

SOCIAL SECURITY ADMINISTRATION  
OCCUPATIONAL INFORMATION DEVELOPMENT  
ADVISORY PANEL INAUGURAL MEETING

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SHERATON - CRYSTAL CITY HOTEL

ARLINGTON, VIRGINIA

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

2 MS. TIDWELL-PETERS: My name is Debra  
3 Tidwell-Peters, and I'm the Designated Federal  
4 Officer for the Occupational Information Development  
5 Advisory Panel. Good morning, and welcome to the  
6 inaugural meeting.

7 Our first order of business this morning  
8 is the swearing in of the interim Chair of the  
9 Panel, Mary Barros-Bailey. I would like to  
10 introduce to you Associate Commissioner Richard  
11 Balkus of the Office of Program Development and  
12 Research. Richard.

13 MR. BALKUS: Good morning. I'm not the  
14 Commissioner. I am the fill in here.

15 Please raise your right hand and repeat  
16 after me.

17 (Whereupon, Mary Barros-Bailey was sworn  
18 in as interim Chair panel member.)

19 MS. TIDWELL-PETERS: This is one of those  
20 ad lib moments of the meeting. All of our panel  
21 members have been sworn in as special government  
22 employees. And at the beginning of the meeting, the

1 Commissioner presented plaques to them. And the  
2 plaques read, "Know ye that I do hereby appoint Mary  
3 Barros-Bailey, a member of the Occupational  
4 Information Development Advisory Panel, with my  
5 complete trust in her integrity and ability to carry  
6 out the responsibilities of the appointment in the  
7 best interest of the Agency and the United States of  
8 America. "

9 So it is official.

10 DR. BARROS-BAILEY: Good morning.

11 PANELISTS: Good morning.

12 DR. BARROS-BAILEY: Thank you for this  
13 honor. It is humbling to be here, and I appreciate  
14 this opportunity to work with all of you in this  
15 endeavor.

16 MS. TIDWELL-PETERS: I'm going to assist  
17 Mary as we walk through our meeting today.  
18 Actually, normally at this point in the meeting as  
19 DFO I would turn the meeting over to the Chair. We  
20 would like to begin by just quickly reviewing some  
21 administrative issues that you have.

22 In your packet there are operating

1 guidelines. We would like you to take a look at  
2 those. The Panel will vote on those in the future.  
3 It is a draft plan for how the Panel will do it's  
4 business. It also talks about the duties and  
5 responsibilities of the panel members. It is  
6 located in your binder behind tab three.

7           Also, has everyone had an opportunity to  
8 complete their time keeping form?

9           And Mary, we will work with your form.

10           Everyone who has had a chance to complete  
11 and turn in their time keeping form to Elaina, that  
12 would be good.

13           Does anyone have any questions about their  
14 travel reimbursement forms or any information that  
15 we need to complete those? That's good.

16           Another bit of housekeeping. After the  
17 meeting we will make sure that all of your binders  
18 and certificates are FedExed back to you. So if  
19 when you leave, you would just simply close your  
20 binder, and click your name tag on it, we will make  
21 sure they get back to your offices. And your framed  
22 certificates should follow in a few days.

1           The first piece of business that we would  
2 like to do is to review the list of action items  
3 accumulated by the staff over the last two days. I  
4 will ask you, as we go through, if there are any  
5 items, issues that we have not picked up, if you  
6 could remind us as best you can. This would not be  
7 the last opportunity for you to do so.

8           If something comes to you after the  
9 meeting, you leave, and you go, oh, you meant to  
10 talk about that and I needed to get that  
11 information, feel free to e-mail that to me.

12           Okay. We have organized these by  
13 presentation. And the first that I have on my list  
14 is a presentation that was given on day one by Tom  
15 Johns as he walked us through the sequential  
16 evaluation process. And some of the action items  
17 that we accumulated were -- there was a question  
18 about what DOT titles are most reflected among  
19 claimants? We're going to go back and look at that.  
20 And staff will go back to our offices, gather this  
21 information, and we will make sure that it's sent  
22 out to all of the members.

1           Again, this is Tom Johns presentation. Do  
2 we have any DDS data specifying what we need in  
3 the -- the OIS work group? Do we have any DDS data  
4 about specifying what we need -- I think that's  
5 "from" the OIS work group.

6           Next question was, what was the wish list  
7 of the DDS? Has the DDS given us information back  
8 as to what exactly they need?

9           We also had a question about the ADA. The  
10 extra -- how extra tasks under the ADA receive  
11 consideration from the current DOT. I believe that  
12 was a question from Bob.

13           We had a question and an action item from  
14 Judge Hatfield's presentation. Has any  
15 consideration been given to the VE pay scales? We  
16 will take a look at that.

17           Judge Lowe. Has any data been collected  
18 in grading the past work experience of the claimant?  
19 Also, are there any -- is there any occupational  
20 information needs that are unique.

21           What is relevant from O\*Net? This is a  
22 question generated during Sylvia's presentation

1 about the relevancy of any information from O\*Net  
2 and the DOT as it applies to developing a system  
3 specific for SSA's disability programs. How many  
4 occupations would be updated?

5           Also, we had a question about short-term  
6 project. Did the contractor look at the DOT in its  
7 entirety? Are all the variables being updated?  
8 What were the drivers for the update? I believe we  
9 had a partial reply, Lynnae, to your question about  
10 what was driving the contractor to perform that  
11 activity to begin with.

12           We had another question from Sylvia's  
13 presentation about the different types of job  
14 analysis. Shanan had asked if we could have an  
15 overview of the different types of job analysis to  
16 take a look at.

17           There were also questions related to the  
18 training that SSA provided to the DDS examiners. We  
19 will also go out and get you some information about  
20 the single decision maker pilot that's going on in  
21 some states. We had questions, one to go -- from  
22 Nancy about if the DOT were not obsolete, what are



1 other problems that are noted with its use?

2           Also, there was a question about sharing  
3 of best practices. Is there a process in place to  
4 communicate problems found in the DOT or to share  
5 possible best practices among different offices?

6           We also talked about the average case load  
7 of disability examiners. And we're going to get  
8 some more specific information for you on that  
9 issue.

10           There was also a request to find out  
11 specifically what SSA's needs are, and we are  
12 constantly going to be defining that.

13           There was also a question about how SSA  
14 developed the medical RFC. There were four factors.  
15 And we will get some information on how that was  
16 done. It was actually developed in more detail, so  
17 we want to go back and get some background  
18 information for you.

19           We're going to have a summary of the  
20 projects that are currently underway in the Office  
21 of Program Development and Research.

22           There was also a request that we continue

1 the outreach with the Department of Labor,  
2 Department of Commerce, possibly the Bureau of Labor  
3 and Statistics.

4 Also, there was a request that we reach  
5 out to vocational experts for their guidance --  
6 vocational experts.

7 And also, we had a request that went to  
8 one of our work group members for an L-Cat  
9 demonstration at one of the future meetings.

10 Sylvia, are there any other items that  
11 you.

12 MS. KARMAN: I think it was E-Cat.

13 And I don't know -- except for the one  
14 that I think I had jotted down on the list there for  
15 you with regard to how SSA develops the MRC, and how  
16 it is we came about selecting the basic work  
17 activities. There was a very organized effort on  
18 SSA's part back in the 1980's to look at how do we  
19 assess mental impairments. And there are people who  
20 have that historic background. We're going to check  
21 with them and get back to the Panel on that.

22 MR. WOODS: Just to add to the list of

1 Commerce, and Department of Labor, and BLS, Lynn had  
2 said education and vocational rehabilitation.

3 MS. TIDWELL-PETERS: Thank you. So as  
4 you see, staff is going to be busy for the next  
5 meeting preparing that information and getting that  
6 back to you.

7 We just wanted to review again, and again,  
8 and again, the commissioner's request for a  
9 recommendation for the panel. That recommendation  
10 is two-fold, and he has asked for it by September of  
11 2009. It is to have a recommendation regarding the  
12 type of occupational information that Social  
13 Security should collect. And also, to have a  
14 recommendation regarding the classification system  
15 for that occupational data. We just want to  
16 continue to keep that in the forefront of your mind  
17 as we plan and work on your agenda for future  
18 meetings.

19 Sylvia, would you like to stop at this  
20 point and have a discussion on the content model?

21 MS. KARMAN: Yes, I think we probably  
22 should do that.

1           We had provided all of you -- certainly,  
2    in your background materials you will see that we  
3    had included Social Security's, you know, legal  
4    program data requirements. So to the extent that  
5    some of the questions that we had on our request are  
6    list of action items, one of them had to do with  
7    SSA's needs.

8           In a very operational sense, we're still  
9    working on pulling specific examples of things that  
10   users are interested in. But just as an aside, so,  
11   that you all, I'm sure, were probably overwhelmed  
12   having to read a lot of the material that we  
13   provided, but we do have that as sort of a guiding  
14   criteria for what kind of things we need the  
15   occupational information system to do.

16           And with that in mind, we also produced a  
17   really short report -- or I guess just a short  
18   document that was, I think, in the -- is it behind  
19   number four?

20           MS. RUTTLEDGE: It's at the end of four.

21           MS. KARMAN: At the end of four. Thank  
22   you. I pulled mine out. It says, "What is a

1 Content Model?" I thought maybe we would just, you  
2 know -- I don't know -- Mark, you and I had  
3 discussed this just before we came into the meeting  
4 about, perhaps, just going around and asking people  
5 to just give their sense of what they think a  
6 content model might be and what -- you know, what  
7 your understanding is of it, so we can all, you  
8 know, get on to the same page with it.

9           We also -- this particular document has  
10 just a few questions that we posed just to get  
11 people thinking about what kinds of issues we might  
12 need to cover. We can begin doing that. I thought  
13 maybe -- maybe we would do that.

