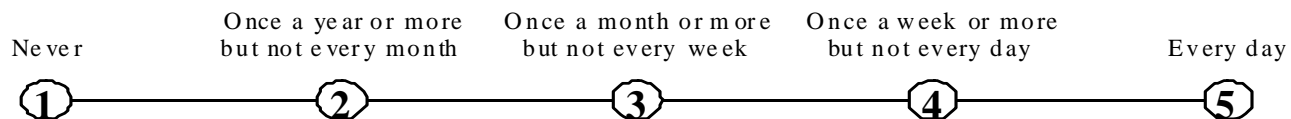| Never	Less than half the time	About half the time	More than half the time	Continually or almost continually
①	②	③	④	⑤
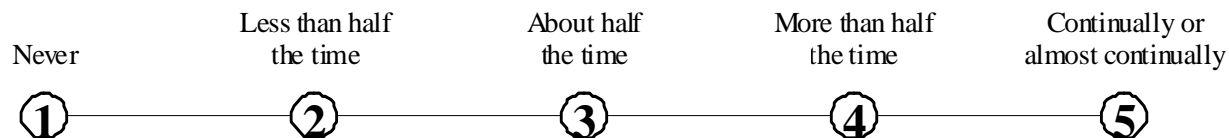
RFC/O*NET Comparison
Environmental Conditions

- RFC: Ability to withstand environmental hazards such as heat, cold, wetness, vibration, etc.

- O*NET Work Context: Exposure to heat, cold, contaminants, vibration

- Anchors differ: RFC "unlimited" to "avoid all exposure" vs. O*NET "never" to "every day."
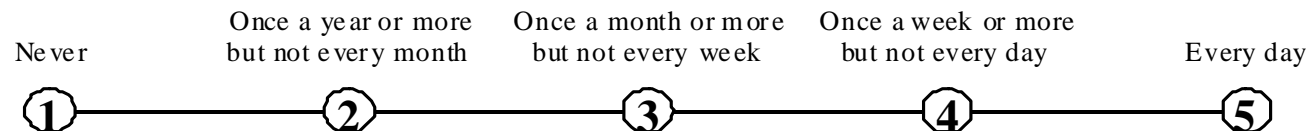
O*NET Work Context Descriptors:

23. In *your current job*, how often are you exposed to <u>very hot</u> (above 90° F) <u>or very cold</u> (under 32° F) temperatures?

Never	Once a year or more but not every month	Once a month or more but not every week	Once a week or more but not every day	Every day
①	②	③	④	⑤
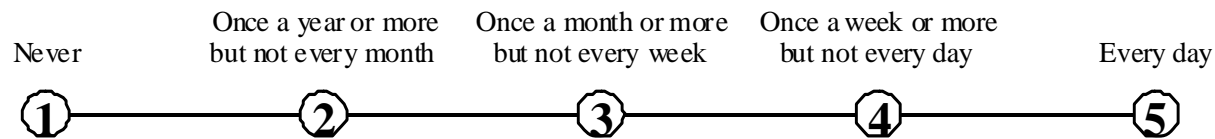
25. In *your current job*, how often are you exposed to <u>contaminants</u> (such as pollutants, gases, dust, or odors)?

Never	Once a year or more but not every month	Once a month or more but not every week	Once a week or more but not every day	Every day
①	②	③	④	⑤

27. In *your current job*, how often are you exposed to <u>whole body vibration</u> (like operating a jackhammer or earth moving equipment)?

Never	Once a year or more but not every month	Once a month or more but not every week	Once a week or more but not every day	Every day
①	②	③	④	⑤

RFC/O*NET Comparison Sensory/Perceptual Abilities

- RFC
- Near acuity
- Far acuity
- Color vision

- Depth perception

- O*NET Abilities
- Near vision
- Far vision
- Visual color discrimination
- Depth perception

Recommendation

- SSA and DOL should create an interagency task force to study the viability of potential modifications of O*NET to accommodate SSA needs

- Analyze SSA occupational information needs

- Analyze interagency cost-benefit and cost-sharing

Aggregation Issues

- O*NET now includes 1,102 occupations, collects data

  on 965

- SOC 2010 includes 840 occupations

- Since 2006, O*NET has added 153 new occupations-- "breakouts" of SOC occupations and green occupations

- Some O*NET users need these disaggregated data and would welcome further disaggregation

- Other users need aggregated occupational categories aligned with the SOC

- The panel did not agree about the appropriate level of aggregation

Aggregation Issues

- **Recommendation:** Assess benefits and costs of changing the occupational classification system

    Including research into whether and to what extent O*NET occupations represent excessively heterogeneous clusters of jobs for the purpose of disability determination

Data Collection Issues

Conclusion: The O*NET Center uses a multimethod sampling approach, collecting data from different types of respondents who may or may not represent the work performed in that occupation. The impact on measurement error is unclear

Data Collection Issues

- **Conclusion**: The construct validity of the taxonomies of descriptors varies across the content model domains

Improving Database Quality

- **Conclusion**: Over the past decade, DOL has achieved its goal of populating O*NET with updated information, but short-term policy agendas have sometimes reduced focus on core database activities.

- **Recommendation**: Focus resources on core database activities, leaving development of most new applications and tools to others.

Improving Database Quality

- **Recommendation**: Establish and support a technical advisory board to:
  - prioritize research suggestions
  - develop RFPs for high priority research
  - review and rank proposals

Enhancing Service to Users

- **Conclusion**: A lack of effective, ongoing communication between the O*NET center and current and potential users hinders full use of O*NET

- **Recommendation**: Establish and staff an ongoing, external user advisory board

O*NET Lessons Learned

- Developing and maintaining a high-quality database requires expertise and funding

     -Development cost ???

     -Data collection costs: $6 m/year to update 100 occupations/year

Questions?

We will be happy to respond to your questions.

TAB B

UNITED STATES OF AMERICA
SOCIAL SECURITY ADMINISTRATION

+ + + + +

OCCUPATIONAL INFORMATION DEVELOPMENT
ADVISORY PANEL

+ + + + +

QUARTERLY MEETING
DAY 2

+ + + + +

Thursday
March 25, 2010

+ + + + +

St. Louis, Missouri

+ + + + +

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

PANEL MEMBERS PRESENT:

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

ALSO PRESENT:

DEBRA TIDWELL-PETERS, Designated Federal
  Official
MARGARET HILTON, The National Academy of
  Sciences
THOMAS J. PLEWES, The National Academy of
  Sciences
DEBBIE HARKIN, Staff
MICHAEL DUNN, Staff
ELIZABETH KENNEDY, Staff
SHIRLEEN ROTH, Staff

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

2   (8:39 a.m.)

3   MS. TIDWELL-PETERS: Good morning,

4   everyone.   If you could please take your

5   seats, we are about to begin.

6   I   am   Debra   Tidwell-Peters,   the

7   Designated   Federal   Officer   for   the

8   Occupational Information Development Advisory

9   Panel, and we welcome you this morning to our

10   second meeting of 2010.

11   I am going to now turn the meeting

12   over   to   the   Panel   Chair,   Dr.   Mary   Barros-

13   Bailey. Mary?

14   CHAIR BARROS-BAILEY: Thank you,

15   Debra.

16   Good morning.   I want to welcome

17   back those who were in attendance with us

18   yesterday at the start of our second quarterly

19   meeting in 2010, and also welcome those who

20   are with us for the first time this morning,

21   whether it be in person or telephonically.

22   This is just a reminder that this

1 meeting is being recorded.

2   For those listening in remotely, to

3 follow our agenda please go to our website,

4 www.ssa.gov/oidap for a copy of the agenda.

5   As I indicated yesterday, for those

6 attending our meeting for the first time who

7 might be interested in the activities and

8 deliberations of past meetings, if you go to

9 the meeting page on our website you can click

10 on any agenda, and associated with that agenda

11 are the PowerPoints that were delivered for --

12 or to the OIDAP since our inaugural meeting in

13 February of 2009.

14   On our website you will find a

15 variety of materials, including technical

16 papers and the first report issued by the

17 panel in September of 2009 called "The Content

18 Model and Classification Recommendations for

19 the Social Security Administration,

20 Occupational Information System." The

21 Occupational Information System is also what

22 we call the OIS.

1   It outlines our advice to SSA

2   regarding the data elements we felt essential

3   to include in the content model specific to

4   disability adjudication.

5   As we indicate at the start of each

6   meeting, the charter of the Occupational

7   Information Development Advisory Panel, OIDAP,

8   is to provide Social Security with independent

9   advice and recommendations as to the

10   development of an OIS to replace the

11   Dictionary of Occupational Titles in the

12   disability determination process.

13   To reiterate something I said

14   yesterday, our task is not to develop the OIS.

15   As our name implies, we are advisory in our

16   capacity.

17   Yesterday during her report to the

18   User Needs and Relations Subcommittee, Nancy

19   Shor encouraged public feedback and comment

20   upon the September report.   I want to

21   emphasize what she said -- that we welcome

22   input from stakeholders and the public at any

1 | point along this process.

2 | To help streamline input into the
3 | September report, we are strongly encouraging
4 | feedback through May 21st of this year.
5 | Besides having the report available at our
6 | website, disseminating it for feedback through
7 | notices along with our meetings in the Federal
8 | Register since November, notifying individuals
9 | subscribed through our electronic mailing list
10 | about it, and the public feedback request, and
11 | speaking about it at four conferences, with
12 | presentations slated at eight more conferences
13 | between now and May 21st, we are attempting to
14 | get the word out about the report, as well as
15 | potentially including it in other means, such
16 | as the Open Government website and/or
17 | independently through the Federal Register.

18 | What stakeholders say matters, and
19 | we want you to know that what you have to say
20 | we want to hear.

21 | Following our review of our
22 | September report, Commissioner Astrue further

1 requested our assistance in providing SSA with

2 recommendations, and we reviewed those

3 yesterday. I will reiterate them this morning

4 for those who weren't in attendance with us

5 yesterday.

6   In January, he asked us to provide

7 SSA with advice in four areas -- in developing

8 a sampling and data collection plan for the

9 research and development process. Number two,

10 for helping with advice and recommendations

11 for the creation of a process for recruiting

12 field job analysts, including methods for

13 certification criteria and training. Three,

14 establishing associations between human

15 functions and the requirements of work that

16 would serve the disability evaluation process.

17 And, four, reviewing relevant documents or

18 reports SSA identifies that may affect or

19 inform SSA's work on the OIS.

20   In our agenda for today, we

21 specifically address the fourth request by

22 Commissioner Astrue.

1   As identified in the September

2   report, the data elements recommended to SSA

3   were the starting point of our process, not

4   the finish line for the OIDAP. While many

5   panels are assembled to study a topic for a

6   designated time, and that culminates with a

7   report, after which time the panel is

8   disbanded, our panel is different in that we

9   have been asked for further independent advice

10 and recommendations into the research and

11 development process of the OIS development.

12   The 2009 National Academies of

13 Science report on the O*NET is the first time

14 that an independent group has reviewed an

15 occupational information system in 30 years,

16 since a review of the Dictionary of

17 Occupational Titles was conducted by the

18 National Research Council in 1980, and what is

19 often referred to as the Miller Study.

20   We commend the U.S. Department of

21 Labor for commissioning the National Academies

22 of Science Panel to independently review the

1 O*NET upon the O*NET's tenth anniversary.

2 This is an important process.

3 It is timely that the National

4 Academies of Science reviewed an existing

5 civilian occupational information system while

6 we are providing advice and recommendations to

7 the Social Security Administration on the

8 development of an OIS. The existence of the

9 National Academies of Science panel in its

10 report provides us with the opportunity to

11 explore areas that exist in the development of

12 any occupational information system, and learn

13 from that process to better advice and

14 recommendations to the Social Security

15 Administration.

16 The National Academy of Science

17 report provides us as a panel with a great

18 chance for learning. That is the goal for

19 this morning.

20 We thank Margaret Hilton, the Study

21 Director and Senior Program Officer, and Tom

22 Plewes, Associate Study Director and Senior

1   Program Officer with the National Academies of

2   Science for accepting our invitation this

3   morning to come and speak to us.

4   Behind Tab 3 in our three-ring

5   binders we will find the biographical sketches

6   for Margaret and Tom, and we will also find

7   copies of their PowerPoint presentations.

8   Margaret and Tom have quite a bit

9   of information to present to us this morning.

10   I will ask the panel to withhold questions

11   until after they are completed with their

12   presentation.

13   Welcome.

14   MS. HILTON: Thank you. That's it.

15   The name of our study, which is available

16   right now on our -- the National Academy Press

17   website -- is called "A Database for a

18   Changing Economy: Review of the O*NET."

19   The Department of Labor asked us to

20   do this study. As Mary mentioned, it seemed

21   like a good time to study O*NET, because it

22   was about a decade old. And they especially

1 wanted us to document how O*NET is used, but

2 they also wanted us to evaluate those uses.

3 And they are especially interested in use in

4 workforce development, because O*NET was

5 originally created for that purpose by state

6 and local employment offices.

7 They were interested in human

8 resource management uses of O*NET, and

9 especially in business and in job matching

10 systems. And they were interested in how

11 O*NET links to other occupational

12 classification systems, in particular the

13 Federal Government's standard occupational

14 classification system.

15 The linkages are important, because

16 it is a database. It is an electronic

17 database, and it is sometimes used going back

18 to the HRM and HRM information systems, HRM/IS

19 systems.

20 They wanted us not only to document

21 how O*NET is used and evaluate it, but also to

22 identify how O*NET could be improved, and they

1 were especially interested in the areas you

2 see listed on the slide. Currency, how up to

3 date is this information? Efficiency, are

4 there better ways to collect the data? Cost

5 effectiveness, is there any way to do it less

6 expensively? And they wondered about using

7 new technologies to collect the data.

8   We just had breakfast with Mary and

9 Sylvia and Mark. We were talking a little bit

10 about the panel selection, and you will see a

11 gold brochure at your place that talks in

12 greater depth about our whole National Academy

13 study process.

14   Basically, Tom did most of the

15 recruiting, and I think he did a great job.

16 Tom talked to the members of the Committee on

17 National Statistics. That's a standing

18 committee of the National Academies. And he

19 also just talked to people in the field.

20   And when we talk to people, they

21 identify other people, so it's a complex kind

22 of a snowball sampling process we go through,

1 and we talked to many people and we have

2 finally come up with a slate of nominees.

3 They are only nominated. Our proposed slate

4 of staff people goes all the way up to the

5 President of the National Academy of Sciences.

6 Only Ralph Cicerone, the President,

7 can approve their membership, and yet even his

8 approve is provisional, because those names,

9 those nominees' names are then posted for

10 public comment for 20 days. And at the first

11 committee meeting we always hold a closed bias

12 and conflict discussion, and based on that

13 discussion some members may decide to

14 voluntarily drop off or there may be other

15 problems.

16 After the bias and conflict

17 discussion, we write a memo that goes to our

18 lawyers, and then, finally, when the lawyers

19 say it is okay, then they become the final

20 committee members. So it's a complex process,

21 but we try to -- we do it that way to try to

22 make sure we get the best panel members.

1   We also are trying to balance areas

2   of expertise, and on our panel we have -- we

3   had quite a few IO psychologists, people in

4   the field of work analysis, but we also wanted

5   users of O*NET. We also tried to get a mix of

6   views of O*NET, so that we weren't having only

7   the people that were involved in the original

8   development or the people that are known to be

9   its biggest proponents, but we also tried to

10   include people who had more questions about

11   the system.

12   So these are the panel members we

13   ended up with. I am not going to read through

14   all their names, but obviously they are people

15   known in the field of IO psychology and users

16   and statisticians.

17   Our study process is that we were

18   reviewing the literature throughout the study

19   process and, of course, our panel members

20   helped us, because some of them know the

21   literature quite extensively. We did hold

22   public workshops in both March and April, and

1   Sylvia Karman spoke at our March workshop.

2   The National Academy has a special

3   exemption from the Federal Advisory Committee

4   Act that allows us to hold some of our

5   deliberations in closed session, and we did

6   hold such deliberations. We created a review

7   draft, based on all of the information we had

8   received that entered our review process in

9   August.

10   Then, we did what's called a

11   response to review, where we talk about every

12   comment we received from the outside

13   reviewers, how we plan to address that

14   comment, and, if we don't plan to address it,

15   we have to have a very good reason not to make

16   the change.

17   Our response to review was accepted

18   in November. One thing I should mention is

19   that all of our panel members and all of the

20   outside reviewers are volunteers, so I was

21   just going to mention the name of our

22   volunteer review coordinator. That was Neal

1 Schmitt from Michigan State University.   He

2 approved our response to the review comments

3 in November, and we transmitted our report to

4 DOL in November, in pre-publication form.

5   And if you are interested in

6 reading the whole report, you can see the web

7 address right there.   It is still published

8 right now in pre-publication form.   Right now

9 there is final editing going on to the second

10 page proofs, and on April 22nd we expect to

11 actually receive the books, the published

12 books, from the National Academy Press.