14           You want to start, Mark.

15           DR. WILSON: Yes. I thought -- and I  
16 mentioned this before the meeting started -- that  
17 the excellent set of briefings and background  
18 information and -- could not have asked for a better  
19 preparation for the panel members in terms of  
20 getting ready to deal with the issues.

21           But given that the first big deliverable  
22 really is recommendations about this, I thought it

1 would be important before we left today to -- since  
2 there was no formal presentation on content models,  
3 that we, at least, talk about this document so that  
4 we're all on the same page as far as, you know,  
5 well -- the term "content model" isn't a phrase that  
6 you hear a lot. We might not necessarily think the  
7 same thing when you hear that phrase. So that's why  
8 I thought it was important to look at this, and make  
9 sure that when we leave we're on the same page.

10 MR. HARDY: It is not part of our -- of  
11 our charge, but I think it will be something that --  
12 I have to at least ask. Data warehousing. Will  
13 there be any constraints or limitation on what we  
14 collect as far as the warehousing of information?  
15 I'm assuming that the Panel is working on that. No.

16 MS. KARMAN: I don't think that there is.  
17 That's a good question. I don't think we have a  
18 constraint there, but I will certainly look into  
19 that and determine whether or not there is an issue  
20 there; but I don't think so.

21 DR. BARROS-BAILEY: Did somebody maybe  
22 want to start addressing aspects of the content

1 model, what your concept is of content model,  
2 aspects of what it would include, that type of  
3 thing?

4 DR. GIBSON: I will go. That way I will  
5 get mine out and I don't have to worry about copying  
6 everybody else.

7 My conceptualization of a content model is  
8 that we're trying to delineate those characteristics  
9 of occupations -- I say occupations instead of jobs.  
10 I think we're going to be on somewhat of an  
11 occupational level -- but if we're still a little  
12 nebulous on where that is going to be -- but those  
13 characteristics of occupations which need to be  
14 identified in order for us to make disability  
15 determinations.

16 And those characteristics, from what we  
17 learned thus far, need to be on the two sides of the  
18 coin, as Sylvia described them. On one hand, there  
19 are those characteristics of the jobs which are  
20 physical in nature. And then on the other side,  
21 those are some characteristics of the job which are  
22 mental and cognitive in nature.

1           The degree of abstraction with which we  
2 will describe these characteristics still is kind of  
3 fuzzy to me. However, drawing from what I know  
4 about job analysis methodologies out there, I'm  
5 thinking we probably are going to be at what would  
6 be known as a worker-oriented level of analysis most  
7 likely. Not necessarily at the very micro task  
8 level, but certainly not at the more holistic level,  
9 which is utilized by the O\*Net. Somewhere in there,  
10 so that we can identify a common framework, which  
11 will allow us to compare jobs across the spectrum.

12           For example, when we identify  
13 characteristics of the work, such as necessity of  
14 communicating with others on a regular basis, we can  
15 then, if we desire, group jobs across multiple  
16 occupational titles according to that common  
17 characteristic. So my thoughts.

18           DR. BARROS-BAILEY: Does anybody want to  
19 add to that?

20           DR. WILSON: I think if you look at figure  
21 one, to kind of follow-up on what Shanana was saying,  
22 in terms of the level of analysis issue, it's a nice



1 illustration, especially on the job side, the  
2 different levels of detail that are commonly looked  
3 at and what organizational themes are, especially in  
4 terms of the DOT data people framework of getting  
5 down to the very minute level of detail at the  
6 bottom, all the way up to the sort of three molar  
7 descriptors of data people think.

8           So the idea is a job side content model  
9 would be some mixture of these kind of variables  
10 that we would specify for purposes of disability  
11 determination.

12           Now, one of the interesting omissions on  
13 the person side is you see, much like Social  
14 Security, a fairly well laid-out description of  
15 different levels of analysis of the -- within the  
16 physical domain, but much like the challenge we have  
17 been discussing over the last few days -- and it may  
18 just literally be an omission -- but I think there  
19 is considerably less detail in terms of exactly what  
20 intermediate levels of mental cognitive variables  
21 might be.

22           Unfortunately, David isn't here today, but

1 it would have been great to hear his views as to,  
2 you know, what those levels of analysis might be in  
3 some of those framework; but I think that's one of  
4 the task that we're going to have to deal with as a  
5 group is on the person side, at least those of us  
6 who are charged with psychological expertise, is to  
7 sort of flush out what that sort of taxonomic  
8 structure would be in terms of cognitive activity,  
9 perceptual activity, and then -- my own view on the  
10 interpersonal temperaments is that that is already  
11 flushed out. I'm not too concerned about being able  
12 to go out and find some taxonomic structures there  
13 that we can use.

14 MR. WOODS: Consistent with the way this  
15 is broken out, I guess I could suggest one way maybe  
16 complimenting this view, which I think is coming  
17 from a pragmatic -- or at least in my mind -- a  
18 pragmatic standpoint. And I see it's a set of  
19 information, which I think really crosses the person  
20 and the job side that relates specifically to those  
21 components of our assessment or adjudication system  
22 that matches the exertional, nonexertional, and

1 medical capacity. That we have to make sure that  
2 we're looking at from the occupation side that those  
3 particular elements are captured, and that they can  
4 be matched up directly against those kind of  
5 assessments.

6           And then there is a subset of information  
7 on the job side that may relate more to the step  
8 five of the process, and that's looking at the  
9 transferable skills. And those skills -- I think  
10 that's reflected in these; but a way of coming at  
11 it -- because that actually can be used to look at  
12 them as other occupational opportunities.

13           So it's a way of just how we can cut  
14 across the information that's collected in the  
15 content model; but I think it's important, because  
16 that may get down to a very pragmatic level.

17           DR. BARROS-BAILEY: And I'm not sure where  
18 it's assumed within this, but also the sensory  
19 aspect. I don't know if that's assumed within the  
20 physical and also environmental in terms of  
21 contextual, because those also, I think, become  
22 important.

1 DR. WILSON: I couldn't agree more on both  
2 of those issues.

3 The other thing that is not in this  
4 model -- in this figure, I mean, is the sort of  
5 contextual setting variables that, I think, may  
6 matter a lot in terms of the kind of considerations  
7 we have. And psychologist tend to sort of break  
8 out -- when we talk about cognitive, we're talking  
9 about cognition, things of that sort. I think here  
10 the term has been used a little broader. Physical,  
11 cognitive, and then perceptual, which is kind of an  
12 integration of physical and cognitive abilities, you  
13 know, for perception purposes.

14 I think that's sort of subsumed. Like if  
15 you see here under physical, the second level of  
16 analysis, they have got visual; but, you know.

17 MS. KARMAN: It was actually intended as  
18 just an example to show people the levels, the kinds  
19 of boxes we're trying to fill in. Because  
20 certainly, everything I am hearing here is correct.

21 Jim mentioned skills. You know, we not  
22 only need to know the skill sets. In my mind I'm

1 thinking it is almost like possibly -- in some cases  
2 could even be the task. So I'm not sure about that.  
3 Then, skill level, like complexity level of the job,  
4 which again, that, to me, gets tied up with  
5 cognition some time, you know. And I notice that we  
6 have interpersonal/temperament. We don't need  
7 temperament.

8 DR. WILSON: Right.

9 MS. KARMAN: That's what typically you  
10 tend to see at that level, so we included that as a  
11 way of showing what we were talking about what  
12 different levels we meant. We did not intend, for  
13 example, for the Panel to have to get down to the  
14 very bottom level where you are looking at how would  
15 you measure it. So that's why that's there. But  
16 absolutely you are right.

17 And like work setting, like the context.  
18 We definitely need to know work settings and things  
19 like that. So there is plenty.

20 MS. LECHNER: As I hear people talking, I  
21 think that the -- the information we need to capture  
22 can be sort of broken down into about six broad

1 categories. One being the physical demands; the  
2 cognitive demands being another one; behavioral  
3 demands; environmental demands, which are the, you  
4 know, things like the exposure to the elements; the  
5 perceptual issues, and then the skills.

6           And then I think, although, we may not be  
7 making a recommendation -- it sounded like from what  
8 you said, Sylvia, just then, you don't want us  
9 making recommendations about a particular  
10 measurement system. I think that we have to be kind  
11 of cognizant about how these things can be rated.

12           MS. KARMAN: Absolutely. I wasn't  
13 meaning -- first of all, we aren't trying to put  
14 constraints on the Panel in that regard, in any  
15 case. Certainly, we need to be thinking about  
16 measurement, because there is really no point in  
17 including categories -- for want of a better word,  
18 categories of elements that we would be possibly  
19 interested in, and come to find out the measurement  
20 is just, you know, haphazard or, you know,  
21 guesstimate at best.

22           So absolutely, how one would be able to

1 measure -- could we measure? How observable are  
2 these elements? If they are not observable, what  
3 other ways can we get a testing to get at that?  
4 Those things are absolutely critical.

5 I guess what we were trying -- I guess  
6 what our team was trying to express here to the  
7 Panel was we didn't expect in the Panel's  
8 deliberations with regard to content model, that you  
9 would also at the same time be needing to develop  
10 the instrument. Which is almost where you would end  
11 up going if you went to that level. So that's all  
12 we were trying to convey.

13 MS. LECHNER: Thanks for the  
14 clarification.

15 DR. BARROS-BAILEY: So as we head to the  
16 task of coming up with a content model in September,  
17 what additional information do we need as we kind of  
18 have this discussion for this daunting task?

19 DR. FRASER: One point, which is really  
20 the DOT doesn't consider specifically, but that is a  
21 kind of educational requirement or certification.  
22 You know, for example, you could be a phlebotomist

1 physically, motor dexterity, et cetera; but if I  
2 talk to people who hire phlebotomist, unless you  
3 have the certification, you have gone through the  
4 three or four week training program, or you have  
5 certain college classes, science oriented, you are  
6 out, okay.

7           There are more and more jobs in our  
8 society that require, you know, a certification or  
9 even brief education in some cases, medical coding,  
10 and so forth. That's not considered in the  
11 information we have had so forth, the DOT, et  
12 cetera. There is more and more requirements  
13 relative to certification, particularly the medical  
14 field.

15           DR. WILSON: Robert makes an excellent  
16 point. If you look at what is current -- the SVP is  
17 relied on considerably. And I think that's one area  
18 that we would like to at least think about and  
19 explore more. Is that adequate? How would the  
20 scale need to be refined so that it would get at  
21 these kinds of issues? Anticipate changes in terms  
22 of certificates, especially in the technology area.



1 I mean, this stuff comes out all the time; there are  
2 constant generations of new programs that people  
3 have to deal with. So examining the SVP, I think,  
4 addresses Robert's point, and something I was  
5 thinking about as Sylvia was talking.

6 MR. WOODS: I think the SVP is, actually,  
7 one of the critical items that we need to look at.  
8 Would add to that, that we also look at in the  
9 context of what other organizations are doing. May  
10 not be what we ultimately need, but, for example,  
11 the Bureau of Labor Statistics has an 11 category  
12 classification system for what they do; and that has  
13 five, which is actually based on the BLS, and there  
14 may be others. Just contextually, we want to look  
15 at that, because if they relate to how we can link  
16 down the road to other information.

17 MS. KARMAN: Thank you. SVP has been a  
18 big -- we have been discussing this, you know, for  
19 many moons, what to do with SVP, because we have  
20 been using that as a proxy for skill level.  
21 Clearly, skill level is going to be important to us.  
22 We have to discuss, first of all, whether we really

1 believe there is anything such as unskilled anyways,  
2 you know -- a really relevant way of reflecting  
3 work. Just to get at the issues of certifications  
4 and things.

5           Social Security right now and the way we  
6 define -- you know, we examine the extent to which  
7 someone is capable of doing other work. We don't  
8 look at their certifications and things. However,  
9 what I was hearing in the comments that the three of  
10 you made, Robert, and Mark, and Jim, is that you all  
11 took that to this place of how do we assess the  
12 complexity level of the work? Which does, in  
13 fact -- it is something that is critical for us.

14           DR. WILSON: For me the issue is -- I  
15 think if I considered all possibilities, and then  
16 provide SSA with different alternatives; but one  
17 option would be to say, well, do we really need an  
18 aggregate rating, you know. Or is this sort of  
19 requirements, is that something that can be  
20 calculated from a series of skill assessment areas,  
21 or something like that.

22           MS. LECHNER: In response to your

1 question, Mary, about what additional information  
2 that we need. This came up -- I think has come up  
3 repeatedly over the past couple of days. That we  
4 want to hear, I think, in greater detail from the  
5 DDSs with regard to their perceptions of the needs  
6 and for detail about their process. I mean, I think  
7 all of us are pretty clear on the five step process  
8 overview that presenters have done a fabulous job in  
9 clarifying that for us.

10 I think that some of what is needed --  
11 some of the changes that are needed, sort of the  
12 devil is in the detail to an extent of learning more  
13 about how those decisions are currently made, and  
14 what pieces of data -- what the wish list is.

15 DR. GIBSON: To build on what Deborah  
16 said, I keep coming back to a fundamental question,  
17 which is, are we allowing the current RFCs to drive  
18 our content model, or can the content models change  
19 the current RFCs? Because I think that is an  
20 underlying thing -- sometimes I think I am hearing,  
21 no, we can change the RFC. Then other times I'm  
22 hearing, no, we need to stick with the RFC, because

1 that's what the disability service center is already  
2 used to. So I still want some clarification on, are  
3 the RFCs driving the content model, or is the  
4 content model -- hopefully, they are not driving the  
5 RFC process.

6 MS. KARMAN: I would think that given that  
7 we are taking a look at this to develop a system  
8 that's useful for -- tailored to disability  
9 evaluation, we should be looking for the content  
10 model that we recommend, and that SSA finally uses  
11 those recommendations to decide what to do to drive  
12 the development of the RFC.

13 Now, having said that, though, and  
14 probably the reason why -- it's possible that maybe  
15 the reason you are hearing the message otherwise is  
16 because we do have the limitations of real world in  
17 terms of what can you honestly get or expect to  
18 receive from a claimant, or can we know about the  
19 claimant? What medical evidence can we obtain?  
20 What functional evidence or other evidence can we  
21 get?

22 And so therein lies that conundrum of

1 well, you know, there is that. There is only so  
2 much you can obtain anyway, so that is probably why.  
3 I would think that the content model, that's where  
4 we would start; then, you back into the other  
5 things. Because those are the two instruments we  
6 would be developing as a result of the content  
7 model, would be the job analysis one, and then the  
8 person side one.

9 DR. BARROS-BAILEY: So back to the -- go  
10 ahead, Deborah.

11 MS. LECHNER: I was going to build a  
12 little bit on what, I think, Sylvia was eluding to;  
13 and that is, as we think about this content model  
14 and the kinds of things that we want to be able to  
15 capture the kinds of the data, you know; I think we  
16 have to be really aware of the evaluation systems  
17 that are out there.

18 If we say we're going to measure  
19 cognition, you know, what tools are out there that  
20 allow us to do that? And so that our rating system  
21 is somewhat guided by the tools that are out there.

22 DR. BARROS-BAILEY: Go ahead Tom.

1                   MR. HARDY: As we're talking, it seems  
2 like we're paying a good amount of attention to the  
3 person side, but I want to step back and look at the  
4 job side for a second too, because, as you said,  
5 they have to balance. I am wondering if there is  
6 any sense at this point in talking about looking at  
7 a task description, a material duty description?

8                   How are we looking at -- you know, when we  
9 start to classify in the aggregate, what kind of  
10 system are we going to want to look at for gathering  
11 that information, which is also going to drive  
12 content on the job site as well? I don't know that  
13 we have gotten to that point either. Maybe we have.  
14 I haven't heard it.

15                  DR. BARROS-BAILEY: I haven't been here  
16 for the last two days, so I can't answer that  
17 question.

18                  DR. GIBSON: I was just going to say, I  
19 think some of that goes back to what Mark said a  
20 moment ago about determining the unit of analysis or  
21 the unit of measurement. That I was trying to get  
22 at as well, because there is so many different

1 levels we can measure the job side data at, we're  
2 going to have to decide what is useful for  
3 disability services. I think that in some way will  
4 drive that level question too.

5 DR. WILSON: Well, I think it's an  
6 important question. And the requirement to be able  
7 to show what other kinds of jobs are out there in  
8 the economy might be relevant to someone with  
9 whatever reserve capabilities that they have. I  
10 don't know if it would be task level, but as Shanana  
11 was saying, it's going to be -- it's going to have  
12 to be at enough level of detail that Social Security  
13 Administration can make the judgment that this  
14 either is something that someone is capable of doing  
15 or not.

16 From my standpoint, I think the  
17 implication of that is we're looking at Social  
18 Security Administration having an occupational  
19 analysis unit, and having people that go out and  
20 study work at a particular level of detail, or  
21 contracting that work out to people. My own view is  
22 I would rather see them, because of the nature of

1 this task, take that on themselves. I wouldn't want  
2 to farm this out.

3 But my view is that there is no way around  
4 a fairly significant occupational analysis effort,  
5 hence, the concern for where are the jobs that you  
6 see most? What are the jobs -- maybe this is sort  
7 of a variant on that action item. What are the jobs  
8 that you refer people to most. I mean, that would  
9 be, obviously, the place we would want to start in  
10 terms of having this new level of detail.

11 I just don't see anyway around, you know,  
12 significant occupational analysis efforts. And from  
13 a defensibility standpoint, if you look at the role  
14 that DOT has played, and it has been challenged, if  
15 there is not the same level of effort or better with  
16 improved methodology concern about professional  
17 practice in terms of how this information is  
18 collected, it's not going to stand up to scrutiny in  
19 the court.

20 And as an analyst, you know,  
21 unfortunately, used the term "daunting" and everyone  
22 picked that up yesterday. That's really what I was



1 thinking about -- I wanted to make that clear -- is  
2 the sort of having done analyses, the amount of  
3 effort here when you talk about the entire economy  
4 is daunting. If anyone can do it, I think it's this  
5 organization, because they're legislatively charged  
6 with doing it. They have to -- as I understand this  
7 now, this is part of their mandate. They can't not  
8 do this.

9                   And then the question becomes, if you  
10 can't not do this -- and you have to do it right.  
11 And if you have to do it right, the level of effort,  
12 and the level of detail you need to make these  
13 judgments is significant.

14                   DR. BARROS-BAILEY: Go ahead, Jim.

15                   MR. WOODS: I think Mark's point -- I  
16 realize that that's a down the road implementation  
17 issue that is very important. Having, however  
18 that's developed, expertise within Social Security  
19 to do that. Secondly, I believe there will always  
20 be a need to have people who understand and can go  
21 to other information sources.

22                   I will just lay it out on the table.

1 Social Security Administration will never be  
2 developing occupational employment estimates, and  
3 projections. It ain't going to happen. It is not  
4 going to happen for a number of reasons that we  
5 don't have to discuss here. Those data are going to  
6 be developed by the Bureau of Labor Statistics,  
7 obviously, the Commerce as well; but primarily  
8 Bureau of Labor Statistics. And recognizing how  
9 that information can be used -- because it is never  
10 going to match up one to one, what we have. So  
11 building that expertise, I think, is going to be  
12 really critical.

13 A second point I want to add -- and this  
14 is just maybe for future meetings -- looking at the  
15 whole transferability issue in the context of Social  
16 Security where you have other criteria. I think we  
17 want to take advantage of, at least, if not having  
18 presentations, but looking at currently how some of  
19 the systems that are out there -- many are O\*Net  
20 based, but that is not really the issue. There are  
21 systems that are out there that are designed to work  
22 with adults as well as youth, the career information

1 delivery systems. Some of which are really focused  
2 on and tailored for transferability of skills.