13   At the time that we get the final

14 copies of the book, the website version will

15 also change and reflect the changes that are

16 in the final printed report.

17   We have done other studies that are

18 related to our recent O*NET study, and Mary

19 mentioned our important study in 1980 when we

20 reviewed the Dictionary of Occupational

21 Titles. And that committee found a lot of

22 flaws in DOT -- uneven coverage.   There were a

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1 lot more job titles listed in the DOT from

2 manufacturing than existed in the economy,

3 because even in 1980 the economy was already

4 beginning its shift, which continues away from

5 manufacturing towards services.

6 That panel recommended a lot of

7 very fundamental changes in the Dictionary of

8 Occupational Titles. One that is actually not

9 listed on my slide was the idea of going to an

10 electronic database, because it is just going

11 to inherently be out of date if you are going

12 to create a big paper dictionary, and then

13 have to update it and print it.

14 So the vision was to have much more

15 continuous updating and to have some permanent

16 professional people within the Department of

17 Labor who could oversee the development of a

18 better and improved database for the future.

19 The panel also recommended an

20 outside Technical Advisory Committee, and the

21 only reason I mentioned that recommendation

22 from a study way back in 1980 is that our

1 panel that met just last year makes the same

2 recommendation to the Labor Department, that

3 they should have an outside Technical Advisory

4 Committee.

5 1980 was a time when a lot of jobs

6 were being lost, manufacturing was shrinking,

7 people were being laid off, and so that

8 committee recommended looking at jobs,

9 defining them broadly and looking at what can

10 be -- what kinds of skills, abilities, and

11 other characteristics can transfer from one

12 job to another?

13 So they talked about cross-

14 occupational linkages. That panel recommended

15 that the new system be more in line with other

16 federal occupational classification systems,

17 and that study was important, because it led

18 the Labor Department to create the Advisory

19 Panel on the Dictionary of Occupational

20 Titles. And that panel led to the creation of

21 O*NET.

22 Another earlier study that relates

1 more directly to your charge was a preliminary

2 review of a research plan to redesign

3 disability determination.   That study

4 expressed a concern that O*NET, as it was

5 being developed at that time, was not going to

6 meet SSA's needs. That panel suggested that

7 SSA and DOL enter into an interagency

8 agreement to create a version of O*NET with

9 information on minimum as well as average job

10 requirements.

11   Another study, which Tom brought a

12 copy of, so I can show it to you, is called

13 "The Dynamics of Disability." And this one

14 came out in 2002. It is related to the study

15 I just mentioned to you, in that it is a more

16 final study of the same SSA research plan.

17   Basically, they observed, which we

18 all know, is that the Labor Department was no

19 longer updating the DOT, that the O*NET would

20 not meet the SSA's needs to define residual

21 functional capacity to work, without major

22 reconstruction. And that if there wasn't any

1   resolution to this problem that SSA would be

2   left with no objective basis for justifying

3   the decisions.

4   Now, another study that is -- we

5   are getting a little more -- a little more

6   recent, still 10 years old, the time flies.

7   This book is called "The Changing Nature of

8   Work: Implications   for   Occupational

9   Analysis." This study was actually done for

10   the Department of Defense, which was looking

11   at a lot of different occupational information

12   classification systems.

13   This panel concluded that O*NET

14   brings   together   the   most   comprehensive

15   analytical systems.   It is theoretically

16   informed. It is fully accessible and offers

17   significant improvements over the DOT, and it

18   maps well with other systems. So this panel

19   was basically encouraging DoD to consider

20   O*NET as a framework as it tries to bring its

21   occupational systems closer together.

22   And now I'm going to turn it over

1   to Tom to tell you more about O*NET.

2   MR. PLEWES: Thank you. And let me

3   just say that more recently there was a Rand

4   panel that took a look at the DOT -- that took

5   a look at the possible use of the O*NET and

6   other classification systems for DoD purposes,

7   and recommended that DoD take a look at O*NET.

8   So that work keeps on going on. I know about

9   that, because I happened to be lucky enough to

10 serve on that panel.

11   Let's see here. Here we go, okay.

12   So what is O*NET? I really don't have to

13 tell this group that, but let me just start

14 out with some very basics here. It is a very

15 large database. It is probably not as big as

16 some people would like, but it is a lot bigger

17 than a lot of users would like to see when

18 they open up those files.

19   It is accessible online or by

20 download, and it uses this thing called a

21 content model to describe work. Pretty basic

22 stuff, but I just want to kind of start out

1 this way, because I think it's important that

2 we understand that.

3 There is a rigor to what O*NET --

4 how O*NET approaches it. The folks who

5 developed O*NET took a look at all of the

6 literature at that time, and came up with, if

7 you will, this quadrant, taking a look at not

8 only work-oriented but job-oriented kind of

9 characteristics of work that wanted -- they

10 wanted to have incorporated.

11 We will get into the evaluation in

12 just a minute here.

13 The important thing I think that we

14 need to understand is that O*NET is a general

15 purpose kind of a classification system. It

16 has a wide variety of users and uses, and we

17 drilled into some of these in the report that

18 we published. Some of the data that we were

19 able to assemble, that really wasn't well-

20 known before, was quite astounding as a matter

21 of fact.

22 For example, over 37 million

1 individual users did some access to an online

2 career guidance system, which is in turn

3 driven by O*NET in 2009. That was a very

4 large number, and it caused some people to

5 think, gee whiz, maybe if we just owned O*NET

6 we would really be rich.

7   But the fact of the matter is is

8 that there are a lot of folks out there who

9 use it for career guidance and have built it

10 into these career guidance systems -- state

11 workforce development, for job counseling and

12 the more traditional roles that O*NET and the

13 DOT and O*NET itself were originally designed

14 for.

15   They had two experts, as you know,

16 from state labor market information

17 organizations that helped provide this

18 information to those folks who are trying to

19 match workers with jobs out in the field,

20 human resource managers, researchers, and

21 then, importantly, vocational rehabilitation

22 counselors, who are of course represented by

1   your Chair and other members of this panel.

2   Those are the folks who use O*NET.

3   In fact, I think that if someone asked me

4   that question, who uses O*NET, I would say

5   you. You may not know it, but in some way

6   this structure called O*NET fits into many of

7   the things that you do on a daily basis, and

8   in a wide variety of areas.

9   The important thing is is that --

10   to understand is that it is designed to meet a

11   wide variety of uses, but in each case there

12   probably is a better system that could be

13   developed for that particular use. But it is

14   a general purpose system, and it does not try

15   to fulfill all of the needs of all of the

16   users, but it tries to, if you will, provide a

17   basis for all users to understand and to view

18   an occupational information system.

19   So what did we say here? First of

20   all, why did we get into this SSA business?

21   People have asked that question. Why did the

22   panel choose to look at this? If you look at

1 the original charge that the panel came up

2 with, it does not specifically say, "Now, you

3 take a look at whether or not O*NET meets the

4 disability -- you know, the requirements of

5 SSA for the disability adjudication work that

6 they do." It just wasn't there.

7 But as the panel began to look at

8 the major uses and the previous studies that

9 were done by the National Research Council and

10 the Institute of Medicine, it became very

11 obvious that a major interface between O*NET

12 and a user system was represented by the need

13 that you are looking at now, the Social

14 Security Administration's need.

15 They didn't feel that they could --

16 that they could put out a report without at

17 least addressing that interface, and so you

18 saw Chapter 8 in our report.

19 We did not have on the panel a

20 person who was an expert in Social Security

21 Administration disability adjudication, and we

22 did not look at all of the issues that your

1 panel is looking at, nor in the depth of

2 hands-on experience that you are taking.

3 So Chapter 8 has to be looked at in

4 a slightly different view than the work that

5 you are doing, it seems to us. And that view

6 is, if you are developing a general purpose

7 occupational information network system, here

8 is a major user, and are there opportunities

9 to serve the needs of this particular user,

10 given what we understand to be the needs of

11 the user and the functionality that O*NET

12 provides. So we need to make that very clear.

13 Now, the panel was not you, and it

14 did not bring the same expertise to bear on

15 the issue. But I was pleased to note from the

16 report that you put out in January that they

17 faced and they approached the issues in many

18 of the same ways that you have approached the

19 issues -- by taking a look, if you will, at

20 the ability of O*NET to fulfill some of those

21 particular functions.

22 So they actually said, okay, could

1 O*NET be used by the Social Security

2 Administration for this? Well, what you need

3 to do, if you are going to make that kind of

4 decision, is that you need to take a look at

5 your residual functional capacity approach,

6 and you need to take a look at the O*NET

7 descriptors, and so let's do that

8 systematically.

9   You've done a lot of that work here

10 in your report, and I will not spend a lot of

11 time at it. But I do want to let you know

12 what the panel came up with.

13   First of all, here are the O*NET

14 descriptors. They are a mix of the cognitive,

15 psychomotor, physical abilities, sensory

16 abilities, a mix of the traditional, if you

17 will, occupational classification, with some

18 of the work in fact taken directly from

19 Fleishman's work on the physical ability side.

20   But it covers a wide range of

21 domains, and it doesn't focus on the

22 domains of absolute most interest to you.

1 Okay? It is, again, a general purpose. And

2 there is, of course, the work context domain,

3 which we won't spend too much time on.

4   So we took a look at comparing, as

5 best the panel could, the residual functional

6 capacity with O*NET comparisons. And the

7 first thing they looked at was physical

8 abilities. We took as a given the residual

9 functional capacity requirements that have

10 come up with -- that the Social Security

11 Administration has come up with.

12   And it was very obvious that when

13 taking a look at physical abilities that O*NET

14 has much less specific -- specificity in the

15 measures.   There is not the kind of

16 specificity that is necessary to meet the

17 current RFCs for physical disabilities. And,

18 interestingly enough, that is exactly what

19 your report found as well.

20   And this is just an example. The

21 same example is in your report. I won't dwell

22 on this. It's in our presentation.

1   In terms of comparing the RFCs for

2   lifting, standing, sitting, pushing, you can

3   read all those. Again, there are specific

4   time ranges versus a relative time used in

5   O*NET. The anchors are very different, and it

6   causes,if   you   will,   a   not   direct

7   transferability of the O*NET work context to

8   meet. It is the RFCs of Social Security, and

9   here are some of the examples in O*NET, and

10   you can see that. We'll just go through this

11   very quickly.

12   In   terms   of   environmental

13   conditions, the RFCs are quite specific in

14   terms of ability to withstand environmental

15   hazards. There is -- the O*NET work context

16   has exposure to heat, contaminants, vibration,

17   and so forth.

18   I would call this -- you may not

19   agree with me -- I would call some of these

20   differences between O*NET and the RFCs used by

21   Social Security to be marginal. They aren't

22   critical to say O*NET will never ever meet

1   that, but it is a matter of your judgment.

2   And I think you should -- you need to take a

3   look at that, and here are the O*NET anchors

4   there.

5   In terms of sensory perception and

6   abilities, we have just gone through again

7   near acuity, near vision, far acuity, far

8   vision. Is that nuance, or is that terribly

9   important? If you are sitting in the field

10   and you've got to make a judgment, perhaps it

11   is terribly important, and you need to have

12   something much more specific or different than

13   O*NET is offering you.

14   And so what did we come up with?

15   What did the panel come up with? I think that

16   there was -- there is a general concurrence on

17   the panel with the findings of the previous

18   National Research Council reports that O*NET,

19   in and of itself, cannot be used in the way it

20   is for the purpose that you need to use it.

21   It just -- it is not -- it is not fully

22   capable of serving that purpose.

1   However, there are those good

2   things we talked about in terms of O*NET --

3   its tie-in with other classification systems,

4   particularly with the standard occupational

5   classification structure, the rigor that is

6   used in building O*NET.

7   Some of that rigor is based on

8   surveys of workers in establishments that may

9   have some issues with response rates, and so

10   forth, and we looked at that also. And, yes,

11   we recommended some revisions in the way that

12   those surveys are done.

13   Some of that has to do with the way

14   in which experts, job analysts, provide their

15   input to this. And, again, there has to be a

16   reconsideration of some of -- the way in which

17   that particular business is done, and we --

18   the panel made recommendations in that as

19   well.

20   But I think that they saw enough

21   goodness in O*NET that they recommended that

22   the Social Security Administration and the DOL

1 create an interagency task force to study the

2 viability of modifications of O*NET to

3 accommodate the needs of the Social Security

4 Administration.

5 It didn't say, "Social Security

6 Administration, change the way you do business

7 to meet O*NET." There are some things that

8 could be changed within O*NET, for example,

9 that would help make that system much more

10 reflective of -- or much more consistent with

11 where the Social Security Administration wants

12 to go with disability adjudication.

13 It asks that there be an assessment

14 of SSA occupational information needs.

15 Whoops, we didn't recommend your panel, but

16 that's certainly a contribution that we

17 believe that you are making. And then,

18 analyze interagency cost-benefit and cost-

19 sharing.

20 These things don't come without

21 cost, both to DOL in terms of the kind of work

22 that must be done to make O*NET somewhat more

1 friendly to this particular use, nor certainly

2 to the Social Security Administration as it

3 would try to work with Department of Labor to

4 make O*NET much more friendly to the

5 disability adjudication and the disability

6 adjudication system -- information system much

7 more friendly to O*NET.

8   So there is a cost-benefit that has

9 to be made. We did not make that cost-

10 benefit. The panel did not -- didn't have the

11 time, the input, but we recognized -- the

12 panel recognized that you don't make these

13 decisions based on what is nice to have. You

14 make the decisions based on what is practical,

15 what is affordable, and what is consistent

16 with the ultimate need of the user. And I

17 think that was the recommendation.

18   So a lot of the work that was

19 suggested by the panel has been handed back to

20 the Department of Labor, and not just to

21 Social Security Administration. So, and we

22 are still waiting to hear what Department of

1 Labor's response to that particular

2 recommendation is.

3 MS. HILTON: Thanks, Tom. That was

4 a very good explanation of where the panel is

5 and what we recommended.

6 When Debra Tidwell-Peters invited

7 us to speak, she mentioned some specific

8 issues that she would like us to address,

9 because our report is very broad, so I just

10 wanted to try to address some of the specific

11 questions she asked about.

12 One is the aggregation issue, which

13 I know you all are very familiar with. I

14 mean, obviously, DOT had 14,000 jobs. Right

15 now, O*NET has 1,100 occupations, so that's --

16 it's a huge difference.

17 The O*NET is aligned with SOC. It

18 does have a coding system with digits, so that

19 you can relate any O*NET job to an SOC job.

20 Nevertheless, it is not perfectly aligned.

21 The SOC has just revised. It has 840.

22 Obviously, O*NET has over 1,000.

1   Since 2006, O*NET has added 153 new

2   occupations.   These   are   what   they   call

3   breakouts of SOC occupations. In other words,

4   it is becoming more disaggregated.   Part of

5   the breakouts are related to the search for

6   green occupations.

7   What our panel observed is that for

8   some of the users of O*NET they really want

9   this disaggregated data.   People in career

10   guidance want to be able to direct young

11   people towards a more specific job, not

12   towards such a broad occupation.

13   Obviously, your users would like

14   more disaggregated data. On the other hand,

15   there are other users, and specifically in

16   workforce development. And that is the core

17   constituency that is why, first, DOT was

18   created, and then O*NET was created.

19   It was to serve state workforce

20   development people who are trying to place

21   people in jobs. And they like the broader

22   occupations,   because   they   are   completely

1 | aligned with SOC occupational codes and they

2 | can then link this occupation with a lot of

3 | data collected by the Bureau of Labor

4 | Statistics and state and local agencies, and

5 | that is all collected at the SOC level.

6 | So the panel observed these -- some

7 | people want more disaggregation, some people

8 | want less disaggregation, and the panel didn't

9 | agree. I think that shows that our panel was

10 | well balanced. I mean, you could say it's a

11 | problem that they can't agree, but it just may

12 | reflect the reality.

13 | The panel -- although the panel

14 | didn't agree what the level of aggregation

15 | should be, again, just as in the case that Tom

16 | just mentioned, our panel met for a certain

17 | amount of time and then it quit -- that was

18 | the end of our time, money, and effort, and so

19 | the panel felt very, very strongly that this

20 | aggregation issue was critical for the future

21 | of O*NET and for the usefulness of O*NET.

22 | And so they recommended that the

1 Labor Department either conduct or commission

2 research to look at the costs and benefits of

3 changing it, of either making it bigger or

4 making it smaller, and, you know, what would

5 be the result of making it bigger, what are

6 the pros and cons, what are the results of

7 staying smaller, closer to SOC, what are the

8 pros and cons.

9   One element of our recommendation

10 on this aggregation issue, and it's a long

11 recommendation -- we had many long

12 recommendations.   So one element was

13 specifically calling for some research into

14 whether O*NET is too disaggregated for the

15 purposes of disability determination, and to

16 what extent.