3 I'm using skills very broad knowledge, you  
4 know, aptitude, skills, tasks. So that as part of  
5 our learning process let's take a look at that,  
6 because there is a lot of work that has been done in  
7 that area that we might benefit from, not replicate  
8 necessarily; but then will help inform the process,  
9 because it's not something new. A number of these  
10 systems are actually quite good, and would be  
11 helpful to us to learn about.

12 I had not been thinking at all in terms of  
13 what Mark had said. The more I heard here and  
14 having Mark articulated with a little better  
15 enthusiasm and excitement, the voice was raising --

16 DR. WILSON: There has been no table  
17 pounding. I had to get some in there.

18 MR. WOODS: I think that -- I just relate  
19 back. I come from a background of DOT and the  
20 O\*Net, happen to think -- and Dr. Harvey, and  
21 Shanan, and Mark and folks have a lot of criticisms,  
22 a lot of things we have done on O\*Net. I think

1 what's important is here is this has to be Social  
2 Security's baby.

3           When we talk in Department of Labor about  
4 how O\*Net is being used in all the career  
5 information systems and is affecting millions of  
6 people. Yes, it's affecting people potentially in  
7 helping them think about decisions maybe in  
8 transferability of skills. You are talking about  
9 billions of dollar going out to assist people that  
10 have needs, but also have implications on budgetary  
11 issues and things on the national level. You know,  
12 talking about a direct application of information.

13           And now that I think about it, the idea  
14 that Social Security does not have some direct  
15 expertise and control over information that actually  
16 feeds that system depends entirely on other sources.  
17 Probably now in this day and age, doesn't make a  
18 whole heck of a lot of sense.

19           MS. RUTTLEDGE: This is Lynnae. You know,  
20 as I'm listening to everyone, what really strikes me  
21 is that, number one, this is not rocket science. I  
22 want people to just kind of step back for a second

1 and think about what we're really talking about is  
2 blending of models that started with a very  
3 medically oriented model from the very beginning to  
4 a model on the very far other side, which is the  
5 Department of Labor side of only looking at careers  
6 and jobs, and trying to figure out so how do you  
7 move from a very medically-oriented system of  
8 looking at the person's disability to what it is  
9 vocationally is going to make sense. Right in  
10 between all of that is the vocational  
11 rehabilitation.

12 I think if we continue to think about this  
13 in a way of how do we draw from the expertise that  
14 we all bring to the table, and work from a  
15 perspective that says, yes, we are working within  
16 the constraints of a Social Security system that is  
17 based on the diagnosis of disability and the  
18 identification of disability as the reason a person  
19 is here.

20 But if we then say, what do we need to  
21 know about that person's medical condition, whether  
22 it is a physical or mental disability to allow them

1 to maximize their potential? And then fit that into  
2 what the world of work is going to be not only  
3 today, but tomorrow, I think we're going to be able  
4 to get there.

5           So I would just like people to just kind  
6 of step back for a second, though. You know, I do  
7 understand the complexity of this. I do clearly  
8 recognize the constraints that we are going to work  
9 within. But I also know that around this table and  
10 in our fields we have people that do that cross walk  
11 every single day. That has to look at someone's  
12 medical diagnosis, and then identify what kinds of  
13 job opportunities are going to be available to them.  
14 And then how do you assure that that person is,  
15 then, going to be able to get that kind of job?

16           I just -- I like the conversation that's  
17 going on, because I think all of that is going to  
18 have to be included in our content model. I mean,  
19 we're going to have to figure these pieces out. I  
20 couldn't resist. It was just a great opportunity to  
21 remind us of that.

22           MS. LECHNER: Kind of building on what

1 Lynnae is saying, you know, we -- what I see  
2 happening as part of the process is that the  
3 adjudicators have to take medical information and  
4 make inferences about function in the current  
5 process. So the question that I have for Sylvia and  
6 the group is, to what extent will we be able -- or  
7 will the DDSs of the future be able to actually  
8 directly measure function? Will they be able to  
9 administer cognitive tests, instead of making  
10 inferences from medical records? Will they be able  
11 to administer physical functional tests? So those  
12 are some of the questions that I have in terms of  
13 how the person will be evaluated.

14 MS. KARMAN: I don't have a direct answer  
15 for this. You are right, we do have to take medical  
16 evidence and make inferences from that evidence with  
17 regard to a person's function. And we have been  
18 cognizant of the fact that to the extent that we are  
19 going to be gathering -- hopefully gathering  
20 information about what is required in the world of  
21 work, that in some cases we don't have right now,  
22 that would, in turn, inform us about what it is we

1 need to do in terms of getting information about the  
2 claimant. So that is a big issue for us.

3           Obviously, while there may be some things  
4 in the world of work that may be ideal to go and  
5 get, if Social Security is completely unable to, you  
6 know -- if anybody is unable to, I mean, regardless  
7 of whether it's Social Security or not -- if it is  
8 not feasible, certainly, from an operational  
9 standpoint, much less even is this the kind of  
10 information that is available, if it's reliable to  
11 get about the claimant, maybe that's an item we have  
12 to drop.

13           So I mean, I know we have been struggling  
14 with that, you know, where do we start with that?  
15 So I'm not sure. That's an open question. It is  
16 something we're aware of we're going to be working  
17 with you all about that.

18           DR. WILSON: Well, I think one of the  
19 reasons it is not rocket science is the researchers  
20 sort of lag behind, and development hasn't taken  
21 place. I think clinical judgment has sort of  
22 stepped into that void. And those of us who have



1 looked at comparisons of different kinds of models  
2 and how they operate, clinical judgment among the  
3 best clinicians works great. But if you look at  
4 those over time, and if you expand them on the scale  
5 we are talking about Social Security having to deal  
6 with, they're oftentimes expensive, highly variable.

7           And so to me, the rocket science parts of  
8 this comes into for Social Security down the road,  
9 as we build these models and start populating them,  
10 is looking at quantitative measures to estimate and  
11 remove some of the variance from the system. Create  
12 greater consistency, model those efforts to the best  
13 clinicians so that the agency makes more consistent,  
14 fair, you know, those kinds of issues. So the sort  
15 of synthetic validation. That's where we get into  
16 the rocket science part.

17           I think you are absolutely correct in  
18 terms of what I would like to see us do as not only  
19 identify the model, but try and operationalize some  
20 components of this as quickly as we can to help them  
21 out right now. Because there has been so little  
22 development, and we're so far behind on the

1 occupational analysis end of things in terms of  
2 where the -- you know, if I was going to pick one  
3 area, I would say -- like -- well, my corporate  
4 clients is all about quick wins, you know. What can  
5 we do now that's going to impress the chairman  
6 before the end of the quarter? And that, to me,  
7 would seem like one of the -- where I think we could  
8 move ahead relatively quickly on the job side to  
9 give the Social Security Administration some updated  
10 information relatively quickly.

11 MR. HARDY: I'm sure I'm not the first to  
12 say it's the chicken and the egg thing here. That  
13 is my flash from above of the day. But as a  
14 vocational counselor and attorney, I always keep in  
15 my mind, you know, at some point the rubber meets  
16 the road, and it's got to be defensible, and we have  
17 got a September deadline. And that really weighs in  
18 my head a great deal.

19 And I'm wondering what we as a Panel can  
20 do between now and our next meeting really to start  
21 looking at this. I know the workgroup is doing  
22 things and we're going to be hearing things. Is

1 there an expectation of us as panel members, what  
2 can we do, where can we start, how are we going to  
3 start divvying up some work? Again, as a vocational  
4 counselor, I want to say, okay, let's get out there  
5 and say see how we're going to start measuring jobs.

6 DR. BARROS-BAILEY: One of the things I  
7 wanted to add in terms of the way I see the  
8 conceptual model, I think it is the setting of  
9 standards in a variety of different notes, be it  
10 physical, cognitive or what not. We know some  
11 things in some of those notes more than others. The  
12 research is out there.

13 It's how do they interact together within  
14 function? We're talking about function between the  
15 person and how they function in the job and how do  
16 you measure that function from a variety of  
17 different ways?

18 So for me, one of the things -- additional  
19 information I would like to know is some of the  
20 research within those notes. Be they physical,  
21 what's going on within the cognitive, some of the  
22 areas that we have identified.

1           So if we could understand the standards  
2 within even of those areas and what's happening in  
3 terms of the research, the person job fit in terms  
4 of how that is measured from a functional  
5 standpoint, then, we can understand maybe -- some of  
6 them could move ahead a little faster than others in  
7 terms of the physical versus the cognitive. But it  
8 all kind of fits together in terms of a general  
9 standard. And then who can measure that standard  
10 becomes something else.

11           You know, is it something within SSA, or  
12 can people who are -- throughout the economy who are  
13 specialists in doing job analyses also be able to  
14 contribute to that effort? So it's kind of a  
15 decentralized collection of data. So one of them is  
16 coming up with a standard. The other one is  
17 populating that standard, making it focus on  
18 function.

19           DR. WILSON: Right. I mean, there is  
20 really three issues here. One, there is this model  
21 which encompasses the occupational information and  
22 the character of the people doing the work. Then

1 what you are pointing out is -- and Sylvia said this  
2 several times -- the linkage or the bridge between  
3 these two. So we need a better, more detailed, more  
4 focused model that takes into consideration Social  
5 Security Administration's needs for each one of  
6 these domains.

7           But then we also need to establish how are  
8 we -- what's the linkage procedure? How do we --  
9 you know, if "A" over here, then what's "D" over  
10 here? So it's really what are these models and then  
11 how do we go about -- and level of standards and  
12 function within each area. But then also, by what  
13 means do we link these two areas together? You  
14 know, is it as simple as an SVP, if you are over  
15 here, then, that means? Or is it something more  
16 involved?

17           DR. FRASER: It would seem that we need to  
18 have some agreement on the level of discreteness in  
19 terms of job analysis. And then kind of what  
20 approach.

21           You know, certainly -- are we going to  
22 stop at a function level or at a task level? For

1 some jobs it is easy to do the task level. There  
2 are only a few tasks that are done; they are done  
3 frequently, you know, end of story.

4 More complex jobs, you know, there might  
5 be 15 major functions; and under each function, you  
6 know, 16 tasks. You know, whether it's function or  
7 task, it is going to be how critical is that to  
8 efficiency on the job? And then, how much time is  
9 spent in the function or task?

10 I don't know with the DOT when they list  
11 the tasks that are done, what kind of template was  
12 used in deciding, you know, these are the tasks, and  
13 then the person may also do these. Those would be  
14 almost the nonessential functions or tasks, but  
15 could be done.

16 I think -- you know, because the job  
17 criteria all emanate from our analysis approach and  
18 discreteness of that. And to make progress, we  
19 would have to have some kind of consensus thinking,  
20 I think, in terms of that approach.

21 DR. BARROS-BAILEY: Any other thoughts in  
22 terms of information we need to know to move forward

1 with this task?

2 MS. LECHNER: Well, in response to what  
3 Bob said, I think that we have got to recognize that  
4 the DOT -- the current DOT and the tasks that were  
5 defined happened before ADA. So there was no  
6 delineation between essential and nonessential  
7 tasks. They were just tasks that were established.  
8 And the Department of Labor's handbook for analyzing  
9 jobs does sort of spell out what -- how do you  
10 decide whether something is a task and whether it's  
11 part of another task? That part of it is very  
12 subjective, I think.

13 So you know, there is some issues related  
14 to task delineation that I think, as we move into  
15 doing something we will have to consider essential  
16 and nonessential to some extent. Then, you know,  
17 what are the cognitive, physical, behavioral demands  
18 that are required to execute those tasks? I think  
19 that's where -- that's the level we're currently --  
20 at least in the physical realm we are measuring the  
21 person's ability to do the physical demands, not  
22 specific job tasks. And you know -- so that's where

1 the match up.

2 We look at here are the physical demands  
3 of the job. Here are the physical abilities of the  
4 patient to perform those demands. So we have to  
5 decide what we want to do about this whole task  
6 versus demand issue.

7 DR. GIBSON: Can we take a round robin,  
8 just see what people are thinking to get at that  
9 question of trying to identify some level. I am  
10 sitting here looking at the figure one model and  
11 acknowledging that -- on the job side -- this,  
12 obviously, isn't meant to be a comprehensive listing  
13 of every potential thing that could fall in here.

14 I am just curious what level people are  
15 thinking is most likely to be the level of analysis  
16 that might work. And then, if Sylvia can give us  
17 some information and feedback on if she thinks that  
18 might be an appropriate level for SSA's need.

19 People afraid or not sure where they would  
20 like to come in on that question? I figure it might  
21 be a place to start, though.

22 DR. BARROS-BAILEY: Any thoughts?



1                   Did you have any as you were thinking  
2 through.

3                   DR. GIBSON: All right. I will go. I am  
4 sitting here with little arrows drawn on where I  
5 think it should be. That's just my philosophy at  
6 this point. However, looking at the job side level,  
7 I am thinking the level of analysis probably  
8 somewhere around that second from the bottom. It  
9 could be the second from the bottom or the third  
10 from the bottom, but somewhere in that general  
11 vicinity is what I think is most --

12                   Obviously, we are not looking at whether  
13 or not job uses weapons; but at that level of  
14 analysis, I think that is where I am kind of at.

15                   DR. BARROS-BAILEY: Is that because those  
16 are the most observable at that level?

17                   DR. GIBSON: I think it's because I think  
18 they are observable, which makes them legally  
19 defensible. I also think that at that level, you  
20 are still able to crosswalk multiple jobs, which you  
21 probably can't do at the more micro level. I also  
22 think that that would be a significant reduction in

1 the number of tasks to go with that level. I think  
2 it's feasible for data collection.

3 DR. WILSON: Yes, I agree. The term "job  
4 analysis" tend to get thrown around, you know.  
5 What's a task? And what's an essential task? In  
6 terms of level of analysis issues, we may at some  
7 point -- I suspect over time we are going to develop  
8 our own language as to how we discuss things, so  
9 that we are all on the same page.

10 These sort of -- what I refer to them as,  
11 you know, generalized work behavior, generalized  
12 work activity, they're still observable. They are  
13 still at a level that you recognize the work; but it  
14 is not this bone grinding, mind numbing every last  
15 task that a person performs, which I really do think  
16 is why DOT didn't get updated. It is just so  
17 expensive and so time consuming that we don't have  
18 that. But on the other hand, we cannot move to a  
19 level of analysis where it's essentially expert  
20 judgment. These have to be observable things.

21 And in terms of the cognitive demands, I  
22 think that's going to be real challenging. How do

1 you get at these cognitive and perceptual activities  
2 going on at work, which an increasing amount of work  
3 is essentially sitting around thinking, and, you  
4 know, looking at monitors; yet, maintain that  
5 observability.

6 MR. HARDY: Using my vocational head and  
7 my lawyer head, and I keep thinking of Daubert and  
8 Frye, which comes into everything that we have to  
9 think about at some point as well, which when we  
10 originally started all of this wasn't out there ten  
11 years ago. We were just becoming aware of what  
12 those standards were going to be.

13 I'm somewhat coming down at the second  
14 level from the bottom, I think that may be the level  
15 of aggregation and measurements that we are going to  
16 have to have to meet some of those standards to get  
17 through those thresholds that at some point SSA is a  
18 going to have to meet.

19 MS. LECHNER: The other thing that strikes  
20 me, as I look at the model in figure one, to me, all  
21 of this -- you know, we have got certain things on  
22 the person side. We have got other things on the

1 job side. To me, all of it goes on the person side.  
2 All of it goes on the job side. So there is a  
3 crosswalk. Because using the taxonomy, as we see it  
4 here, there is a lot of overlap, a lot of  
5 duplication that could be called out of that, and  
6 you know, it is -- the content model has -- should  
7 utilize terminology that can be cross walked on  
8 either -- on the person side and the job side.

9 DR. BARROS-BAILEY: Go ahead.

10 MR. HARDY: And another thought I was  
11 having in a conversation with someone yesterday is,  
12 you know, we keep talking about levels of  
13 aggregation, and how far we we're going to go down,  
14 and things like that. And it was like a bullet from  
15 the blue. I was talking to someone who said the  
16 highest level of aggregation we have is sedentary.  
17 We're truly aggregating the world of work into  
18 sedentary, light, medium, and heavy. And that's  
19 probably the broadest aggregations you can think of.

20 I have never really thought of it that way  
21 before. And that got me thinking down another path,  
22 which is, if we not worried so much about data

1    warehousing, and what is it going to take to do the  
2    measurability. I'm wondering if we are really  
3    moving -- if we move into a level that's second from  
4    the bottom, or whatever we're going to call that,  
5    that we're moving away from aggregation at those  
6    levels, so we're also moving away from, in some  
7    senses, a model where tasks and material duty is  
8    tied to exertional level, is tied more to these  
9    things that we're measuring, and it is a completely  
10   differently way to organize the information.

11                    Again, we have the freedom to organize it  
12   in anyway we want without a restriction to the data  
13   collection. I would like to challenge us on that so  
14   we kind of not even look up that ladder so much  
15   anymore to those higher levels of aggregation of  
16   sedentary, light medium, and even data people  
17   things. Is that something that, you know, we might  
18   want to consider?

19                    DR. BARROS-BAILEY: So Tom, are you asking  
20   are there other conceptual models out there in terms  
21   of content models that might not fit into the rubric  
22   we have been using over time that we might want to

1 take a look at?

2 MR. HARDY: Yes. Absolutely.

3 I was explaining, again, to someone in the  
4 conversation, I can't think in language that's not  
5 DOT anymore. I can't speak in language that's not  
6 DOT anymore. And I'm challenging myself, I'm  
7 challenging everybody here to let's stop thinking in  
8 that language. If we're really looking for a  
9 content model that's going to meet the needs of SSA,  
10 that's going to meet the needs of the DDSs, that's  
11 going to meet the needs of other users -- and we  
12 have to remember that even though we're designing  
13 this specifically for SSA, there are other users;  
14 and there is also legal issues that we have to have.

15 We need to stop thinking, I think, in  
16 those huge monolithic thought patterns, at least I  
17 still admit to thinking in sedentary, light, medium.

18 DR. BARROS-BAILEY: Okay. Jim, and then  
19 Mark.

20 DR. WILSON: I couldn't agree more. I  
21 think that's an excellent point -- oh, I'm sorry.

22 MR. WOODS: I defer to the Raleigh

1 resident.

2 DR. WILSON: Oh, okay. The longer Raleigh  
3 resident. We are both carpet baggers.

4 I think that's an excellent point.  
5 Although, I would point out that one of the  
6 impressive things about the original functional job  
7 analysis model is the number of times -- when you  
8 look at high order factor analyses of whatever kind  
9 of work descriptor, it's almost eerie that those  
10 higher level dimensions tend to fall out of the data  
11 people think.

12 The point is well taken, and I absolutely  
13 agree that we shouldn't come at this from the  
14 blinders of a particular model. That we should  
15 decide on that level of analysis, and then let the  
16 data speak. Let the data tell us where we're going  
17 to go, especially given the unique application.  
18 Social Security has a framework that they want to  
19 use this for. So at least more generalized -- you  
20 know, prior research hasn't been conducted in the  
21 light of what their requirements are. So it very  
22 well could be the case that we're trying to force a

1 model on them that isn't necessarily the best.