17   There is the recommendation. Sorry

18 I didn't put it up there, but it seems -- I

19 know you have this all right in front of you

20 anyway, so -- okay.

21   Data collection -- now that was

22 another issue, and Tom just started to mention

1   it briefly. Right now, O*NET is using --

2   collecting data using a lot of different

3   methods and a lot of different sources. It is

4   collecting data from many different types of

5   respondents, including job incumbents.

6   Then, there are people they call

7   occupational experts, people who may have

8   worked in the occupation at one time, but now

9   they might be trainers or doing something else

10   related. That is another group. And then,

11   the third group are the occupational analysts.

12   Our conclusion was that these --

13   all these different sources may or may not be

14   the best representative of the work that is

15   performed, and that the impact on measurement

16   error is unclear, because with every method

17   you introduce new error.

18   Specifically on the issue of the

19   use of occupational analysts, here again this

20   was an issue where our panel did not entirely

21   agree, and all you have to do is read Chapter

22   2. You can tell it. But you can especially

40

1 tell it because there is a dissent at the end

2 of our report, where two of our panel members

3 dissented on about a few issues, but they were

4 -- one of the issues was this use of

5 occupational analysts where they felt that

6 giving paper descriptions of an occupation to

7 a trained occupational analyst would not

8 result in an accurate rating.

9 Another data collection issue that

10 we identified was that the construct validity

11 of the taxonomies of descriptors varies across

12 the different domains of the content model.

13 Tom showed you a picture of the content model.

14 It is very, very big. There are many

15 domains. Within the domains, there are many

16 specific descriptors. And some of those

17 descriptors have a strong research base.

18 Tom mentioned the abilities

19 descriptors. They are drawn from Fleishman.

20 They are widely accepted as some of the best

21 descriptors of abilities, with the strongest

22 research base. Some of the other taxonomies,

1   skills, and knowledges there is less support

2   in the research.

3   So to the database quality, another

4   conclusion was that DOL has achieved its goal

5   of populating the O*NET with updated

6   information over about a decade. We did see a

7   problem that there were some short-term policy

8   agendas that were sometimes reducing the focus

9   on the core database activities.

10   And to mention some specific

11   concerns there, the Labor Department and the

12   O*NET center, trying to make it more user-

13   friendly, put a lot of things onto O*NET

14   Online, which some of the users in the field

15   don't entirely agree with, especially trying

16   to define an in-demand occupation, define it

17   nationally, and yet we had state people

18   speaking at some of our workshops saying they

19   did not like it that O*NET Online puts little

20   flags and highlights certain occupations to

21   suggest that, you know, these are growth

22   areas, this is where you can place people in

1   jobs, and so forth, and especially now with

2   the recession.

3   So basically that is an example of

4   a short-term policy agenda, and certainly the

5   current focus on the green jobs, where they

6   are adding a lot of green jobs, but how

7   representative are those jobs of the whole

8   economy.

9   So our recommendation here was that

10   DOL should be focusing its resources on the

11   core database activities, and not getting so

12   involved in developing the applications and

13   tools and trying to become more user-friendly.

14   Related to that, as Tom mentioned,

15   many people just take the whole O*NET database

16   and they make it more user-friendly anyway,

17   especially these online career guidance

18   systems. So Labor Department doesn't need to

19   spend its own time and money creating these

20   applications.

21   Our most important recommendation

22   for improving the quality of the O*NET

1 database was that we strongly believe that the

2 Labor Department should establish and support

3 a Technical Advisory Board. That advisory

4 board we think should be prioritizing research

5 suggestions that come from the field or from

6 within DOL. They should develop RFPs for the

7 high priority research items, and then they

8 should review and rank proposals from outside

9 researchers to conduct that research.

10 As I mentioned, we have many

11 recommendations in our report. We have a lot

12 of long recommendations. But since many of

13 our recommendations relate to research, this

14 is our top priority.

15 If you are interested in how we see

16 the priority of all of our many

17 recommendations, I would recommend that you

18 read Chapter 10. In Chapter 10 of our report

19 we rank all of the research and development

20 recommendations.

21 We also noticed there were problems

22 in terms of the users and the communication

1 back and forth between the database developers

2 and the users. We didn't think there was

3 enough ongoing communication. The

4 example I just gave to you of the O*NET center

5 identify nationally in-demand occupations when

6 people at the state level don't even think

7 those are in demand is an example of a lack of

8 communication. So here we recommended that

9 they establish and staff an ongoing External

10 User Advisory Board.

11 When we met not long ago with the

12 SSA Subcommittee of House Ways and Means, they

13 wondered, are there any lessons learned from

14 the development of O*NET that could be

15 applicable as you start to create your own

16 occupational information system? Our main

17 conclusion would be that developing and

18 maintaining a high quality occupational

19 database takes a lot of expertise, and it

20 requires money.

21 We were not able to develop an

22 estimate of how much it costs to create the

1 content model, but that was a very, very

2 extensive research project that went on for

3 five years -- developing it, developing the

4 constructs, the taxonomies -- and then going

5 to the field and pilot testing it.

6   We do know that the data collection

7 costs right now are about $6 million a year,

8 and that updates 100 occupations a year. So

9 that gives you some idea.

10   And one other thing I'll mention

11 related to data collection costs is that

12 whenever O*NET adds more occupations, whenever

13 it becomes less aggregated, more

14 disaggregated, as it has done, that is always

15 going to increase your data collection costs,

16 because you have more occupations to go after,

17 and that means that same money that could have

18 been used to refresh your existing occupations

19 more frequently is going to chase more

20 occupations. So there is always a tradeoff in

21 any kind of database like this.

22   And that's it. Now we're ready to

1 take your questions.

2 CHAIR BARROS-BAILEY: Thank you,

3 Margaret and Tom, for your words and your

4 presentation. I think this is very useful to

5 us this morning.

6 Before I open up questions to the

7 panel, I have some questions I would like to

8 ask. And I know that we have mentioned that

9 Mark and I met with you independently outside

10 of the OIDAP, and Mark outside of his

11 university, me outside of my previous IOTF

12 representation, and we also understand that

13 SSA has met with you as well.

14 So in terms of the version of your

15 report that is online, on the website, in

16 terms of the pre-publication copy, and you

17 mentioned in your slides that you are going to

18 have the final report available in April or

19 May, what are the changes that are in the

20 final copy of the report?

21 MS. HILTON: I can't -- I mean, I

22 just can't give you that answer. We made

1 | changes throughout -- well, we made some
2 | changes to almost every chapter, as a result
3 | of the feedback we got both from DOL, from the
4 | O*NET center, and from you.
5 | But, you know, without having a
6 | copy in front of me, because every change --
7 | as I mentioned to you at breakfast, there was
8 | a lot of internal discussion, because our
9 | policy is that we don't change major
10 | conclusions or recommendations. So that I can
11 | say, that the major conclusions and
12 | recommendations, including the recommendation
13 | that Tom shared with you about an interagency
14 | task force, have not changed.
15 | CHAIR BARROS-BAILEY: How about for
16 | Chapter 8? What were the specific input that
17 | you received that might have changed anything
18 | in Chapter 8?
19 | MS. HILTON: We did make some small
20 | changes to Chapter 8 in response to our
21 | meeting with you and with SSA.
22 | CHAIR BARROS-BAILEY: What were

1 those?

2   MS. HILTON: Like I said, I can't

3 -- without having the, you know, copy in front

4 of me where I see the redline strikeout, I

5 can't say.

6   CHAIR BARROS-BAILEY: So were they

7 editorial in nature?

8   MS. HILTON: I would say they are

9 more editorial in nature.

10   CHAIR BARROS-BAILEY: Okay.

11   MS. HILTON: As I mentioned, our

12 policy is not to change major conclusions or

13 recommendations.

14   CHAIR BARROS-BAILEY: Okay. Thank

15 you. And then, in terms of how I came at the

16 report, and as a panel member, what guided my

17 evaluation of the report was our own

18 evaluation of the occupational information

19 needs of SSA. And I know that Tom has a copy

20 of the report, and I know that's outlined in

21 pages 11 and 12 of the report.

22   And so for anybody who is listening

1 in and wants to access a copy, I mentioned at

2 the beginning of the meeting that you can go

3 to our website, the home page, and access the

4 report.

5   The occupational information needs

6 that are outlined in pages 11 and 12 of our

7 report include four categories of what an

8 occupational information system must contain

9 to meet SSA's needs. I would like to ask some

10 questions specific to the recommendation that

11 the National Academies of Science panel has in

12 terms of occupational information needs for

13 SSA in Chapter 8 for disability determination

14 as they relate to these four areas.

15   One of the things -- the very first

16 thing that is -- the bullet says reflect

17 national existence of incidence of work. It

18 says a new occupational resource must show

19 that work exists and that work exists in

20 numbers sufficient to indicate that it is not

21 obscure.

22   One of the things -- the last

1   things that you just mentioned was the

2   inclusion of green jobs and whether, you know,

3   that overemphasis is really reflective of work

4   as it exists in the national economy.

5   So how did the NAS panel consider

6   this occupational information need for SSA in

7   terms of the disability determination process

8   in its recommendations for Chapter 8?

9   MS. HILTON: We didn't specifically

10   address, you know, the specific need of the

11   work identified in numbers, or specific -- we

12   did not identify that question specifically

13   within the context of the need for disability

14   determination, and we didn't even make a

15   specific conclusion or recommendation.

16   But I think it's fair to say that

17   our panel believes that the current

18   occupations that are in O*NET are pretty well

19   representative of the occupations in the

20   national economy. I think it's fair to say

21   also that some -- well, I don't -- we didn't

22   really reach consensus, as I mentioned, about

1   the recent growth and the new occupations that

2   are added, with some panel members feeling

3   like these are being added for political

4   reasons, if they are green jobs, and other

5   panel members saying that it is very important

6   that any occupational system remain up to

7   date. And if jobs are changing, and if new

8   jobs are being created, they should be

9   reflected.

10   So I'm sorry that is not an exact

11   answer to your question.

12   MR. PLEWES: Without directly

13   addressing this point that you make here in

14   terms of reflecting national existence and

15   incidence of work, I think the panel did talk

16   to that, and consider that, in terms of

17   reaffirming the need for the linkage to the

18   standard occupational classification

19   structure.

20   The standard occupational

21   classification structure is that structure

22   which allows you to link to those databases

1 which tell you about the trends in the

2 occupations out in the field, the new and

3 emerging occupations, and so forth. The

4 standard occupational classification structure

5 is updated on a recurring cycle, a regular

6 cycle, so there is a built-in updating

7 mechanism there.

8   So those two aspects of O*NET I

9 think are -- commend themselves to being able

10 to reflect the national existence and

11 incidence of work. Whether they do or not in

12 practical aspect as they are applied, as the

13 O*NET information flows into -- I'm sorry, as

14 SOC information -- based information flows

15 into O*NET, is not something that the panel

16 looked at.

17   CHAIR BARROS-BAILEY: Thank you.

18 And in your presentations I noted that you use

19 the word "occupation" in terms of reflecting

20 the O*NET, and I know that in terms of a

21 decision point that DOL had to make in the

22 development of the O*NET was what was the unit

1 of analysis. And in your report you indicate

2 that to be the unit of analysis at the

3 occupation level.

4   Was there ever a consideration of

5 the unit of analysis or a user need where the

6 unit analysis was at the job level?

7   MS. HILTON: Well, as I mentioned,

8 when the Advisory Panel on the DOT met, one of

9 their concerns was that it was just not

10 practical, not affordable, to continue trying

11 to collect data on 14,000 job titles. I think

12 it is important to remember that even the DOT,

13 even with 14,000, that those job titles were

14 representing more different, unique jobs.

15   If you are going to create a

16 national database, it is not ever going to be

17 possible to define every job, because

18 organizations have their own job titles and it

19 just gets very, very large.

20   I remember Rich Froshel telling me

21 something about when the state of Texas talked

22 to their employers and said, "What job titles

1   do you use here in Texas?" And they got

2   something like 80,000 different job titles

3   back.

4   So I believe that it -- that the

5   reason -- one reason O*NET uses the broad

6   occupations it does is that it was trying to

7   follow the recommendations of that earlier

8   advisory panel, which recommended looking at

9   fewer, broader occupations, partly because, as

10   I mentioned, their concern of identifying the

11   transferable skills and knowledges, and so

12   forth, that people might be able to use to

13   move from job to job.

14   CHAIR BARROS-BAILEY: Thank you.

15   The second area in terms of SSA's needs for

16   occupation information was reflecting work

17   requirements, that it must enable SSA to

18   evaluate an individual's ability to perform

19   work rather than to obtain work. As such, it

20   says any new resource must reflect

21   occupational information that is aggregated,

22   defined, and measured, in a way that allows

1 SSA to compare work requirements to an

2 individual's RFC and to determine the ability

3 to work despite a severe impairment.

4 So the question is: how did the

5 National Academies of Science panel consider

6 this occupational information need for SSA's

7 disability determination process in its

8 recommendations?

9 MR. PLEWES: Again, I think that if

10 you look at Chapter 8, the panel did not go

11 into the level of detail that you are -- have

12 and will go into. Let's say that right up

13 front.

14 So its comparisons that I discussed

15 with you between the RFC and the O*NET are at

16 a fairly high level of aggregation. That

17 said, when you go into the various

18 descriptors, you can see that in some cases

19 O*NET does a pretty good job, and in some

20 cases it falls way short of the mark as to

21 meeting this particular requirement in terms

22 of reflecting work requirements, as you have

1   defined them as necessary to conduct -- to, if

2   you will to clearly understand the RFCs. So

3   it varies.

4   CHAIR BARROS-BAILEY: Thank you.

5   And you mentioned in the chapter the RFC,

6   which is the physical. I didn't see a mention

7   of the MRFC, which is the mental/cognitive.

8   Was that something that the National Academies

9   of   Science   panel   considered   in   its

10 recommendations for Chapter 8?

11   MR. PLEWES: Not in any depth, no.

12   MS. HILTON: No.

13   MR. PLEWES: There was a mention,

14 and that's it. No.

15   CHAIR BARROS-BAILEY: Okay. And I

16 know you have read our report.   That's a

17 really big area of research that needs to be

18 done.   It's one of the fastest-growing areas

19 in terms of claims, and a really big issue in

20 terms of disability determination.

21   One of the questions -- and I know

22 when I met with you I talked about and you

57

1   mentioned in your presentation that I'm a

2   rehab counselor, and I talked of my role as a

3   vocational rehab counselor and also a forensic

4   expert.

5   And I noted in your PowerPoint

6   presentation that you talked about voc rehab,

7   but I didn't see that you had anybody present

8   to you who came from the forensic community,

9   somebody with a legal background, somebody who

10   does expert witness testimony.   And I just

11   wanted -- did you have any testimony, any

12   information   in   terms   of   the   forensic

13   application?

14   MS. HILTON: No, we didn't.

15   CHAIR BARROS-BAILEY: Okay.   And so

16   that goes to my question in terms of the third

17   bullet, that the database, the occupational

18   information system must meet a burden of proof

19   that   the   individual   is   actually   not

20   theoretically capable of doing some kind of

21   work.

22   And   so   has   there   --   did   the

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1 | National Academies of Science -- or how did

2 | the National Academies of Science panel

3 | consider this very important threshold in

4 | terms of occupational information for the

5 | disability determination process?

6 | MS. HILTON: Right. Well, again,

7 | we didn't consider that. I think one reason

8 | that what -- our recommendation here would be

9 | to create an interagency panel to look at this

10 | in greater detail, is that we recognize that

11 | we did not -- I mean, it is not only with

12 | disability determination, but many other

13 | areas, we began the process of looking into

14 | the database in greater depth.

15 | We identified areas that we thought

16 | were problematic with our quick look, and we

17 | think further study is needed.

18 | CHAIR BARROS-BAILEY: Okay. So

19 | insofar as further study has occurred since

20 | these recommendations, I know that you noted

21 | that one of the recommendations was basically

22 | for something such as our panel, then that

1 would be additive to the recommendations that

2 the National Academies of Science panel has in

3 Chapter 8, is that what you mean by that?

4 MS. HILTON: Well, I think as Tom

5 mentioned it would -- you know, one of the

6 things we recommended that this interagency

7 group do would be to look at SSA's needs, and

8 obviously, you know, you have done that.

9 CHAIR BARROS-BAILEY: Okay.

10 MS. HILTON: So --

11 CHAIR BARROS-BAILEY: So in the

12 fourth bullet -- and I just want to bring this

13 one up, I'm not going to go through each of

14 these individually, because it's my

15 understanding that you didn't look at the

16 specific needs, is that correct, in terms of

17 any of the occupational information needs as

18 outlined in our report, that that was not

19 considered by the National Academies of

20 Science panel?

21 MS. HILTON: Well, this report came

22 out -- our report came out before your report,

1 so, you know, we couldn't address --

2   CHAIR BARROS-BAILEY: Our report

3 came out in September.