2           Sorry, Jim.

3           MR. WOODS: I'm only a two year Raleigh  
4 resident.

5           Just a couple things. One, I guess I want  
6 to second and third what Mark has said. I think  
7 it's important to look at some of those models, and  
8 just go ahead and say it, please don't dismiss the  
9 notion of maybe talking to some of the folks down in  
10 North Carolina in Department of Labor that have  
11 worked on the O\*Net system. Again, not with the  
12 idea that anything in O\*Net will fit Social  
13 Security's needs; but there is a lot of research and  
14 work that's been done in looking at content models  
15 that I think we can learn from.

16           Secondly -- and these are not to delimit  
17 anything that we are looking at in our content  
18 model. In fact, I think, we want to be careful not  
19 to limit ourselves early on too much, but then step  
20 back. But I think it's important to keep in mind we  
21 have some experts like RJ, and Shanan, and Mark in  
22 job analysis, and you know, have done these kind of



1 analyses for firms.

2 I also want to say in developing a  
3 national system, we have keep in mind that there are  
4 going to be a whole host of issues that you deal  
5 with that will, to some degree, limit what you might  
6 ideally like -- you know, want to do. I mean, that  
7 both in terms of aggregation of categories, whatever  
8 we call them; but also the level of detail that you  
9 collect.

10 Secondly, one of the things -- the  
11 dictionary of occupational titles, which, of course,  
12 for many years is the Bible for the Department of  
13 Labor, and then for the disability program, I think  
14 it's important to keep in mind, as we look down the  
15 road for, you know, statistical reliability and  
16 validity, that the Dictionary of Occupational Titles  
17 is about as far away as you can possibly be from any  
18 sort of a statistical foundation that would hold  
19 water in any court, but it worked.

20 You know, why it worked, how it worked,  
21 how well it worked are issues other people can look  
22 at. I bring that up here because that's something

1 that's going to be very, very important, perhaps,  
2 when we kind of step down ultimately from what we  
3 want, to make sure it matches the DDS needs, and  
4 also what can be done. That's another area.

5 I just say right now, there is no other  
6 organization in the country that in the last 15  
7 years has taken on looking at what that takes; and  
8 again, that's the work that was done in O\*Net.  
9 That's really important. There are so many issues  
10 that we have to deal with. And I will just throw it  
11 out on the table, I come from an economics and mass  
12 stat background. I, in some ways, think we want to  
13 also think about not limiting ourselves to totally  
14 statistical valid information.

15 Where we can habit statistically valid  
16 through good sampling techniques and things I think  
17 is going to be very important. I think we're going  
18 to find very early on some of the information is not  
19 going to lend itself to that. I am going to step  
20 back to what is good enough and supportable enough  
21 to be used to inform the decisions made by the  
22 Social Security personnel? Because ultimately, it's

1 not going to be a computer system that makes the  
2 decision. It is going to be, is that information  
3 good enough to inform those decisions so that the  
4 right decisions can be made for the applicant and  
5 for the Agency? It's a little long winded, but I  
6 just know how much -- how huge a problem that is.  
7 Looking at it nationally is quite differently than  
8 looking at it as doing an analysis in an individual  
9 company or organization.

10 DR. GIBSON: For what level, Jim?

11 MR. WOODS: The level that you have -- I  
12 have a note here that the step -- kind of the three  
13 and the four there, I think, is the right level; but  
14 I'm going to say in some of those cases, it may not  
15 necessarily be statistically valid information. I  
16 don't think that necessarily is going to hurt us.

17 Where I think it's really important,  
18 though, is going to be on some of those medical  
19 mental capacity attributes. I think work is going  
20 to be harder on that end. There is where, I think,  
21 you are going to have a stronger foundation. Some  
22 ways on the transferability of skills, I think that

1 can be a little bit looser and still be very  
2 powerful and useful.

3 MS. LECHNER: I would just like to say  
4 that, you know, I agree with Tom that we should not  
5 limit ourselves necessarily, but -- and that,  
6 perhaps, the DOT did drive the aggregation that  
7 Social Security has used; but at the same time I  
8 think there is probably, you -- there is probably  
9 more detail in a given classification system than  
10 what has been used.

11 So I think that some of the aggregation  
12 happened because that fits a need for Social  
13 Security. The adjudicators did aggregate  
14 information that was in the current DOT down to the  
15 medium, sedentary, light, and they did that for a  
16 reason. So I would like to hear more about how that  
17 aggregation helps them in their process. Because we  
18 may choose a different aggregation. Our categories  
19 may be different; but there may be a need to  
20 aggregate down into one overall descriptors that  
21 categorizes a job in terms of the physical exertion,  
22 sedentary, light, medium, or the skill level

1 required -- you know, that's a proxy for something  
2 else other than SVP.

3           So I think while we would advocate  
4 collecting data at a more detailed level, there may  
5 be a need for SSA to be able to aggregate that into  
6 some kind of meaningful category system.

7           DR. FRASER: Right now VE in a hearing,  
8 the judge basically ask three things, the DOT  
9 number, SVP classification, and the weight demands.  
10 That's what they ask in terms of each job. That's  
11 what it sort of aggregates down to.

12           MS. LECHNER: When you are processing the  
13 amount of claims, you are dealing with the volume of  
14 information you have to -- the system may need some  
15 sort of very simple ability to aggregate.

16           DR. BARROS-BAILEY: We are over our break  
17 period. I want to -- or break time. So I want to  
18 keep us on track, but I don't want to stifle the  
19 discussion. What the current question on the table  
20 was, in terms of the job side, what level of  
21 aggregation are we looking at?

22           What I am hearing is probably levels two

1 to three. Is that what most people are coming in  
2 at?

3 DR. GIBSON: Three to four.

4 DR. BARROS-BAILEY: Three to four, sorry.

5 MR. HARDY: Top to bottom.

6 DR. BARROS-BAILEY: It depends on which  
7 way you are going. Okay.

8 So let's go ahead and take a break. We  
9 have about 15 minutes break and come back in, in  
10 about 15 minutes and continue the discussion. Okay.  
11 Thank you.

12 (Whereupon, a recess was taken.)

13 DR. BARROS-BAILEY: Okay. We're going to  
14 be resuming here shortly. If anybody is interested  
15 in a copy of the content model, we have copies  
16 available.

17 Okay. I just wanted to repeat, if anybody  
18 is interested in a copy of the content model, we  
19 have copies available -- extra copies.

20 Okay. I just wanted to bring the  
21 discussion back to where we have been going in terms  
22 of the Panel's charge in terms of the content model.

1 Other points of discussion within the model areas  
2 that we need additional information and how we might  
3 want to get that information, in what type of  
4 content? Do we want reports, charts? How do we  
5 want to receive it, that kind of thing? By when  
6 would we like to receive that kind of information?  
7 So any thoughts to any of those questions.

8           Did anybody want to discuss further either  
9 on the person side or the job side some of the areas  
10 of -- or levels that we had been talking about?  
11 Either that, or some of the areas we wanted to look  
12 at in terms of content?

13           Go ahead, Mark.

14           DR. WILSON: I just wanted to say, which I  
15 mentioned previously, that maybe like put it in the  
16 form of a request. Unfortunately, David isn't able  
17 to be here today, and it would be useful, in some  
18 form of another, get his thoughts on this, given his  
19 professional background in the -- the sort of mental  
20 cognitive realm. I would really be interested to  
21 see what he would have to say on this sort of  
22 personal, mental cognitive realm.

1 DR. BARROS-BAILEY: Okay. Thank you, Jim.

2 MR. WOODS: I just wanted to clarify  
3 something that I had said earlier when I was talking  
4 about statistical validity, and I think we need kind  
5 of a rock solid foundation that has a good  
6 statistical basis. Is that what you told me to say,  
7 rock solid foundation?

8 MS. KARMAN: I did not tell you to say it.  
9 Just suggested.

10 MR. WOODS: This was from yesterday --  
11 remember the fungible robot.

12 No, seriously, the -- in an idea world,  
13 everything has a good statistical basis. But there  
14 are a lot of key data elements that, in fact, we  
15 could develop that are of a very sound statistical  
16 basis. There are other pieces of information that  
17 can be used upon which some of the inferences are  
18 drawn that it may not even be possible to  
19 necessarily get all of those kinds of data elements  
20 in a totally statistical, you know, valid sampling  
21 method.

22 There are a number of ways in which you



1 can get the information and have great confidence in  
2 that information, as far as being able to inform the  
3 decision makers that are using it. So I didn't mean  
4 to suggest that, you know, forget any sort of  
5 statistical approach.

6 DR. BARROS-BAILEY: Thank you. Go ahead.

7 MS. KARMAN: Another thing I thought I  
8 would add to the discussion we had left off with,  
9 with regard to what level of analysis might be  
10 useful for Social Security. And what I'm hearing  
11 from everybody, I think -- I think I would agree.  
12 That the level that you all -- that we're  
13 identifying seems like a good place to start. I  
14 think that makes sense.

15 One of the things I was wondering, if it  
16 would be useful for us to think in terms of -- at  
17 least for starters, would it be good for us to start  
18 by looking at the job side first, begin to develop  
19 that a little bit in terms of what categories -- you  
20 know, things we should be thinking about wanting to  
21 gather. And then walk that across to okay, then,  
22 what is it about the person side that would, you

1 know, connect that?

2 I was thinking that, perhaps, by way of  
3 providing a bit more information about what quote,  
4 unquote SSA's needs are, since that is one of our  
5 action items, which we are already in process of  
6 doing, is that maybe we could -- our work group, and  
7 you know, the project team might be able to identify  
8 some of the categories of things. For example --  
9 and I think Deborah also mentioned some of these  
10 areas -- you know, work settings. You know, skill  
11 level, skill areas, you know. So we can begin to  
12 lay that out a little bit. And then that way the  
13 Panel has something to build on. Would that be  
14 useful?