4   MS. HILTON: Oh, that's true, but

5 our committee had done its work.   Our report

6 was in review at that point, so we were not

7 going to be making changes except in response

8 to review.   So there was -- you know, it

9 wouldn't have been possible for us to look at

10 all of these things.

11   I mean, I would say in terms of

12 these three bullet points here, the reflect

13 work requirements, as Tom just mentioned, that

14 the analysis in Chapter 8, we did try to look

15 at what we thought -- what some RFC needs

16 were, specifically physical, and compare those

17 with some O*NET descriptors.

18   CHAIR BARROS-BAILEY: Okay.   And I

19 know that Chapter 8 does mention our report,

20 and it also mentions our recommendations,

21 outlined --

22   MS. HILTON: Yes.

1   CHAIR BARROS-BAILEY: -- in the

2   report, so there was some cursory review of

3   our report, but not a consideration of our

4   report within the recommendations?

5   MS. HILTON: Right. Right. It was

6   -- you know, in editing some -- some of the

7   final editing of the report after it had been

8   through review, just to update it, was to

9   mention that your report had come out and try

10   to briefly capture some of the things that

11   were said.   But the panel, no, did not

12   deliberate on your report's findings.   the

13   panel finished its deliberations in late

14   April, with a final teleconference.

15   CHAIR BARROS-BAILEY: So if the

16   recommendations had been made before our

17   report was out, might that have impacted some

18   of the recommendations?

19   MS. HILTON: Certainly.   I would

20   think we would have taken that into account.

21   CHAIR BARROS-BAILEY: Okay. Okay.

22   I'm going to open it up to the panel to see

1   if there are other questions for members of

2   the panel. Sylvia?

3   MEMBER KARMAN: Hello. Thank you

4   very much, Tom and Margaret, for coming out

5   today. I do have one question -- well,

6   actually, I've got a couple, but one that just

7   occurred to me. You mentioned that it, you

8   know, wouldn't be practical to gather data at

9   a more disaggregated level, and the level that

10   we've been really looking at.

11   I notice on page 7-10 of your

12   report that the second bullet under O*NET

13   content refers to occupational information is

14   not customized for jobs in a particular

15   organization. This inability to describe a

16   specific job in detail can limit O*NET's

17   utility for legal defensibility, and this is

18   for personnel selection. We face the same

19   issue --

20   MS. HILTON: Right.

21   MEMBER KARMAN: -- with regard to

22   any occupational information system that we

1   would need in order to meet our burden at step

2   5.

3   MS. HILTON: Yes.

4   MEMBER KARMAN: And so, therefore,

5   that is why that is so, you know, incredibly

6   important to us.

7   MS. HILTON: Yes.

8   MEMBER KARMAN: Among the questions

9   that I have is also page 2-2 of your report

10   provides five different questions that you all

11   felt   were   important   in   assessing   an

12   occupational information system.

13   And they each -- one starts out

14   with, how general or specific will the

15   descriptors of occupational requirements be?

16   Second one is, given a particular level of

17   generality/ specificity, should the set of

18   descriptors of a particular occupational

19   requirement be a representative sample of all

20   possible descriptors of that requirement? Or

21   should it represent the entire universe of

22   descriptors?

1   Third   one   is,   should   each

2   descriptor   of   occupational   requirements   be

3   applicable   to   every   occupation   or   unit   of

4   analysis?   Fourth   is,   is   the   taxonomy   to

5   include   genuine   taxons,   such   as   those   that

6   exist   in   biology?   This   gets   at   the   issue   of

7   skills   that   you   mention   there.   Certainly,

8   skills   cannot   necessarily   meet   the   definition

9   of   a   taxon.

10   Five,   can   the   taxonomy   be   designed

11   to   serve   a   wide   range   of   purposes   among

12   diverse   users?   I'm   wondering   how   the   panel

13   answered   those   questions   for   O*NET,   or   did   you

14   feel   that   the   Department   of   Labor   answered

15   those   questions   for   O*NET?   And   then,   also,

16   how   did   you   all   assess   those   questions   in

17   terms   of   our   --   the   needs   that   were   outlined

18   in   Chapter   8?

19   MS.   HILTON: I   think   that   these

20   questions   are   raised   as   a   way   to   introduce

21   this   whole   chapter,   which   is   about   the   history

22   of   the   development   of   O*NET.   You   know,

1   basically, near the end it said that the

2   developers of O*NET have addressed all of

3   these questions.

4   So basically they are kind of

5   rhetorical questions, if you know what I mean,

6   saying how general or specific should this be?

7   And then, if you read the rest of the

8   chapter, you know, you will see that they

9   ended up with something they called OUs,

10   occupational units, and I think there were

11   about a thousand of them.

12   So I don't think these questions

13   are introduced, you know, with the idea that

14   then our panel is going to answer these

15   questions. As I say, it's a vehicle to get

16   you to read on and find out, you know, what --

17   how the developers address these questions.

18   And as for our panel's view on the

19   -- for the first question, how general or

20   specific, as I mentioned, our panel did not

21   agree on how general or specific it should be

22   and recommended that it was important to study

1 the pros and cons of being more and less

2 specific.

3 MEMBER KARMAN: Okay. I just want

4 to mention that when we -- our panel went

5 through the assessment of what basically SSA

6 gave the panel, its occupational information

7 needs, and a lot of what we did as a panel was

8 really address these kinds of issues.

9 And so what we're noticing is that

10 almost at every stage or at every question we

11 would have selected a direction that is

12 decidedly differently --

13 MS. HILTON: Different from what

14 O*NET took, yes.

15 MEMBER KARMAN: -- from what the

16 Department of Labor did, because their mission

17 is decidedly different.

18 MS. HILTON: Right, right.

19 MEMBER KARMAN: Thank you.

20 CHAIR BARROS-BAILEY: Dave?

21 MEMBER SCHRETLEN: Good morning,

22 and thank you very much. I have a question

1 | that concerns sort of the first recommendation

2 | in Chapter 8, and that is the recommendation

3 | that SSA and the Department of Labor create an

4 | interagency task force to study the viability

5 | of potential modifications of O*NET to

6 | accommodate SSA needs.

7 | And my question concerns a point

8 | that you make in Chapter 8 about the

9 | behavioral anchors for the rating scales. I

10 | think it's on pages 8 -- 6 and 7 of Chapter 8.

11 | And you give an example of behavioral anchors

12 | for arm -- I think arm stability, and the

13 | example includes lighting a candle at a point

14 | of two on the ability scale. This is hand

15 | steadiness. And threading a needle at point

16 | four.

17 | And you make the point -- you

18 | acknowledge in this report that there are

19 | problems with these behaviors.

20 | MS. HILTON: With those bars, yes.

21 | MEMBER SCHRETLEN: And there are a

22 | couple of them, and you cite a couple that are

1 very clear, and I think that you did an

2 excellent job of articulating some of the

3 problems.

4   I do think that there are others as

5 well that are not articulated there, but I

6 think that the bars' anchors are intuitively

7 appealing, but had a lot of scaling problems.

8 And you mentioned the lack of specificity.

9 In fact, that's sort of a theme that runs

10 through, you know, Tom, your presentation as

11 well, that the 52 abilities may lack some

12 sufficient specificity for SSA's needs.

13   But with regard to this behavioral

14 anchors, and the problems, those behavioral

15 anchors and the 52 abilities that they have

16 been used to assess, have been applied to the

17 1,102 occupational units in O*NET. And my

18 question is this: if those behavioral anchors

19 lack enough specificity for SSA's use, and

20 have other scaling problems, how could it be

21 modified, how could the existing database be

22 modified for SSA's use?

1   It seems to me that the only

2   modification would be to essentially start

3   from scratch, because you can't simply go back

4   and reapply new behavioral anchors to the

5   existing database. The existing database was

6   developed using these behavioral anchors, and

7   so the -- my question is: can you envision a

8   way of modifying O*NET that does not include

9   replacing O*NET?

10   MS. HILTON: I think that it

11   deserves further study.   That is what we

12   recommended, that it needs to be studied. But

13   one thing I would mention is, you know, in

14   terms of the analysis in Chapter 8, that the

15   whole focus -- it does not focus only on the

16   abilities domain.   You know, it also talks

17   about the work context domain, and some of the

18   other domains.

19   I mean, that is the thing about

20   O*NET.   As Tom mentioned, it is a general

21   purpose.   It is very big.   It has 239

22   descriptors.   It is like please all, please

1   none, you know. It was designed for many

2   purposes, and it doesn't serve any one user

3   exactly the way that user would like it to be.

4   MEMBER SCHRETLEN: In fact, one of

5   the things you said is that the panel could

6   not agree on the appropriate level of

7   aggregation.

8   MS. HILTON: Yes.

9   MEMBER SCHRETLEN: And that some

10   people might think of that as a problem of the

11   panel, but it strikes me that it's really not

12   a problem of the panel at all, but the fact

13   that O*NET -- that Department of Labor has

14   attempted to make a sort of all-purpose

15   occupational information system.

16   And there are -- different purposes

17   have different requirements, of course.   So

18   for some reason, as you pointed out very

19   appropriately, some users might want a more

20   aggregated, more disaggregated system.

21   But my question about this bars issue is

22   really not one that I think further study

1   could address, because it's illogical. My

2   question is: is there a logical way -- is

3   there a way that it could be modified without

4   replacing it? And I don't think that that's a

5   question that really -- that further study

6   will answer. I think it's a question that --

7   is it that a logical analysis of the existing

8   system leads to an answer?

9   MR. PLEWES: I agree with you. I

10   don't believe that you can fundamentally

11   change the anchors and retain the system as it

12   is.   But the panel didn't look at that.

13   That's just my sitting here thinking about it.

14   Now, how about tweaking?

15   MEMBER SCHRETLEN: That's what I'm

16   asking.

17   MR. PLEWES: I think it would be

18   possible, with proper research, to tweak. If

19   indeed the result of the tweaking brought it

20   closer to the Social Security Administration's

21   RFCs   than   the   current   system,   without

22   fundamentally changing the result.

1   MEMBER SCHRETLEN: Okay. So that

2   is -- so that is wonderful. Then, how -- can

3   you imagine even one way that it could be

4   tweaked?   That's what I'm trying to get at.

5   I'm trying to understand how this could be

6   done without fundamentally recreating the

7   database, because, you know, either the bars

8   --

9   MR. PLEWES: I don't give you an

10   answer. In a research approach, I would think

11   -- I would compare results of current with the

12   tweaked, and then to see what the differences

13   are. But I don't know.

14   MEMBER SCHRETLEN: So you are

15   suggesting like starting with new behavioral

16   anchors.

17   MR. PLEWES: Yes.

18   MEMBER SCHRETLEN: On some of the

19   existing occupational units.

20   MR. PLEWES: On those of most

21   interest, where the deviation between the

22   descriptors, the anchors -- current anchors

1   for the descriptors and the RFCs are -- have

2   the greatest differences that are very, very

3   important   to   the   Social   Security

4   Administration processes.   But that's me.   I

5   -- the panel didn't look at that, I have to

6   tell you.

7   MEMBER SCHRETLEN: Right. I guess

8   the question is, if you were to find a

9   correspondence between revised behavioral

10   anchors and existing behavioral anchors, that

11   still wouldn't answer the question of what to

12   do about levels of ability that fall between

13   those points on the scale.

14   MR. PLEWES: No.

15   MS. HILTON: I mean, we definitely

16   thought there needed to be research on the

17   behavioral anchors, but all of our research

18   recommendations don't necessarily mean that we

19   think that O*NET has to be rebuilt from the

20   bottom up.

21   There are always costs and benefits

22   to making any change to a big system like

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1 this, and this is why we thought they needed

2 an outside ongoing expert technical advisory

3 committee, one of the reasons being to

4 prioritize what research is most important,

5 and, secondly, what are the potential costs

6 and benefits.

7 You know, some people are very,

8 very critical of the behavioral anchors in

9 O*NET. Our dissent, if you read the dissent

10 to our report, the two dissenters say, "Just

11 get rid of -- get rid of the behavioral

12 anchors on the level scale," because they are

13 so problematic. The rest of the committee did

14 not agree with that.

15 Nevertheless, even the dissenters

16 do not say we should scrap O*NET, that we need

17 to start over. So as Tom mentioned, there are

18 a lot of tweaks. You can make modifications.

19 And then, there are costs and benefits to

20 doing that.

21 CHAIR BARROS-BAILEY: When you say

22 "tweaks," what do you mean?

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1   MS. HILTON: For example, the two

2   people that dissent to say that we should get

3   rid of the level scales in the abilities and

4   skills domains, and only use the importance

5   scale, and that they also suggest maybe we

6   should be looking at other scales, such as

7   frequency or duration.

8   I think that relates a little bit

9   to the Chapter 8, the comparison of how much

10   time   do   you   spend   sitting,   kneeling,

11   crouching, and it is like half the time, all

12   the time, whereas for RFC purposes you need

13   actually number of hours.   So things like

14   that.

15   CHAIR   BARROS-BAILEY: And   you

16   mentioned the work context, you are referring

17   to 38 in your slide that talks about how much

18   time   in   your   current   job   do   you   spend

19   kneeling, crouching, stooping, and crawling.

20   MS. HILTON: Right.

21   CHAIR   BARROS-BAILEY: And   for

22   disability   determination,   we   might   have

1 | somebody who has a shoulder injury who can do
2 | kneeling, crouching, and stooping, but they
3 | can't do crawling, because that involves the
4 | upper extremity. So are you talking about not
5 | just changing the anchors but also changing
6 | the descriptors?

7 | MS. HILTON: Definitely. I mean,
8 | we called for research into the descriptors.
9 | We said that the content -- what was the exact
10 | language? The content validity of the domains
11 | and the descriptors is uneven. We think that
12 | in some domains, like abilities, the
13 | descriptors are stronger, they have a stronger
14 | research base. In some of the other domains,
15 | like knowledges and skills, there is not such
16 | a strong research base.

17 | So here again, I mean, I think some
18 | people would say that our report is radical,
19 | because how could you go back and look at the
20 | content model. The content model is perfect,
21 | it's -- you know, it was studied. It was
22 | studied a long time ago. We think it is time

1   for a fresh look at this.

2   CHAIR BARROS-BAILEY: Sylvia, and

3   then Shanan.

4   MEMBER KARMAN: Okay. I guess it

5   seems like the panel must have had some

6   things, though, in mind, you know, just sort

7   of piggybacking on what David has asked, and

8   Mary has brought up, because, you know, on

9   page 8-3 the panel -- the National Academies

10   of Science report, its panel stated that the

11   panel is not advocating the adoption of O*NET

12   by SSA, or the development of a hybrid O*NET

13   disability system in the disability

14   determination process.

15   However, we conclude that a

16   considerably modified or expanded O*NET would

17   be capable of informing the disability

18   determination process.

19   So for one -- one question I have

20   is that this seems contradictory, but, you

21   know, then the other question I have is, given

22   the discussion that we've just had for the

1 last few moments, it seems as if you all may

2 have had something in mind, what would that

3 modification look like that would not, as

4 David pointed out, or as Mary brought up,

5 really require extensive change to the point

6 where it would be impractical and not a cost

7 savings in terms of, you know, not requiring

8 two different systems.

9 MS. HILTON: And I have to say I

10 really can't answer this question, because, I

11 mean, this is really what the panel thought,

12 what we have here in the report. The panel is

13 not meeting anymore. As Tom mentioned, you

14 know, we didn't look in-depth at this whole

15 disability question. We took a quick look,

16 and we thought it needed further study. And

17 since it was important to both agencies,

18 that's why we suggested that the two agencies

19 study it together.

20 CHAIR BARROS-BAILEY: Shanan?

21 MEMBER GIBSON: My question will

22 likely be a simple followup to that, then, or

1 | actually I have a couple of questions. The

2 | first was, I noted that the chapters did not

3 | identify the primary authors for each chapter.

4 | Is it possible to find out who the primary

5 | chapter author was for Chapter 8, so that, for

6 | example, in this case we could ask them, what

7 | were their thoughts perhaps related to those

8 | comments, so that we understand better, so we

9 | have the information going forth.

10 | MS. HILTON: No, I don't think so.

11 | You know, it is a committee consensus report.

12 | If one panel member did take a lead on a

13 | chapter, that chapter did not go forward for

14 | inclusion unless the rest of the committee

15 | agreed to it. So we really try to talk about

16 | these as committee reports, not -- they are

17 | not like edited chapters by individual

18 | authors. It's a consensus.

19 | MEMBER GIBSON: It just seems that

20 | there is very great distinctions among how the

21 | different chapters are written, so, for

22 | example, Chapter 7 does a very good job of

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1 identifying specific issues related to

2 psychometrics, which might impact the use of

3 the O*NET. And then, we see nothing similar

4 to it in other chapters, like ours, so I'm

5 thinking one person probably wrote this

6 chapter, and so their styles are very

7 distinctly different, which is what leads me

8 to that conclusion.

9   My other -- my second question --

10 so I guess I have three now -- is in the very

11 beginning of your discussion you talked about

12 how you received a review of the report and

13 created a response to the reviews. Are those

14 part of open documentation, so that we could

15 look at them as well?

16   MS. HILTON: No, they're not.

17   MEMBER GIBSON: Okay. And then, my

18 final question is simply to try to make

19 certain I understand kind of your overall

20 theme here. Is it a -- am I understanding

21 correctly when I say that it appears the

22 overarching decision of the panel was that the

1 O*NET is a general purpose instrument, which

2 means it will meet the needs of some but not

3 the needs of others, it will meet the needs of

4 individuals and groups to differing degrees,

5 and, therefore, other systems might be

6 necessary or appropriate to meet the needs of

7 different organizations.

8 MS. HILTON: I don't know that we

9 commented on whether other systems were

10 necessary, but certainly what you said about

11 how it's an all-purpose and it meets some

12 needs but not other needs, that's correct.

13 MEMBER GIBSON: So the logical

14 conclusion of it doesn't meet the need,

15 something else must --

16 MS. HILTON: It could be. I mean,

17 we have to -- we are representing what's here

18 in our report, so we can't --

19 MEMBER GIBSON: And that's --

20 MS. HILTON: -- go beyond what our

21 panel said.

22 MEMBER GIBSON: Okay. Thank you.

1   CHAIR BARROS-BAILEY: Tom?

2   MEMBER HARDY: Good morning. It is

3   a real pleasure having you here, and I -- I

4   would imagine all of us would like to spend

5   two hours talking with you, because we all

6   have volumes of questions. And so I'm not

7   going to take a lot of time, I just have two

8   because in my role here -- I'm a vocational

9   counselor, but I'm also an attorney.

10   So   I've   got   two   different

11   interests, and they are each -- and my

12   question is that -- I actually rather more

13   have a discussion than a question, if you want

14   to know the truth. One is more for you, Ms.

15   Hilton. Because of my vocational background,

16   I am very interested in skills, and in

17   transferability of skills.

18   And we are working right now on

19   coming up with a definition, and I noted in

20   the report you spoke several times about the

21   fact that O*NET doesn't truly define "skills,"

22   and that it is kind of difficult in some ways

1 to track skills using their raters for skills.

2   In doing that -- in reading that, I

3 also read went out and read a little further,

4 and I found your report on future skill

5 demands.

6   MS. HILTON: Okay.

7   MEMBER HARDY: Which I read, and I

8 thought it was fascinating. I really loved

9 reading this.

10   MS. HILTON: I'm glad you liked it.

11   MEMBER HARDY: You did a great job.

12   MS. HILTON: Thanks.

13   MEMBER HARDY: And it really made

14 me think about a lot of things. But what

15 really stuck with me -- and I go back to what

16 you said about we are very concerned about SSA

17 and what those needs are, but there is broader

18 context, and I get -- and that report really

19 broadened my context of how skills can be

20 used, and for workforce development, workforce

21 planning, education, and huge numbers of

22 things.

1   But what struck me was all the way

2 through here everybody kept commenting on how

3 O*NET was not going to be useful, for the most

4 part, in answering the workforce development

5 questions. Is that a good reading on this, or

6 am I kind of skewing it because of something

7 else?

8   MS. HILTON: Well, actually, I am

9 not sure that -- you are talking about the

10 workshop report on future skill demand.

11   MEMBER HARDY: Future skills, yes.

12   MS. HILTON: The people were

13 critical of O*NET in terms of its ability to

14 identify changes over time in the national

15 different skill demands of work.

16   MEMBER HARDY: Yes.

17   MS. HILTON: I think that someone

18 at the workshop did make that point. I do

19 think there are some questions, you know, if

20 you are looking at it strictly from a research

21 point of view, whether the data in O*NET could

22 be used, if you could track it for 20 years,

1   which it hasn't even existed for 20 years --

2   MEMBER HARDY: Yes.

3   MS.   HILTON: --   and   compare

4   versions of the database every five years, and

5   look   at   what   levels   of   the   skills   were

6   reported in 1995, 2000, 2005. I mean, I do

7   think   it's   theoretically   possible   that   you

8   could use O*NET for that purpose.

9   But   with   regard   to   that   question

10   that you are talking about, I think that the

11   discussion in Chapter 7 of our current report

12   does a pretty good job of talking about how

13   very useful O*NET is for this kind of labor

14   market   research   as   things   change   and   as

15   economists try to understand what is growing

16   -- not only what is growing and shrinking,

17   but, you know, within jobs, within a given job

18   title, what the demands are.

19   MEMBER HARDY: And I get that, and

20   I guess what -- this is more of a discussion,

21   truly.   I am wondering if we go ahead with

22   what we're doing, and get skills defined down

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1 to a job level, and are able to really anchor

2 that and not use some of these O*NET

3 descriptors, which Dr. Spenner from Duke was

4 talking about the O*NET descriptors of skills

5 as being --

6 MS. HILTON: Ken Spenner from Duke,

7 yes.

8 MEMBER HARDY: Yes, being we'll

9 just say unwieldy. If we were able to get to

10 a better definition of "skill," take it to a

11 job level, and then actually track that,

12 wouldn't that be more useful than using O*NET

13 for those purposes, that this -- the other

14 paper was talking about?

15 MS. HILTON: I don't know. Like I

16 say, I mean, it is -- your question is very,

17 very theoretical. I mean, we are talking

18 about creating a whole new database, and the

19 first -- what you're talking about is the

20 first step. Then, is that database going to

21 be representative, you know, broadly

22 representative of the jobs in the national

1   economy? That's the second question.

2   The third question, you know, if it

3   had a better -- if it had better descriptors

4   of skill, yes, I think that could be useful.

5   MEMBER HARDY: Okay.   My other

6   question is more of a legal question, because,

7   again, I'm an attorney, and I have to worry

8   about these things. And this is more for you,

9   Mr. Plewes. You were talking about doing some

10   tweaking or nuancing, and trying to find ways

11   where the marginal differences could be

12   brought down.

13   In constructing your report, did

14   you guys talk to any attorneys about legal

15   defensibility issue?

16   MR. PLEWES: We recognized that

17   there were those, but we -- no, we did not

18   talk to -- if I had known that we were going

19   to be here today, we probably would have gone

20   --

21   (Laughter.)

22   -- to an attorney as one of our

1 presenters, I can tell you that, and a

2 vocational rehabilitation person, thank you

3 very much. But no, we did not.

4   MEMBER HARDY: Okay. My concern is

5 that, you know, everybody on the panel looks

6 at me and goes, "Oh, you're the lawyer. Make

7 sure we've got it right." And one of the

8 things I always say back is, "If and when we

9 develop -- or when we develop this system,

10 every piece of it must be legally defensible,

11 because if one piece fails the test, the

12 entire system fails the test."

13   And in a broad sense, I kind of

14 come back to you and say if we're looking at

15 O*NET and I see in your report you speak

16 multiple times about areas that are flawed,

17 how can we -- how can we work around that if

18 there is a legal defensibility issue, in your

19 opinion?

20   MS. HILTON: Well, I'm not sure if

21 it's exactly the same thing, but I know that

22 some of the panel members that work in the

1 field of selection and development of

2 selection tests, which are very often subject

3 to legal challenges, mentioned that they find

4 O*NET information very, very useful, but they

5 use it as a starting point.

6 Like if they are trying to create a

7 selection test, they start with an O*NET

8 occupational description, and that gives them

9 the basic foundation of information. But

10 then, they add a lot more specific

11 information, specific to that organization,

12 that more narrowly defined job title, and so

13 forth.

14 MEMBER HARDY: Okay. I guess just

15 so you understand, when we go to court,

16 whether it's in Social Security or -- many of

17 those cases then end up in federal court,

18 which is subject to federal rules of evidence

19 as well.

20 If you build something on any

21 platform, that platform still must be

22 defensible under the same rules of evidence.

1 And that is an issue that I have.

2 MR. PLEWES: And I think the

3 question for your panel is to -- is to think

4 about O*NET in that case as a framework. And

5 I think it's fairly clear that O*NET is a

6 framework. It would probably be preferable to

7 the DOT as a framework in terms of some of the

8 things that it offers in terms of its tying to

9 the SOC and its updating, and so forth.

10 But that, as Margaret suggests from

11 other areas, that there probably needs to be

12 within that framework a lot of adjustment to

13 meet the requirements that you have.

14 MEMBER HARDY: So you would still

15 advocate O*NET over DOT as a basis.

16 MR. PLEWES: I think that was done

17 some time ago.

18 MEMBER HARDY: Okay.

19 MR. PLEWES: That decision was made

20 in terms of a framework for looking at the

21 issues.

22 CHAIR BARROS-BAILEY: I have --

1   MEMBER HARDY: I could talk to you

2   for hours.

3   CHAIR BARROS-BAILEY: Okay. I have

4   a quick question about that. In the days of

5   PDF, it's very easy to search a report in

6   terms of key word, so I did search the report

7   in terms of "legal" and saw that there were

8   only two references to it. One that Margaret

9   just mentioned, page 7-3, in terms of a

10   starting point, and the other one that Sylvia

11   had mentioned.

12   And in both of those instances it

13   -- it indicates that the O*NET is not

14   defensible, and so those were the only

15   mentions that I was able to find in the report

16   in terms of the defensibility. And so I think

17   Tom's question is, if when you look at pages

18   11 and 12 of our report in terms of the must

19   needs of an occupational information system,

20   and the third one being legal defensibility,

21   it becomes a really big issue, if, you know,

22   there are aspects of the O*NET that are not

1   legally defensible.

2   Mark, you had a question?

3   MEMBER WILSON: Yes.   Welcome.

4   It's good to see you again. It's a real honor

5   to be here today speaking with you about very

6   important issues. And, as you see, I have to,

7   as the IO psychologist along with Shanan, deal

8   with very diverse sets of issues in terms of

9   making   recommendations   about   occupational

10   information for this purpose.

11   And as you know, we exchanged some

12   correspondence, and so I -- and I know you

13   might not -- because Mary and others were

14   asking you some specifics about changes, but I

15   just wanted to check to see in a couple cases

16   if some of the things that we discussed might

17   have gotten changed.

18   The first one was early on in the

19   report it -- and we discussed this as a

20   potential typo -- refers to O*NET as a system

21   providing information about jobs when, in

22   fact, it is really an information system about

1   occupations. Do you remember if that got

2   changed to occupations instead of jobs?

3   MS. HILTON: I know we went through

4   the report before and after review, because we

5   got comments about that also in review. And I

6   think that in many places we changed the word

7   "job" to "occupation." But I don't believe we

8   changed it in every single place, and that was

9   partly for purposes of readability by someone

10   who doesn't know anything about occupations,

11   occupational analysis, or anything.

12   The term "occupation" had not yet

13   been introduced, so that you might still see

14   in some of the early pages of the report

15   references to "job."

16   MEMBER WILSON: Yes. And I think,

17   you know, the reason we discussed that was

18   because it is sort of -- O*NET clearly doesn't

19   provide, you know -- and it gets some of these

20   others, but, you know, I certainly understand

21   that.

22   The second question I had that we

1 discussed -- and this was kind of more of a

2 wish, I don't know -- and you talked about and

3 had a slide about the advisory panel, and in

4 your report you refer to it as external, and

5 we discussed the idea that we need to define

6 the term "external." This is not contractors.

7 Were you able to make any changes

8 there in your report to specify what you meant

9 by "external," so that when the agency got

10 this they would understand what that meant in

11 terms of your intent, or --

12 MS. HILTON: I am not sure what we

13 did there.

14 MEMBER WILSON: Sure. I completely

15 understand. The other two things in terms of

16 wishes -- and these I suspect you weren't able

17 to do a whole lot about, but I thought I would

18 ask. As other people have indicated, you

19 know, we don't get someone -- the National

20 Academies of Science prestige in work analysis

21 very often to look at these issues and make

22 these kinds of reports.

95

1   And so I was -- was as sort of my

2 wish list saying that I wish you would have

3 addressed evaluation issues and work analysis

4 in terms of specifying what some of the

5 criteria were that the external panel might

6 look at. Did you make any changes there to

7 say, you know, we want you to look at X, Y,

8 and Z? Or, you know, these are the --

9   MS. HILTON: Well --

10   MEMBER WILSON: -- fundamental

11 evaluation criteria that should be considered?

12   MS.   HILTON: Right.   As   I

13 mentioned, our policy is not to make changes

14 to any major conclusions or recommendations.

15 So, I mean, that would involve making a change

16 to a recommendation with more detail, so --

17   MEMBER WILSON: Sure.   No, I

18 understand. And the other thing we discussed

19 -- and some places you talked a little bit

20 about panel formation, things of that sort.

21 But it wasn't always clear what the

22 methodology was in terms of how the panel went

1 about -- you know, Tom mentioned that there

2 were experts that were aware of the literature

3 and did lit reviews and things of that sort.

4 But was there anything added more?

5 And I think this gets some to Shanan's

6 question. We really want to understand what

7 the mind of the panel was with regard to

8 several of these specific issues, because we

9 are struggling with them. If there is some

10 methodological issue that we need to address,

11 we want to know that.

12 Were there any expansion of, you

13 know, here's how we went about coming to this

14 particular conclusion in any cases? Do you --

15 MS. HILTON: Well, we did try to

16 base our conclusions on all of the input we

17 received in our two workshops.

18 MEMBER WILSON: Right.

19 MS. HILTON: And also, the panel

20 members' own expertise and knowledge. We

21 talked in closed sessions about what exactly

22 we thought our major conclusions would be. We

1 basically went through several rounds of

2 deliberation about our conclusions and

3 recommendations, where we were talking about

4 them in person, we talked about them in

5 teleconference, and then we would send them

6 out to the whole committee --

7   MEMBER WILSON: Yes.

8   MS. HILTON: -- trying to reach

9 consensus. And, you know, we did not reach

10 consensus on some issues, as you know.

11   MEMBER WILSON: Right. Absolutely.

12 And especially with regard to the disability

13 issue, you know, you mentioned that it was a

14 much more general panel, and this wasn't --

15   MS. HILTON: Right.

16   MEMBER WILSON: -- necessarily an

17 area where you acquired experts. Were any

18 disability experts, as part of the methodology

19 you describe, which is sort of trying to gain

20 consensus -- did you -- did they bring anybody

21 with expertise in for any of those

22 deliberations other than the panel meetings

1   and --

2   MS. HILTON: No.

3   MEMBER WILSON: The next issue,

4   which you had in your slides and I wanted to

5   ask your thoughts on, is that the effective

6   measurement error is unclear.   And as you

7   know, in the second panel meeting, Dr. Harvey

8   made a presentation where, among other things,

9   he   looked   at   calculation   of   reliability

10   coefficients in O*NET data.

11   MS. HILTON: Yes.

12   MEMBER WILSON: And he made the

13   point that -- which is unique to generic work

14   analysis, that there are lots of "does not

15   apply" responses in any sort of occupational

16   level profile that would be generated.   So in

17   any individual case, a large part of the O*NET

18   descriptors in whatever domain are not going

19   to be relevant to describing that particular

20   occupation.

21   And   so   when   you   calculate

22   reliabilities on the entire profile, you get

1   numbers that look pretty respectable, but he

2   presented data that seem to -- when you

3   calculate the reliability on just those things

4   that are relevant, there are dramatic,

5   breathtaking, shocking declines in terms of

6   the stability of these data.

7   So I guess my question is: was

8   there something unpersuasive about that data?

9   Or why is it that the panel seemed to come to

10   the conclusion that there were unclear

11   measurement effects?

12   MS. HILTON: Do you mean, how did

13   we come to the conclusion that the effects on

14   measurement error are unclear, because every

15   new method adds to the uncertainty?

16   MEMBER WILSON: Well, I just meant

17   that that data was pretty persuasive to me,

18   and its impact in terms of the following panel

19   discussions, you know, I mean, it just seemed

20   like that presentation sucked a lot of air out

21   of the room in terms of, you know, I mean,

22   there were people that seemed shocked when

1 they saw the reliability coefficients that

2 were calculated on some of these data that

3 people are using that appear to be almost

4 noise.

5   I guess that's what I'm saying is

6 is that why -- my question is: was there

7 something about that presentation that was

8 unpersuasive with regard to measurement error?

9   Or why was there the conclusion that

10 measurement error effects were unclear? Is it

11 just because of the multi-method, is that what

12 you're saying?

13   MS. HILTON: Right.   That

14 conclusion is really focusing on the whole

15 multi-method issue.

16   MEMBER WILSON: Yes.

17   MS. HILTON: It relates to the

18 whole issue of using job incumbents, but also

19 occupational analysts.

20   MEMBER WILSON: Right.

21   MS. HILTON: The fact that job

22 incumbents have strengths and weaknesses as a

1 data source.