15 DR. BARROS-BAILEY: I see some heads  
16 nodding that that would be useful; yes.

17 Mark.

18 DR. WILSON: Does anyone -- we heard from  
19 most people; but I wanted to make sure. Is there  
20 anyone who is uncomfortable with the level of  
21 analysis that we're talking about? Is everybody  
22 sort of on the same board in terms of --

1                   MS. RUTTLEDGE: This is Lynnae. I am on  
2 the same page with folks. What I always have to  
3 overlay in my head is that most of the times when  
4 you start to get down to the level of detail of the  
5 lowest tier, those are usually the kinds of task  
6 details that are able to be accommodated. And I  
7 would hesitate to have us get to that level, because  
8 we will be having disability examiners trying to  
9 make decisions about whether or not someone could do  
10 something that, in actuality, in the workplace could  
11 be accommodated. And we don't want to exclude that  
12 as a possibility, so I am fine with it.

13                   The other piece is that I would really  
14 appreciate -- this is going to put a lot of pressure  
15 on the project team. But I would really appreciate  
16 having the next set of information before we get to  
17 the meeting, so that we would have a chance to be  
18 able to look at it. And I take real seriously that  
19 I am here representing the field of vocational  
20 rehabilitation.

21                   I happen to be an astonishing brilliant  
22 individual, you know, but I don't know all this

1 stuff; and I would really want a chance to be able  
2 to look at it from the perspective of a practitioner  
3 who could help us be able to have some insight also.  
4 So thank you.

5 DR. BARROS-BAILEY: I just want to add  
6 something. I wasn't here for the preparations last  
7 couple of days, but there was a slide about  
8 accommodations and job restructuring; and I'm not  
9 really sure how that works within the process, if it  
10 works within the process; especially if we get to  
11 some levels.

12 MS. SHOR: If I can just make comment.  
13 Social Security's current policy is that the issue  
14 of accommodations is not relevant.

15 DR. BARROS-BAILEY: That was my  
16 understanding. So I'm not sure if that is  
17 something -- that's a question -- if that's  
18 something that becomes part of this process or not,  
19 because I wasn't here for that presentation.

20 MS. KARMAN: Yes. That's an excellent  
21 question. We did make an attempt to address that in  
22 our -- I think in the paper on our requirements

1 where we describe, first of all, would it be useful  
2 for Social Security to know what the essential  
3 functions of the job are? We were calling them core  
4 task, you know, for want of a better way of  
5 identifying it.

6           But in essence if we are capable of  
7 defining or identifying ways in which -- throughout  
8 several occupations or maybe among several  
9 occupations or within an industry there are options  
10 for accomplishing that the -- you know, that that  
11 occupation has available for a person to accomplish  
12 a particular core task. That's probably information  
13 that Social Security might want to have.

14           For example, the thing we frequently find  
15 is the sit/stand option. I mean, that's just  
16 forever we are always wondering, you know, well, you  
17 sort of can infer that some jobs would -- it's  
18 likely that -- you know, that the worker would be  
19 able to choose when they can sit or stand or perform  
20 their -- that task with that option available to  
21 them; but we don't know that for a fact.

22           So there are some things we probably would

1 want to be capturing, but not accommodations for the  
2 person. It's really, you know, is this option  
3 something that is -- that a job analyst would find  
4 available amongst, you know, a series of  
5 occupations, perhaps, within an industry or a  
6 certain type -- certain types of work. I don't know  
7 if I'm making myself clear. But it's not person  
8 oriented. It's really about does the job lend  
9 itself to the option being available?

10 DR. BARROS-BAILEY: So on the job side,  
11 kind of what you started us with in terms of one of  
12 the variables that need to be collected. Okay. Go  
13 ahead.

14 DR. GIBSON: It seems to me that to move  
15 forward in development of the job side of the  
16 content model, we have many options. I see two  
17 options that might lend themselves well. It kind of  
18 goes back to something I said yesterday.

19 On the one hand, we can start creating a  
20 list of characteristics that are relevant for the  
21 disability determination, and then going out there  
22 and seeing if there are -- if there are generalized

1 work activity taxonomies which capture these; or we  
2 can begin by finding generalized work activity  
3 taxonomies that are in existence, going through the  
4 taxonomy of GWAs, and seeing if any of these match  
5 up with types of job content which are important for  
6 making disability determinations. So I would just  
7 like to suggest that as one way to start to move  
8 forward.

9 I kind of like the last one, because we  
10 know there are taxonomies of GWAs out there that we  
11 can then go through the taxonomy and say, are these  
12 attributes important for disability determination?

13 DR. BARROS-BAILEY: Any thoughts or  
14 discussions on that?

15 MS. LECHNER: I'm not sure I fully  
16 understood what -- because I think you said on the  
17 one hand there is the option of starting with what  
18 they do now, and figuring out where the holes are.  
19 Is that what you said? Then, on the other side  
20 there is going and looking at the world of taxonomy,  
21 starting there. I need a clarification.

22 DR. GIBSON: No. On the first side I said

1 we can start developing a list of those job  
2 characteristics we think are important, and then  
3 find taxonomies to match that list. Or we can start  
4 with the taxonomies that are in existence and see if  
5 they include things which are representative of the  
6 characteristic of work we want to identify.

7 DR. BARROS-BAILEY: Mark.

8 DR. WILSON: I agree with Shanan. I like  
9 the second approach better. I think it will lead us  
10 to more systematically consider sort of work space,  
11 and will allow Social Security Administration to  
12 sort of see what the work descriptors options are,  
13 which they can fit into their particular problem.  
14 Rather than -- I think if we start with their  
15 determination issues, there may be things that they  
16 want to consider that they don't know that they want  
17 to consider, because as several people have said, I  
18 don't know if they are fungible DOT robots. It is  
19 hard for them to not think in terms of that  
20 particular frame work.

21 So I think that's what we would get back  
22 from them if we approached it that way. It doesn't



1 mean that that content that they want isn't  
2 ultimately going to be in there. I just think it  
3 would be -- my opinion it would be better to start  
4 with the low.

5 MS. LECHNER: Do we have to start with  
6 either/or? Could we not have, okay, on this side is  
7 the list of what they believe they need now? On  
8 this side are the existing taxonomies where there is  
9 a cross walk. Because I think that -- you know, my  
10 fear, when I start to hear about we're going to go  
11 out and look at all the taxonomies available, you  
12 know; I harken back to the disability redesign.  
13 That's sort of where that whole team started. The  
14 team got really bogged down into let's look at all  
15 the taxonomies out there.

16 You know, that's a huge world of  
17 information. And I would recommend that we not do  
18 that.

19 DR. BARROS-BAILEY: Any other information?  
20 So it sounds like what I am hearing is kind of a  
21 meeting of both sides, in terms of looking at the  
22 needs from the Agency standpoint, and also the

1 information out there in terms of taxonomies and  
2 taking a look at cross walking those and preparing  
3 those.

4 MS. LECHNER: I would like to go back. I  
5 know -- I don't want to beat a dead horse on this.  
6 But on the stuff that I have done in the past, in  
7 terms of looking at trying to developing things, if  
8 I start looking with what's being done now, I tend  
9 to learn a lot about pragmatic information that  
10 helps me define that process. Not that I'm trying  
11 to change the Social Security process or the  
12 disability determination process; but if I watch  
13 someone actually do that process, I learn a lot  
14 about that.

15 And I know that there are confidentiality  
16 issues. I know that there are some options of  
17 demoing some things to us. But my request would be  
18 that if there are demos, it is a demo of somebody  
19 actually going through that determination process  
20 not with information they're familiar with, but with  
21 a brand new fresh set of information that's been  
22 sanitized so we actually see the decision making

1 process that occurs. Because I think that will help  
2 drive some of what we do to some extent.

3 DR. BARROS-BAILEY: So you are kind of  
4 talking about us doing a -- kind of a motion study.  
5 I'm just kidding. I understand what you are saying.  
6 Okay. Any thoughts about that aspect?

7 Go ahead, Tom.

8 MR. HARDY: I couldn't agree more. I  
9 really would like to beat the dead horse with you.  
10 I really would. Because the end user truly is going  
11 to be the DDS worker trying to adjudicate a claim,  
12 and sitting down and really seeing how that is done.  
13 A lot of times, you know, we're sitting in a nice  
14 room with, you know, our little round table here.  
15 We're working at a certain level, but there is also  
16 the level where it gets done. I would love to see  
17 how that's done and what someone is doing to deal  
18 with some of the problems, and what some of their  
19 problems are that maybe have not reached this room.

20 I don't know if we are ever going to find  
21 that if we get pretty handouts. No offense, I love  
22 pretty handouts. They are very nice, very useful.

1 I very much agree with Deborah. I think we need to  
2 see something far more closer to actual life.

3 DR. FRASER: I would just like to endorse  
4 what was mentioned yesterday was trying to get a  
5 panel of VEs here. Not to understand so much what  
6 they do, but what they wrestle with. You know, what  
7 their challenges are given the existing system. I  
8 think that would help us so much. We can set up a  
9 system that's still very difficult or challenging to  
10 these people, and they have the ultimate job of  
11 making these crosswalks.

12 MS. LECHNER: Yes, I would really like to  
13 see what they do in the cognitive and behavioral  
14 area, because I know that they must struggle with  
15 some of those cases, and get some of those issues  
16 out on the table.

17 MS. SHOR: I think that would be a great  
18 idea. What I would really like to ask for would be  
19 maybe a couple of redacted claims files, and how  
20 they look when they come into, say, the agency.  
21 Maybe an SSI claimant with no work history at all,  
22 and virtually no medical history at all.

1           These may be claims that are not the type  
2 of work that you all normally deal with. But there  
3 are a lot of folks bringing claims in who don't  
4 understand the process, they're struggling with the  
5 application, have very limited work history, if any  
6 work history at all. Very limited medical care.