2 MEMBER WILSON: Right.

3 MS.   HILTON: They   have   the

4 strength, they -- obviously, they work in the

5 job, so they know something about it. But as

6 you very well know, there is a tendency for

7 job incumbents to inflate --

8 MEMBER WILSON: Absolutely.

9 MS.   HILTON: -- you   know,   the

10 abilities and skills of a job.   Similarly,

11 within occupational analysts, again, you have

12 strengths and weaknesses, strengths that you

13 are dealing with someone who is very well

14 trained to do this kind of ranking --

15 MEMBER WILSON: Absolutely.

16 MS.   HILTON: -- a weakness that

17 they are not as familiar with the job, with

18 the occupation, and depending on the quality

19 of information you provide to them, or whether

20 they would get a chance to actually go to the

21 field, which in O*NET case they do not

22 actually go. So that's what that conclusion

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1 is really based on.

2 MEMBER WILSON: Those are all

3 excellent points, especially that issue of

4 inability to observe. In fact, what I would

5 suggest is that that may be the reason why

6 some of these data were presented -- are what

7 they are, that these people aren't necessarily

8 providing data based on direct observations of

9 what actually occurred.

10 MS. HILTON: Yes.

11 MEMBER WILSON: And then, my --

12 it's not so much a question. It is taking me

13 a while, but I'm trying to learn from Tom and

14 Nancy. It seems like the sort of crux of the

15 discussion here, which your panel dealt with

16 and ours dealt with, and that I described to

17 you as sort of a fundamental distinction or a

18 different way of thinking, I suspect I know

19 who on the panel was more concerned about

20 disaggregation, because IO psychologists have

21 to deal with things at the organizational

22 level, at the job level. And I described it

1   there as a distinction between the econometric

2   and the ergometric approaches to doing work

3   analysis.

4   And I'm just wondering about your

5   thoughts.   I understand   the   efficiency

6   argument, and I very much understand the

7   currency argument. Shanan and I made some

8   presentations   where   there   is   good

9   interreliability here between what you are

10 recommending and what we said with -- you

11 know, you can have the greatest data system in

12 the world, and if it's not current, that is a

13 problem.

14   And you're right, as the number of

15 descriptors and the number of disaggregation

16 increases, there is definitely more data cost.

17   But I'm just wondering, is it possible that

18 the   sort   of   top-down   econometric,   more

19 rational, big picture is very different than

20 the   sort   of   bottom-up,   here   is   work   as   it

21 actually exists in the economy.   I mean, do

22 you have any thoughts on that?

1   Is that potentially an area where

2 we can sort of find that there really maybe

3 are two fundamental different approaches that

4 can't be very easily reconciled, and that

5 trying to reconcile them is always going to be

6 a sort of lever between either making the

7 econometric approach unhappy, because there is

8 too much detail, or, you know, perhaps moving

9 in the other direction now where there is

10 simply not enough detail from a defensibility

11 -- any thoughts at all on that or --

12   MS. HILTON: Do you have any

13 thoughts about that?

14   MR. PLEWES: Just hearing you, when

15 we had our meeting, and again now, we

16 certainly wish we had invited you to give a

17 presentation before the panel, because I think

18 some of these thoughts probably would have

19 been very valuable to them, and they would

20 have been willing to address them.

21   In their saying that they -- that

22 they like the idea, I'm putting words in

1 there, but the recommendation is that if we

2 don't change at least the linkage between the

3 SOC and the O*NET, that kind of they say that

4 the top-down approach -- that is, that the

5 importance of the linkage to the national

6 databases is very, very important.

7   Now, what they didn't do is take a

8 look at what you are suggesting, and that is

9 that there may be another way of looking at

10 this.   I didn't see evidence that they had

11 given that full thought.

12   MEMBER WILSON: Well, I certainly

13 agree, and I think that the sort of -- there

14 are a couple of questions here. One is the --

15 how do you describe the work? And, you know,

16 am I going to be able to defend whatever the

17 analysis is when Tom halls me into court? You

18 know, all those kinds of issues.

19   But I think you make an excellent

20 point that linkage back to what Social

21 Security is not going to be able to do is have

22 their own Bureau of Labor statistics and make

1 projections about where -- you know, so I

2 think that linkage -- and, in fact, we made

3 significant recommendations in that area to

4 link back to those systems. I think we are

5 very aware of the value of the econometric

6 approach and that -- from a sampling

7 standpoint.

8 In conclusion, I just -- welcome to

9 my world. I know that this is sort of a

10 departure from how you normally conduct

11 business and things of that sort. I very much

12 appreciate you being here. I mean it when I

13 say it -- you know, it has been an hour to

14 interact with you on these issues, and I

15 appreciate the expertise that you bring to

16 this topic.

17 So thank you.

18 MS. HILTON: Thank you. Thank you

19 for giving us an opportunity to share the

20 panel's work with you all.

21 CHAIR BARROS-BAILEY: Thank you.

22 Bob, do you have a question?

1   MEMBER FRASER: No, it's really

2 more of a comment. I'm a vocational

3 rehabilitation counselor and rehab

4 psychologist also, and I and the folks -- the

5 counselors in my unit, we do use O*NET for

6 purposes of vocational exploration and career

7 guidance.

8   But in responding to a company

9 relative to the legal defensibility whether a

10 person can do a job, we simply can't use it,

11 because it's functionally and skill-related,

12 etcetera, it's simply not discrete enough.

13 It's relative. So relative doesn't work, you

14 know, for us, and that's part of our charge

15 here in SSA.

16   And kind of going back to Dave's

17 comment, you know, or the issue is, can we

18 tweak these scales? Well, you know, we have

19 that problem with aggregation, you know, so

20 say we have 18 truck drivers in that

21 occupation. So we have anybody from an access

22 van driver to an interstate trucker, you know,

1 a wide variance in terms of the demands of

2 that kind of -- for those different types of

3 jobs.

4 So I just don't see how, in an

5 interagency effort, how we could work on this

6 tweaking with this core problem of aggregation

7 being an occupation versus the range of jobs

8 being represented.

9 MEMBER SCHRETLEN: In fact, as I

10 was thinking further about it, I thought maybe

11 I was not very clear in my question. But just

12 sort of following up on that, I think the idea

13 of what a modified O*NET system might look

14 like, I'm trying to envision that.

15 And it seems as though, based on

16 the things that you have said in your report,

17 the limitations of O*NET that you have

18 acknowledged or recognized, that at minimum a

19 modified system would need to not merely add

20 more specific jobs, but actually replace a lot

21 of the occupations, because they are so

22 broadly aggregated, or occupational units,

1 because Social Security simply cannot compare

2 an applicant to an occupational unit. They

3 have to compare them to jobs, specific jobs,

4 or, you know, clusters of jobs.

5   So it would at least require a very

6 broad supplementation, if not a complete

7 replacement, of those occupations, that the

8 abilities that are rated, the job

9 characteristics that are rated would have to

10 be more specific. And if they're more

11 specific, you can't -- you would have to go

12 back either to previously evaluated ones and

13 add those, or start from scratch with new

14 ones, and evaluate those new dimensions of job

15 characteristics.

16   And in any case, you would have to

17 go back, because the bars are problematic.

18 And in a sense, you would have to revalidate

19 all of the ratings across the entire system,

20 and that's why I'm saying I just don't -- it's

21 hard for me to imagine how -- I mean, we can

22 use the word "modification," but it's a -- it

1 would be a radically different system. That's

2 the only thing that I can imagine. I mean,

3 can you imagine -- can you help me imagine

4 some way that it's not that?

5   MS. HILTON: I have a very weak

6 imagination.

7   (Laughter.)

8   But I guess what I wanted to

9 mention is that this whole issue of, you know,

10 once you've created something, and O*NET is

11 very big, do you want to change it? Can you

12 change it? If you change it, will it disrupt,

13 you know, what we have in place?

14   And I guess I would just say that

15 our panel felt that it was worth causing some

16 disruption if it would result to longer-term

17 improvements in the quality of the data. So I

18 think that's true of any database. If you go

19 ahead and create your own, I mean, that's

20 something that you will always have to be

21 thinking about, because it's not like you just

22 create an occupational database at one point

1   in time and just leave it. So --

2   CHAIR BARROS-BAILEY: Nancy?

3   MEMBER SHOR: Thank you. I want to

4   thank you very much for coming. This has

5   really been fascinating. I am interested in

6   what sort of response you have received

7   formally, informally, that you expect to

8   receive from the Department of Labor, that we

9   -- we are kind of asking you questions about

10   how O*NET could be modified, how O*NET could

11   be changed, and I think in many ways those

12   questions really are best directed to them.

13   But, you know, your process is

14   extremely familiar to you, but not to me. Is

15   there a role, has there been a role, do you

16   anticipate a reaction from them?

17   MS. HILTON: Well, we had a

18   briefing with them in late November, and they

19   seemed really interested in a whole report.

20   They are very surprised by some thing, like

21   when we mentioned that green jobs might not --

22   might be a distraction from the core database

1   they all like were shocked, because they are

2   very focused on green jobs these days.

3   Since that initial briefing, we

4   haven't really heard from them. As Tom was

5   mentioning at breakfast, we think that when

6   the printed report comes out that they will

7   pay more attention once again. I can say with

8   specific regard to that recommendation for a

9   joint interagency task force that they were

10   very interested. They thought -- they seemed

11   to think that that would be a great idea, that

12   they would love to coordinate more closely

13   with SSA.

14   CHAIR BARROS-BAILEY: And when I

15   started the meeting, I talked about what the

16   Commissioner has asked us to do in terms of

17   the four points. And one of them was the

18   recruitment, training, and certification of

19   field job analysts. So I was looking for a

20   lot of that information in your report to see

21   how the panel came at that.

22   And the sense I get is that it

1 wasn't really even a question addressed. And

2 my question, because I'm a little intrigued by

3 that, my question is, especially in light of a

4 whole chapter on technology, when the APDOT

5 was looking at data collection methods, and

6 ruled out the use of field job analysts, the

7 technology was very different then. There has

8 been a lot that technology has done in the

9 last 20 years.

10   So was there -- I'm just wondering

11 why there has -- there wasn't even a question

12 of the use of field job analysts and data

13 collection with O*NET, in light of the fact

14 that it had been almost 20 years since the

15 APDOT started their work that led to a lot of

16 the decision-making and design.

17   MS. HILTON: I guess I would just

18 say that the -- that issue appears slightly in

19 Chapter 2 in the whole discussion of the data

20 collection and the fact that the occupational

21 analysts in O*NET don't go to the field and

22 don't -- you know, they only receive paper

1 descriptions.

2   But it wasn't something that our

3 panel really looked at, because we were trying

4 to look at O*NET as it is now. Actually, I

5 don't know whether it's still relevant, but if

6 you are interested in this whole question

7 about field job analysts you might want to go

8 back and look at the 1980 report, because they

9 found a lot of problems where those field job

10 analysts were not following the protocols that

11 had been developed nationally, and also they

12 weren't even finding enough -- there were

13 supposed to be at least three analysts I

14 believe rating every job title, and in a lot

15 of cases there was only one or two.

16   So it is a very complicated issue,

17 and there might still be something in that

18 older report that would be relevant, as you

19 think about that now.

20   CHAIR BARROS-BAILEY: Thank you.

21 Dave?

22   MEMBER SCHRETLEN: Yes, one other

1 question about the recommendation to focus

2 resources on core database activities, leaving

3 development of most new applications and tools

4 to others.

5   If Department of Labor asked you,

6 would you regard expanding the use of the

7 O*NET to make it suitable for disability

8 determination a core part of the database

9 activities, or is that one that you would

10 advise them to farm out to others?

11   MS. HILTON: Well, that's one

12 reason we suggested a user advisory panel to

13 try to deal with some of those issues. But,

14 you know, we definitely recognize that

15 different users have different needs, and this

16 whole area of application -- yes, it's -- you

17 raise a very good question. That's all I can

18 say. I don't have the answer to it, but it's

19 an important point.

20   CHAIR BARROS-BAILEY: Tom asked

21 some questions about skills. And I noticed

22 there was not a discussion about the

1   application or the importance of skills and

2   skills transfer within Chapter 8, but there

3   was in other areas of the report a lot of

4   discussion about skills.

5   As a matter of fact, Chapter 10,

6   the number one priority in terms of all of

7   your recommendations is conducting research on

8   the content model, beginning with skills and

9   knowledge demands.

10   MS. HILTON: Right.

11   CHAIR BARROS-BAILEY: And I know

12   your report talks about that there were even

13   problems of how to define skill, and I think

14   there were like four or five different

15   definitions, and then the one that was arrived

16   at was -- which was sociotechnical skills, it

17   indicates that there was a view that this was

18   the most prominent. There was no underlying

19   researcher data to bolster that decision. So

20   what is currently being used as a theoretical

21   framework for skills does not have a body of

22   research.

1   Are you aware of how skills domain

2   within the content model for the O*NET is

3   applied, or can be applied in disability, or

4   any transferable skills assessment?

5   MS. HILTON: Not specifically with

6   regard to disability, but in Chapter -- I

7   think it's Chapter 6 in the workforce

8   development chapter, we talk about a number of

9   electronically created databases that link the

10   various domains in O*NET -- skills, abilities,

11   knowledges -- and compare that with what an

12   individual has, what they think their level of

13   it is, and then it can be linked to other

14   jobs. So there is some progress being made in

15   that area.

16   CHAIR BARROS-BAILEY: And I think

17   one that I saw on the O*NET Academy was one

18   called TORQ.

19   MS. HILTON: Yes.

20   CHAIR BARROS-BAILEY: And that

21   talks about an RV team assembler in northern

22   Indiana, where, through that system, the

1 transferable skill that is derived is a dental

2 hygienist.

3   MS. HILTON: Oh, right.

4   CHAIR   BARROS-BAILEY: But   in

5 disability determination, retraining cannot be

6 considered   when   looking   at   transferable

7 skills.   We're looking at residual, not rehab

8 potential.

9   MS. HILTON: I see.

10   CHAIR   BARROS-BAILEY: So   in   that

11 instance, I haven't found a way to be able to

12 use any of the O*NET data for transferable

13 skills assessment, where we are looking at

14 residual issues instead of rehab potential.

15 Have you seen that application whatsoever?

16   MS. HILTON: I guess I -- I am not

17 that familiar, but what is just popping to

18 mind -- and I don't know that this is really

19 ever done.   I am more familiar with the

20 applications that I mentioned to you, like

21 TORQ.

22   It seems that, in theory at least,

1 that a person could use O*NET, or a counselor

2 working with a person could use O*NET, and

3 whatever jobs, occupations they had had in the

4 past, jobs could be linked to O*NET

5 occupations, and then the level of the

6 different skills, knowledges, and so forth,

7 required in those previous occupations could

8 be identified.

9 Then, it would be possible to

10 identify other occupations that use those same

11 levels of skills and identify a new

12 occupation, without requiring any training in

13 between, if you see what I mean.

14 CHAIR BARROS-BAILEY: Yes. And I

15 think -- I think when we look at the

16 occupational unit that is representative of

17 the team assembler and the dental hygienist,

18 and we look at the DOTs -- the aggregated

19 initially under those OUs, they were pretty

20 heterogeneous as opposed to homogeneous, and a

21 lot of other --

22 MS. HILTON: Yes.

1   CHAIR BARROS-BAILEY: And so it was

2   still -- it would be very difficult for me as

3   a vocational expert to have Nancy or Tom

4   cross-examine me and say, "How did I go from a

5   team assembler to a dental hygienist?" in

6   terms of transferability.

7   MS. HILTON: I see.

8   CHAIR BARROS-BAILEY: Particularly

9   if I can't consider retraining.

10   MS. HILTON: And proving that they

11   really were capable of becoming the dental

12   hygienist without any retraining, is that what

13   you're saying?

14   CHAIR BARROS-BAILEY: Correct.

15   MS. HILTON: Yes.

16   CHAIR   BARROS-BAILEY: Or

17   licensing --

18   MS. HILTON: Yes, right.

19   CHAIR BARROS-BAILEY: -- in many of

20   the states.

21   MS. HILTON: Right, right.

22   CHAIR BARROS-BAILEY: Okay.   Any

1   other questions? Deb?

2   MEMBER   LECHNER: I   get   the

3   underlying current from your report that one

4   concern   about   maintaining   two   separate

5   databases is the cost effectiveness issue of

6   Social   Security   Administration   maintaining   a

7   separate database from Department of Labor.

8   But I didn't see anything in the

9   report that spoke to the cost effectiveness of

10   the   data   collection   methodology   used   by

11   Department of Labor at the present time.   And,

12   you know, when you look at 100 occupations a

13   year, and $6 million a year to maintain an

14   updated database, that sort of rounds out to

15   $60,000 per occupation, so -- which I find is

16   really an astounding number.

17   So I just wondered if there was any

18   consideration   to   the   current   cost

19   effectiveness of the process.

20   MS.   HILTON: I   guess   the   --   we

21   didn't really reach a conclusion here, but we

22   did talk at least -- I think in two places in

1 the report we talk about the whole tradeoff

2 question. There was certainly an idea that if

3 some research was conducted on some of these

4 domains and descriptors that perhaps not all

5 of those descriptors were necessary, because

6 there are 239, which is a very lot. Maybe

7 that's why it costs $60,000.

8 So if research would find that

9 there would not need to be quite so many

10 knowledges or skills or problem-solving, which

11 appears in four different places, so that what

12 -- it's called pruning, the idea of pruning it

13 down a little bit, that would definitely

14 improve the cost effectiveness of it.

15 But we didn't go specifically into

16 the costs of, you know, doing surveying job

17 incumbents versus using occupational analysts,

18 and so forth. We didn't have the data to do

19 that for one thing.

20 CHAIR BARROS-BAILEY: Any other

21 questions?

22 (No response.)

1   Okay.   I have one last question.

2   And you just heard from Deb Lechner. Deb is

3   the person that I mentioned when I met with

4   you, that she and Joe had done the study that

5   is mentioned in Chapter 8 in reference to the

6   IOTF. And that reference in Chapter 8 makes

7   it seem like the concept of the O*NET D was

8   being tested by that study, and in reality

9   that was a study of field job analysts.

10   And I -- is that an area of the

11 report that has been corrected in terms of a

12 clarification of what -- how that study is

13 represented?

14   MS. HILTON: Yes, we did make that

15 change.

16   CHAIR BARROS-BAILEY: Thank you.

17 Thank you.

18   Any other questions from the panel?

19   (No response.)

20   Thank you.   It has been a great

21 pleasure to have you here.   I think our

22 discussions are really important. There are a

1   lot of things that I learned in terms of your

2   process, in terms of where the report was

3   issued along that process.   There were some

4   conclusions that I was coming to in terms of

5   what your report meant within that context

6   that I think were clarified today.

7   And I do want to point out to

8   everybody that there was a section of your

9   report on page 1-11 that I thought was really

10   important in terms of the distinction between

11   what we're doing here and the fact that we are

12   a panel that keeps on going, and that your

13   panel was really time-limited. And so I think

14   that's important to understand reports and

15   context.

16   And in page 1-11, it says in some

17   cases the evidence that could be assembled and

18   considered with the available resources and

19   within the timeframe of study was

20   insufficient, leaving the panel with

21   unanswered questions. And so I think that's

22   really important for us to acknowledge, that

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1 what you said at the very beginning of your

2 presentation, that there were some areas that

3 you just didn't have an opportunity to

4 address.

5   And so I know some of our questions

6 are way more detailed than you had the

7 opportunity to cover. And so I thank you for

8 the time that you have spent with us today,

9 for answering our questions, and for the

10 opportunity to speak with you.

11   It looked like Mark wanted to say

12 something. Did you want to say something?

13 Okay.

14   MEMBER WILSON: Just more of a

15 comment in terms of this, because I think it's

16 a very relevant issue, this sort of cost-

17 benefit analysis, and the resources required

18 to keep things current and up to date.

19   And if you look at it from a sort

20 of classical occupational analysis standpoint,

21 and you're the Department of Labor, where this

22 is a relatively small, you know, potentially

1 in some bureaucrats' minds, insignificant part

2 of what the Department of Labor is all about,

3 the resources that one might devote to that,

4 and the justification for those resources is

5 very different than, you know, I perhaps I

6 should have, but it wasn't until fairly far

7 into the process that I understood the scale

8 of the operation on which Social Security

9 operates, the underlying industries, in terms

10 of private insurance.

11   So   the   costs   in   terms   of

12 litigation, the costs in terms of getting this

13 right, are enormous. And so if you look at it

14 as a percentage of DOL's budget, in terms of

15 what might be devoted to this issue, you might

16 come to a very different cost-benefit analysis

17 than if you look at it in terms of the $140

18 billion, plus perhaps another $140 billion in

19 private benefits in terms of justifying the

20 effort to do a more bottom-up, job-oriented,

21 more detailed set of descriptors. Just a

22 thought.

1   CHAIR BARROS-BAILEY: Thanks, Mark.

2   And that was something we talked about when

3   we met with you in January, the $140 billion a

4   year that is used -- spent by Social Security

5   on disability for beneficiaries and their

6   dependents, $128 billion of that for

7   beneficiaries.

8   And if we would take that

9   equivalent amount of money and apply it to the

10 federal budget, in terms of the discretionary

11 spending, that it would equate to about 14

12 budgets of federal agencies including NASA,

13 including the federal courts, including the

14 executive office, including Congress. When we

15 started adding all of those up, it was pretty

16 huge to see the impact of disability. And

17 that was jus t he federal impact; it didn't

18 include private insurance.

19   And so you could see that we are

20 very passionate as a panel in terms of what we

21 are doing, because this has huge implications

22 to people we see on a daily basis.

1   So I want to thank you again. We

2   recognize that disability determination, and

3   its application in terms of the O*NET, was but

4   one of the many parts of the O*NET that your

5   panel evaluated.   And there were time and

6   resource issues that you could not control

7   that caused limitations and delimitations to

8   the scope of your work.

9   We want to thank you for your time

10   to come here to St. Louis and be with us here

11   to present in terms of the panel's findings.

12   We recognize your hard work over there.   We

13   recognize it. And you worked for over a year

14   on it, and I know that you continue to work.

15   One of the things we talked about

16   over breakfast was how long after a panel

17   finishes its work do you present, and you said

18   it could be years that you might be presenting

19   on this. So we know that it continues for

20   you, although the panel has been disbanded.

21   So we want to thank you for your

22   insights.   They   have   been   tremendously

1   helpful, and that you have provided to us as

2   we report back to Commissioner Astrue in terms

3   of our findings.

4   Thank you.

5   MS. HILTON: Thank you for inviting

6   us.

7   CHAIR BARROS-BAILEY: Okay. We

8   will take a 15-minute break and resume our

9   meeting.

10 (Whereupon, the proceedings in the foregoing

11   matter went off the record at 10:46

12   a.m. and went back on the record at

13   11:12 a.m.)

14   CHAIR BARROS-BAILEY: Okay. Let's

15 come back on the record, please.

16   I think that the meeting this

17 morning was incredibly valuable. I learned a

18 lot from the process. One of the things that

19 most stood out for me was that although our

20 report is referenced in Chapter 8, when I

21 talked to Margaret about that and its

22 reference in the very first page, the National

1 Academies of Science panel did not deliberate

2 on our report.

3 As a matter of fact, they got it

4 after the panel was disbanded. And so their

5 recommendations at the end of the chapter have

6 nothing to do with the content of our report.

7 In fact, there is no contradiction between

8 their conclusions and our report. There is no

9 contradiction in terms of what they say in

10 recommendation number one in terms of looking

11 and analyzing the user needs for SSA, and the

12 fact that that had already been done in our

13 report.

14 So it was a timing issue, but the

15 way it's reflected in Chapter 8 is it almost

16 seems like our report having been referenced

17 or cited in the first page, that it became a

18 filter for the rest of the chapter when it was

19 not the case. It was something they added

20 later on to try to make it as complete as

21 possible.

22 And so when I talked to Margaret

1   about the potential of making a clarification

2   in Chapter 8 about that, as she was willing to

3   make a clarification about Deb's research back

4   when she was with IOTF and the fact that it

5   wasn't testing the O*NET D concept, it never

6   got that far way back then, they are so far

7   along in their process with the National

8   Academies of Science in terms of the

9   publication of the final report that they

10   cannot make that clarification.

11   And so I indicated to her that that

12   would probably be a clarification that would

13   be included in our report back to the

14   Commissioner, because I think it's a very

15   important one. Particularly, we are very

16   sensitive in this panel to how people read

17   flat documents in context of time with what we

18   experienced in January, some people going to

19   subcommittee reports that don't reflect the

20   final recommendations that appeared in our

21   final report to the Commissioner.

22   So I wanted to -- I think we got a

1 lot of information that we potentially have

2 the need -- more than just the few minutes we

3 have allocated for this meeting before we end

4 or adjourn for the day to really discuss. And

5 so I wanted to see if maybe we could talk

6 about the implications of what we learned for

7 a couple of things that we've talked about

8 over the last day and a half and the agenda.

9   National   Academy   of   Science

10 roundtable, the OIS-1 study, but I think it

11 merits a lot more discussion than we have time

12 for. And so I would propose that we consider

13 doing a teleconference at some point in the

14 next few weeks to address the broader issue in

15 terms of the takeaways and how this might

16 affect our advice and recommendations back to

17 SSA.

18   So let me open it up in terms of

19 the implications to the couple of things that

20 we have been talking about the last couple of

21 days. First, the National Academy of Science

22 roundtable, meaning not just dealing with the

1 O*NET issues, but we had discussed yesterday

2 about the DOT issues, you know, the

3 implications of this report overall, not just

4 Chapter 8, and the implications of the Miller

5 study from 1980 in terms of the overall design

6 and recommendation issues.

7 Any thoughts about any changes, of

8 whether we need to have that, how we need to

9 have it?

10 MEMBER WILSON: Just a point of --

11 are we still in a public meeting? I notice

12 our name tags are gone.

13 (Laughter.)

14 CHAIR BARROS-BAILEY: I think the

15 staff is just being a lot more efficient, but

16 I think I know who you are. So, yes, we are

17 in the public meeting.

18 Okay. Let me -- Sylvia, go ahead.

19 MEMBER KARMAN: Well, one thing is

20 is that it -- as we are anticipating the

21 National Academies of Science's final report

22 at the end of April, depending on when that

1 report -- final report comes out, we may want

2 to adjust the timing that we were thinking

3 about for the National Academies of Science

4 subject matter, at least roundtable.

5   So that may -- that just might be

6 something that we may want to tackle, because

7 we did talk about that yesterday in terms of

8 possibly having that in June. All things

9 being equal, that might be a good idea, but

10 then again, on the other hand, if we don't

11 receive the report until, you know, the end of

12 April, possibly even May, we certainly want to

13 have enough time for all of the people we

14 would invite to that panel, as well as

15 ourselves, to have time to read it and really

16 reflect on it.

17   So, I don't know, I am just putting

18 that out there. That's one thing.

19   MEMBER WILSON: I agree. I think

20 there is no rush. I am not opposed to having

21 some sort of teleconference on -- to sort of

22 process some of the things that we heard here

1   today, but I think it's important to have the

2   report in hand, the final report, have read it

3   and digested it. You know, I saw a lot of

4   people taking lots of notes and stuff, so, you

5   know, I doubt that we will forget any of that.

6   So --

7   CHAIR BARROS-BAILEY: Okay. Thank

8   you. And Allan?

9   MEMBER HUNT: I was just going to

10   point out that the final report is not going

11   to be materially different from what we've

12   seen,   because   obviously   their   process

13   prohibits that. So --

14   CHAIR   BARROS-BAILEY: Okay.   So

15   what I'm hearing and seeing around the table

16   is   that   the   roundtable   concept   is   on   the

17   table, very much so, moving forward.   And

18   there might be some variation in terms of what

19   we had put the timeline to be within the road

20   map that we discussed yesterday.

21   Shanan?

22   MEMBER GIBSON: I was going to say

1 one thing we might consider, though, is based

2 on the responses here, and our understanding

3 of how the panel operates, I think we should

4 probably, as part of this teleconference,

5 discuss our expectations for what we will

6 achieve through this roundtable.

7   CHAIR BARROS-BAILEY: The Four

8 Square Document, excellent. Thank you.

9   MEMBER SCHRETLEN: Yes, that's -- I

10 was just going to say that it calls into

11 question in my mind, what is the purpose of

12 the roundtable? Do we need to visit that and

13 ask ourselves as a panel what -- what we --

14 what our goals -- what we want to accomplish.

15   CHAIR BARROS-BAILEY: Okay.

16   MEMBER KARMAN: I guess we should

17 definitely consider that over the next few

18 weeks. And then, when we meet again, we

19 should, you know, talk -- discuss it and just,

20 like you said, revisit the purpose, given the

21 responses we had.

22   I do know that we have many more

1 questions, but you're right, I mean, it may

2 not -- it may not --

3   MEMBER SCHRETLEN: It raises in my

4 mind the question of might our time be better

5 served doing other things than a roundtable,

6 like spending time talking about how to

7 respond to this, or how this panel might

8 advise SSA to respond.

9   MEMBER GIBSON: I would concur with

10 that, and I would just say, though, I do want

11 to -- that we mentioned the fact that the NAS

12 roundtable will also be taking a secondary

13 look at the original report, not just this

14 report. So there does still leave that one

15 particular issue on the table.

16   CHAIR BARROS-BAILEY: And I think

17 there were a lot of questions that were more

18 technically oriented, where there were members

19 of the National Academies of Science, O*NET,

20 and DOT roundtables that addressed more

21 technical aspects beyond obviously Chapter 8,

22 that might be beneficial in terms of the

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1   research process.

2   You know, when we look at some of

3   the things that have been -- we have been

4   asked to provide advice and recommendations

5   on, in terms of data collection and field job

6   analysts, what they found with DOT and, you

7   know, 30 years ago why it was addressed or not

8   addressed, some of those scientists might have

9   some thoughts about that in this report, you

10 know, other methods for data collection, same

11 thing with sampling, some of the linkage

12 issues -- that might be helpful.

13   MEMBER SCHRETLEN: If they would

14 attend.

15   CHAIR BARROS-BAILEY: If they would

16 attend, absolutely.

17   Mark?

18   MEMBER WILSON: Yes.   I think

19 that's the issue, and it's an excellent point.

20   In terms of what the roundtable would be, my

21 plans were always to recommend that it be very

22 similar in format to the one I attended that

1 Dave had organized, where we as a panel,

2 certainly those interested would formulate a

3 set of questions that the technical experts

4 would be asked to address. And that wouldn't

5 be the only thing, but that would be the start

6 of the discussion.

7 And I think the area that remains

8 unexplored, in terms of looking at various

9 recommendations in the NAS report, were some

10 of the issues that Shanan and I were -- you

11 know, can you tell us about the reviews? Can

12 you tell us who wrote this? There aren't that

13 many experts, and so, assuming that they would

14 come, the IO psychology panel members of NAS

15 and some people who were involved in the

16 original DOT report, are the obvious invites

17 to this.

18 But if they were not -- if

19 significant or all numbers -- or all of them

20 were not able to attend, then I think it would

21 potentially be something that we would have to

22 reexamine as to whether or not it was

1 Research Committee and reading the NAS report,

2 what questions the various panel members have

3 and, you know, that is kind of a moot point

4 now, but I would certainly be interested in,

5 well, were we able to assemble an august body

6 of work analysis experts who are expert, what

7 questions would you want to ask them? What

8 issues should they address that were similar

9 to the kinds of questions that, you know,

10 David was asking his people?

11   MEMBER KARMAN: I appreciate that,

12 because I am thinking that as we formulate the

13 questions or purpose around what we might want

14 to do in terms of a roundtable, and then ask

15 ourselves, gee, you know, is there perhaps a

16 better way for us to attain these answers to

17 these questions than doing that? You know,

18 perhaps there is some other method or

19 approach.

20   Because, you know, to the extent

21 that we would be asking additional questions

22 and maybe -- specifically, with regard to that

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1 particular report, in its final form or pre-

2 publication, is for us as a panel to be able

3 to reconcile for Social Security the

4 recommendation that, well, there is this

5 modification notion on the table with regard

6 to O*NET, and its use -- possible use for

7 Social Security, which Social Security has

8 looked at.

9   And also, the recommendations in

10 the report itself that really get at the data

11 quality issues, and how can we deal with that

12 as a panel moving forward and making

13 recommendations to Social Security about the

14 development of its occupational information

15 systems.

16   And it may be, as David pointed

17 out, and, Mark, you also seconded it, that

18 maybe there are better ways of getting at

19 that.

20   MEMBER SCHRETLEN: And I just think

21 it might be very useful for all of us to think

22 about what we might do, in a sense kind of

1   preemptively, or prospectively, and do we want

2   to wait until the Department of Labor reaches

3   out and makes some overture, or do we want to

4   anticipate that with something and say, in

5   case you are thinking about reaching out and

6   making some overture --

7   (Laughter.)

8   -- here are some preliminary

9   thoughts, before you decide whether or not you

10   might want to form some kind of interagency.

11   Just to make it clear what their -- how steep

12   the mountain is.

13   MEMBER KARMAN: In fact, I am kind

14   of glad you mentioned that, because one of the

15   things that has come to mind is that in the

16   discussion that we had earlier, David, when

17   you had raised the issue of the bars, for

18   example, the behaviorally-anchored ratings,

19   and Tom Plewes had suggested that, well, you

20   know, these are things that could be studied,

21   you know, perhaps a comparison of the current

22   anchors with things that may or -- may be more

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1 useful to Social Security, or measures that

2 may be more useful.

3   I am thinking that that may be

4 something that could be readily integrated,

5 that kind of a study may be a point that may

6 be readily integrated into the OIS design

7 study, may give us some traction on that issue

8 early on, at least to take a look at that, and

9 be in a position to say to the Department of

10 Labor, or whomever, "Well, you know, we

11 actually did take a look at that and here is

12 what we found."

13   MEMBER SCHRETLEN: So we could

14 conceivably respond to that, both rationally

15 and empirically.

16   MEMBER KARMAN: Yes, sir.

17   CHAIR   BARROS-BAILEY: With

18 something that is happening right now. So, I

19 mean, what kind of became evident from the

20 discussion this morning is that we are

21 delivering on -- what has happened

22 chronologically is beyond -- is happening

1 beyond what the recommendations imply. I

2 mean, they implied something that is static in

3 time for them in August of last year.

4   And we are -- we are, what, about

5 seven months beyond that, and so, you know,

6 they even mentioned in their -- I think it was

7 Tom who said, "We anticipated you." And "you"

8 meaning the recommendations that we had and

9 the information that we had in our report. So

10 I think it's kind of a timing issue.

11   Okay. So we've talked about the

12 roundtable. We have talked about the

13 implications for study. We have talked about

14 a teleconference. I am going to ask Debra

15 Tidwell-Peters to scan for dates for a

16 teleconference for us to maybe process this

17 particular topic further.

18   Anything else in terms of specific

19 to this topic that we need to discuss at this

20 point?

21   (No response.)

22   Okay. Then, I am going to take us

1 through the rest of the agenda, so we can

2 finish on a timely basis today.

3 Okay. We have a couple of things

4 to include on the agenda, approval of minutes.

5 Elena e-mailed us all, and we got copies of

6 the minutes earlier this week. I would

7 entertain a motion to approve the minutes.

8 MEMBER GIBSON: So moved.

9 CHAIR BARROS-BAILEY: Shanan moved.

10 Do I have a second?

11 MEMBER WILSON: Second.

12 CHAIR BARROS-BAILEY: Mark seconded

13 the approval of the minutes. Is there any

14 discussion?

15 MEMBER HARDY: Yesterday I gave

16 some corrections to Debra Tidwell-Peters.

17 They were purely spelling and editing things,

18 and I believe that these minutes would be with

19 those corrections. I just wanted to put that

20 on the record.

21 CHAIR BARROS-BAILEY: Okay. So

22 there were some typographical kinds of

1   corrections. And I'm assuming what will go up

2   on the website will be the corrected minutes.

3   Any other discussion?

4   (No response.)

5   All those in favor?

6   (Chorus of ayes.)

7   Okay. Opposed?

8   (No response.)

9   That was unanimous. The minutes

10   have been approved.

11   Let's open up very quickly the

12   discussion for the agenda for June. If we

13   looked at our road map, there is probably a

14   lot that is going to be going on. I know that

15   there is going to be a lot going on between

16   now and June in terms of the public feedback

17   period from many different ways, probably the

18   electronic collection of the information, the

19   review of that information.

20   A lot of us are going to be on the

21   road quite a bit over the next few months, and

22   so we -- that is probably going to be a big

1   area that we are going to be reviewing in

2   terms of the public feedback. We are going to

3   be having probably a lot of organizations

4   providing us feedback in terms of the report,

5   so I anticipate that is going to be a big

6   area.

7   I think there are going to be a

8   couple of technical reports that may be

9   offered at that time, so we will probably have

10   presentations around those.   I'm assuming

11   research in terms of maybe some of what we're

12   going to be talking about with the NAS at the

13   teleconference we may need to include in

14   there.

15   Any other thoughts? Allan?

16   MEMBER HUNT: Labor market.

17   CHAIR BARROS-BAILEY: Labor market,

18   yes, absolutely, the roundtable.   That is

19   going to be a big one that we will need to

20   talk about in terms of consideration for the

21   agenda.

22   Deborah?

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1   MEMBER LECHNER: I   think   we

2   probably would have a report -- some sort of

3   report   on   the   recommendations   for   the   job

4   training and certification of job analysts --

5   CHAIR BARROS-BAILEY: Yes.

6   MEMBER LECHNER: -- at that point.

7   CHAIR   BARROS-BAILEY: There   is

8   probably going to be quite a bit happening in

9   the next few months on that as well, yes.

10   Tom?

11   MEMBER HARDY: You are looking at

12   possibly having a draft content model by May

13   from   the   workgroup?   Are   we   going   to   be

14   looking at that, do you think, or will that

15   still not be quite ready?

16   MEMBER KARMAN: Well, it certainly

17   is   on   track   for   us   to   be   working   with   the

18   workgroup to finish our considerations around

19   the   person-side   elements   for   the   content

20   model.   So I am not sure whether or not we

21   will have something to share with the entire

22   panel in June, but that's where we're headed,

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1   anyway, as far as drafts are concerned.

2   CHAIR BARROS-BAILEY: I think from

3   an administrative standpoint I got a lot out

4   of the training, the professional development,

5   and I want to thank you again for doing that,

6   Mark and Shanan. And so we will be looking at

7   and might also kind of scan for other areas

8   that people would really want to see

9   additional training about.

10   I know we talked about the legal

11   issues, in terms of defensibility, and, you

12   know, is June a good timing, is there a lot

13   going on in June, might we do it another time.

14   So we will probably scan for that as well in

15   terms of professional development.

16   Okay. Any other considerations for

17   the agenda for June?

18   (No response.)

19   Hearing none, I would entertain a

20   motion to adjourn our second annual quarterly

21   meeting for the OIDAP.

22   MEMBER HARDY: I make a motion to

1 adjourn.

2   CHAIR BARROS-BAILEY: So moved by

3 Tom. Seconded by Allan?

4   MEMBER HUNT: Yes, I second the

5 motion.

6   CHAIR BARROS-BAILEY: All those in

7 favor?

8   (Chorus of ayes.)

9   I'll note that was unanimous, and

10 we are adjourned.

11   Thank you.

12 (Whereupon, at 11:34 a.m., the proceedings in

13   the   foregoing   matter   were

14   adjourned.)

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TAB C

Appendix C: Timeline of NAS O*NET Panel and OIDAP Activities
(February 2009 through May 2010)

2009 — 2010

NAS O*NET Panel Activities

First Public Workshop: **SSA presents on the use of the O*NET in disability adjudication**

Second Public Workshop

Panel **Deliberations & Final Recommendations**

Panel Disbands & Report Enters Review Process

NAS Staff Cites OIDAP Report w/o NAS Panel Review

Pre-publication Copy of O*NET Report

Study Staff Presents to OIDAP

Final Report Released

March 26   **April 17**   **April**   **August**   **November**   **December 4**   **March 25**   **May 11**

February 23-25

Inaugural Meeting

Quarterly meetings, subcommittee research and discussions, roundtables, and development of subcommittee recommendations reports

September 1-30

9/1: Final Subcommittee Reports Due
9/9: **DRAFT report to Panel**
9/16-17: **Deliberations & Final Recommendations** to SSA
9/30: **Final Recommendations Report** to Commissioner Astrue

Panel Continues throughout Research & Development Phase

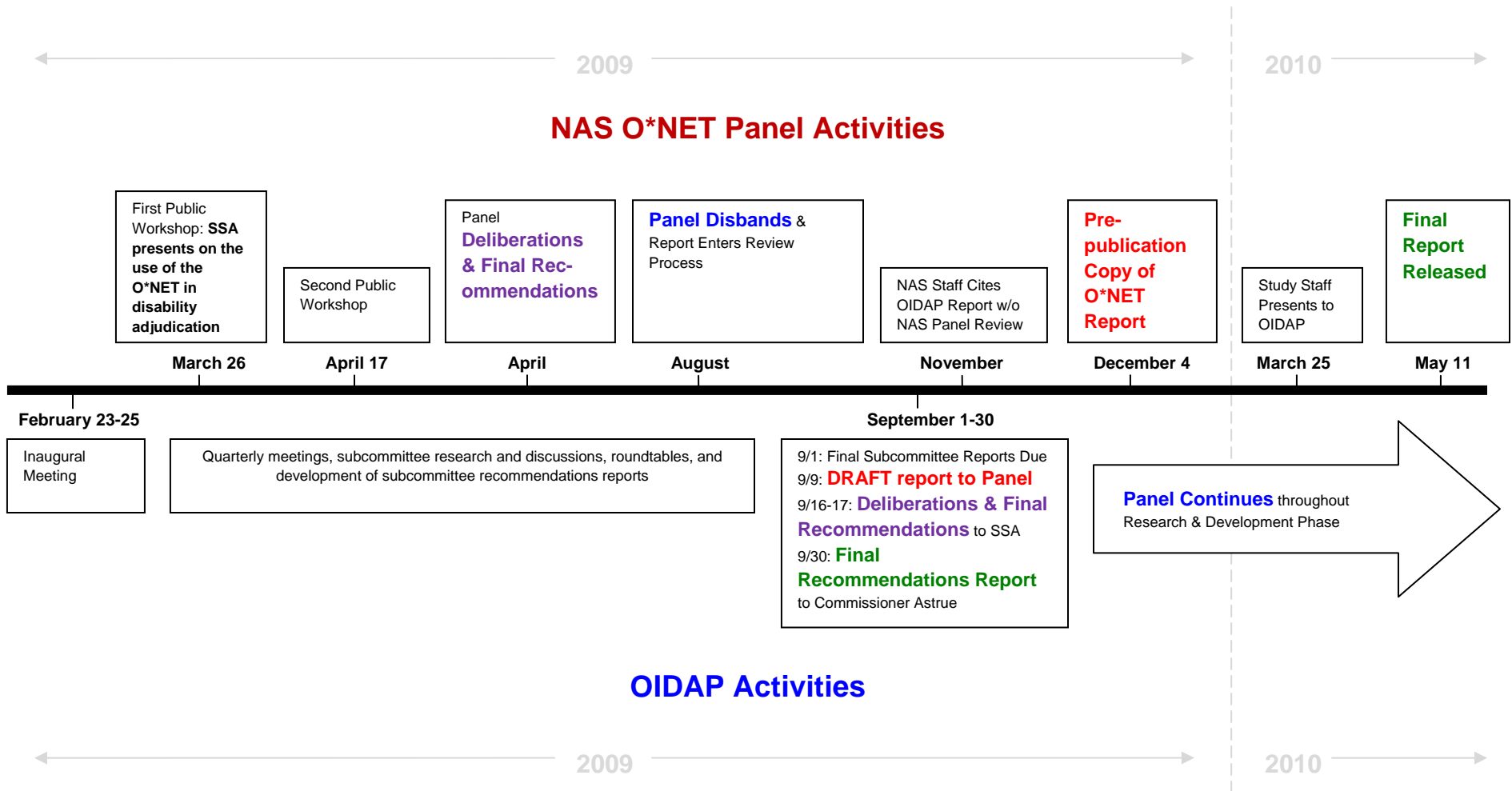## OIDAP Activities

2009 — 2010

FIGURE NOTES

NAS timeline from panel's **final recommendations** to release of pre-publication and then **final report**: 13 months (**April 2009 → May 2010**)
OIDAP timeline between subcommittee recommendations, report draft, deliberations, **final recommendations**, and **final report**: 1 month (**September 1 -30, 2009**)
- ✓ **Different processes**, different timelines
- ✓ **NAS recommendations** made **in absence of OIDAP** research and **recommendations**
- ✓ **OIDAP recommendations** complement and **refine NAS recommendations** on SSA occupational information needs and the usefulness of O*NET in disability adjudication

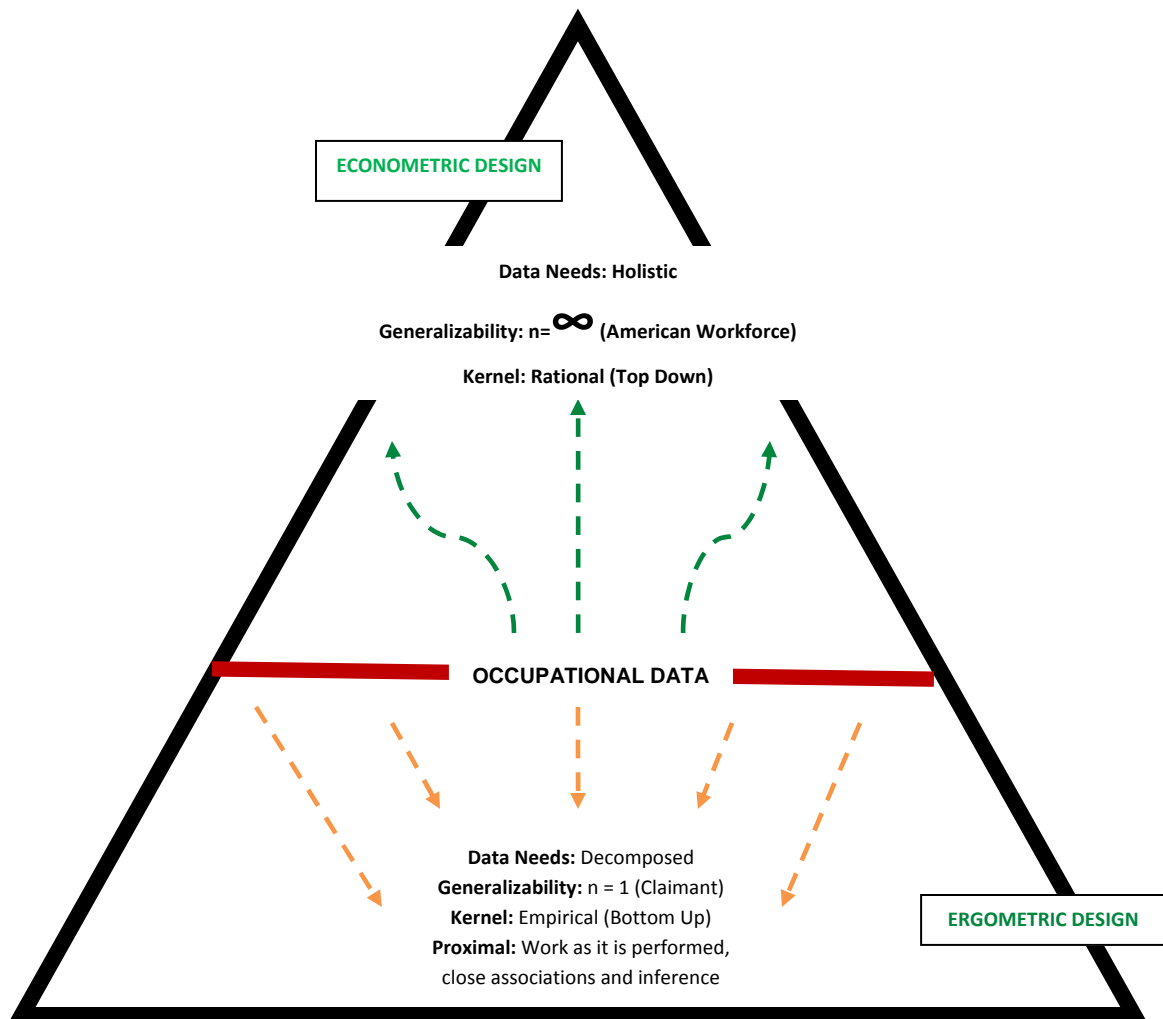# TAB D

ECONOMETRIC V. ERGOMETRIC WORK ANALYSIS DESIGNS

ECONOMETRIC DESIGN

Data Needs: Holistic

Generalizability: n=∞ (American Workforce)

Kernel: Rational (Top Down)

OCCUPATIONAL DATA

Data Needs: Decomposed
Generalizability: n = 1 (Claimant)
Kernel: Empirical (Bottom Up)
Proximal: Work as it is performed,
close associations and inference

ERGOMETRIC DESIGN

Table 1

Comparison of Ergometric and Econometric Approaches to Work Analysis

Element	Ergometric	Econometric
Definition	Measurement of work as performed by the worker	Measurement of work as a labor market category
Primary Scales of Measurement	Ordinal, Interval & Ratio	Nominal
Measurement Approach	Decomposed	Holistic
Measurement Precision	Moderate to High	Low
Unit of Analysis	Position & Job	Large Aggregations of Jobs
Primary Purpose/Application	Human Resources	Policy Development
Organizational Level	The Enterprise	The Economy
Primary Threats to Validity	Internal & SCV	External & Construct
Level of Legal Scrutiny	Moderate to High	Low
Sample Systems	Task Inventory & PAQ	O*NET & SOC
Primary Discipline	Psychology	Economics

Note. SCV = statistical conclusion validity; PAQ = position analysis questionnaire; O*NET = Occupational Network; SOC = Standard Occupational Classification

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Anyone requiring materials in alternative formats or further information regarding this document or the Occupational Information Development Advisory Panel should contact the Panel staff. Records are maintained of all Panel proceedings in accordance with the Federal Advisory Committee Act and are available for public inspection at the Panel office, by appointment.

Occupational Information Development Advisory Panel

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