7           They may go to clinics where no one is  
8 going to respond to a request for information, to an  
9 RFC. Look at what a consultative exam looks like,  
10 what kind of information is included there. And  
11 just to clarify, most people at the DDS level are  
12 not represented. So the representation levels that  
13 Judge Hatfield was talking about yesterday, that  
14 kicks in at the hearing level. Most claimants  
15 wouldn't have any reason to seek out representation,  
16 so they're really on their own.

17           I think it would be a marvelous connection  
18 between the kind of conversation that is taking  
19 place this morning, which has been fabulously  
20 educational for me; but I think to see what it is  
21 that a disability examiner is going to be looking  
22 at; and to tie that in a little bit with what are

1 you going to be asking the doctors and the medical  
2 providers for. What kind of data is going to come  
3 in that you are going to need in order to use the  
4 system? So I think a redacted -- several redacted  
5 claims files would be really helpful.

6 DR. BARROS-BAILEY: Tom.

7 MR. HARDY: I don't know what kind OF  
8 process you are thinking of, Deb, as far as how we  
9 get that information, but for me I wouldn't -- I  
10 know there is a DDS office near my office. And if  
11 there is some way that the work panel could clear it  
12 for us, I would love to go into a DDS office. And I  
13 will sign a confidentiality and all that stuff. And  
14 I would like to spend a day, just sit with someone,  
15 sit with several people; and say, show me what you  
16 do. Show me how you do it. Show me what the issue  
17 is.

18 I would like to see that happen before the  
19 next meeting so that we have done that piece without  
20 having taken time during a meeting to get a  
21 presentation, per se. That's the suggestion I would  
22 like to make.

1 DR. BARROS-BAILEY: So it sounds like we  
2 have a lot of consensus in terms of wanting to  
3 really understand what happens within that process.

4 There is a variety of recommendations.  
5 The Panel working through maybe a couple of  
6 different cases that are actual cases; and us  
7 working through as a committee, or us individually  
8 going within our communities to the DDS offices. I  
9 don't know what would be the most feasible in terms  
10 of issues of confidentiality and that type of thing  
11 in terms of working with SSA to make that a  
12 possibility.

13 Okay. Go ahead, Mark.

14 DR. WILSON: Well, Nancy made an important  
15 point, which I think we have got an action item for  
16 already in terms of -- I don't know if we got the  
17 second part of that action. The first part is, what  
18 are the jobs people are coming in with? Then, I  
19 sort of revised that, well, what are the  
20 recommendations that are being made?

21 Because she made an excellent point that  
22 it could be that a lot of this kind of work is not

1 stuff that an industrial psychologist would normally  
2 deal with. We need to make sure that whatever model  
3 or analytic system we come up with is able to  
4 capture whatever variance exist in those kind of  
5 jobs and things of that sort.

6 I also want to echo I like Tom's idea. I  
7 don't think the two are mutually exclusive. I would  
8 like to see several redacted cases that are pulled  
9 to illustrate various principles. I think that  
10 would be important. I think it's absolutely  
11 essential that we be allowed -- you know, sign all  
12 the confidentiality and make sure -- we don't want  
13 to create any problems for these offices; but being  
14 able to, you know, approach a local office and spend  
15 a day there. That's the first thing I asked for  
16 when I was put on this panel.

17 DR. BARROS-BAILEY: Tom.

18 MR. HARDY: One more thing. What I, in my  
19 mind, am thinking is we're coming from all around  
20 the country as well. I think if each of us went out  
21 and saw what's happening -- I am in Pennsylvania.  
22 And how is my state dealing with these things?



1 What's the region like? What's common practice, is  
2 one thing. Then, perhaps, if we come back and look  
3 at some sample cases, we would all then also have  
4 different perspectives as to how different areas are  
5 dealing with different problems, and how they  
6 approach things. I think that can be very  
7 informative.

8 DR. BARROS-BAILEY: Okay. When we came  
9 back from the break, Sylvia started us off with  
10 maybe us looking at the job side. We started that  
11 in terms of the taxonomy. We kind of moved into the  
12 process between the two of them. I don't want to  
13 lose the job side to see if there is anything else  
14 we need to address there before we go on in terms of  
15 this discussion. Did everybody feel comfortable  
16 with where we were there? Mark.

17 DR. WILSON: Well, I think in terms of --  
18 Shanan proposed the initial how do we go about this.  
19 Then, there was some discussion of which of the two  
20 approaches. That's what seemed to get us into the  
21 DDS issue. We need to not lose track of who the end  
22 user is, and all that.

1           But in terms of generalized work activity,  
2 occupational descriptor taxonomies, we're not  
3 talking about a large number here. It is certainly  
4 well taken, but the field that we're going to get  
5 consumed with naval gazing over taxonomies I don't  
6 think is -- they are not a big risk of that given.

7           MS. LECHNER: So I'm taking it that you  
8 would like to present taxonomies that are out there  
9 at the next meeting?

10          DR. WILSON: Shanan got me on that one  
11 before, but we will work on it. Absolutely.

12          DR. BARROS-BAILEY: Any other thoughts or  
13 discussion around the job side?

14                 We have moved also into the discussion  
15 about some of the issues we want to see in terms of  
16 information for the match. Any other thoughts  
17 within that aspect or information we need?

18                 Okay. Go ahead, Jim.

19          MR. WOODS: Actually, different subject,  
20 but I will forget if I don't ask now. Yesterday,  
21 Mark referenced conveniently a couple of books that  
22 he has been involved in. Is there a way -- it would

1 be fine if we purchased it on our own dime -- but  
2 things like a history of job analysis? Might there  
3 be a way to get some -- we don't all have to have  
4 them, but maybe a collection of resources that we,  
5 at least, might be able to access, you know, as part  
6 of the project? If not, then, if we identify some,  
7 a couple of us can buy at least some of them.

8 DR. FRASER: Mark, is there a review  
9 article, you know, every "X" years, every ten years  
10 on job analysis?

11 DR. WILSON: I'm trying to -- no. The  
12 short answer is there isn't. I mean, probably the  
13 closest to it in terms of current activity that's  
14 going on is the handbook that we're editing, which  
15 is a substantial project and pretty much -- it very  
16 well could -- well, let me say this. It is my hope  
17 as the editor that by September we will have some  
18 sort of draft. We have to talk to the publishers.  
19 I don't know what can be shared, and things of that  
20 sort.

21 I also know, dealing with chapter authors,  
22 some of whom are in this room, that trying to -- you

1 know, this makes herding cats; but we can also maybe  
2 take -- between Shanan and I, take that on as an  
3 advisory. What kinds of things could we develop  
4 that would be useful sources of information for the  
5 Panel.

6 DR. BARROS-BAILEY: Okay. Anything else  
7 along those lines, resources?

8 I want to move over to the person side,  
9 okay. Is that okay?

10 We have talked about, I think, quite a bit  
11 this morning in terms of categories. I think the  
12 six categories that Deborah identified seemed to be  
13 broad, aggregate categories that most of our  
14 discussions fell into. I noted those down to  
15 include cognitive, physical, behavioral,  
16 environmental, perceptual or sensory, and skills.  
17 Is there anything else in terms of very broad  
18 categories?

19 MS. KARMAN: Yeah. I'm just wondering --  
20 maybe we already mentioned this, where would work  
21 settings be?

22 DR. BARROS-BAILEY: Environmental,

1 contextual.

2 MS. KARMAN: I didn't hear. We can call  
3 it that. Thanks.

4 DR. BARROS-BAILEY: Okay.

5 MS. LECHNER: I would encourage us as a  
6 group to think about these six categories as not  
7 just person side categories. These are the  
8 categories for the work and the person side. So if  
9 we could you know, start revising this little  
10 picture, it would have those six categories across  
11 the shop period.

12 DR. BARROS-BAILEY: Okay. Mark.

13 DR. WILSON: Well, I see it more as kind  
14 of a matrix. It may be that -- I have a couple  
15 issues with some of these six categories that I  
16 would have to look at, and kind of think about it  
17 for a little while. But I wouldn't see them  
18 necessarily as across the top, but potentially  
19 sources of linkage between the two.

20 MS. LECHNER: Yes, that's what I meant.

21 DR. BARROS-BAILEY: 3-D, instead of two  
22 dimensional in terms of --

1 DR. WILSON: Right. We're going to go  
2 multi-dimensional on you there.

3 DR. BARROS-BAILEY: Okay. Go ahead, Jim.

4 MR. WOODS: Kind of embarrassing. I tried  
5 to copy them before I missed it. Could you go  
6 through the six matrix items.

7 DR. BARROS-BAILEY: Sure. Physical,  
8 cognitive, behavioral, environmental "slash"  
9 contextual "slash" work site; five would be  
10 perceptual "slash" sensory; and then the sixth that  
11 was mentioned was skills.

12 Go ahead, Sylvia.

13 MS. KARMAN: One of the things that we  
14 have been talking about, and I don't know -- I mean,  
15 technically it would go in the context model in the  
16 sense that we would want to probably collect these  
17 things; but they aren't really about -- these are  
18 not pieces of information we would necessarily use  
19 to adjudicate the claim, but might inform policy  
20 development. And I'm just tossing that out as, you  
21 know, a box that we may want to have, you know,  
22 included. And some of that has to do with

1 demographic information, like the age of the worker,  
2 the education level of the worker, you know. I  
3 don't know.

4 I am just putting that out there, because,  
5 obviously, we would not use that to adjudicate a  
6 claim, because you wouldn't use that information to  
7 compare against the claimant. But that might be  
8 useful information for policy development. And we  
9 haven't finished thinking through what we might want  
10 in that area. I am just wondering if we want a  
11 little box just like other stuff that we might --  
12 you know, other pieces of information that might be  
13 valuable for Social Security's policy development;  
14 and I'm not sure exactly what that might be at this  
15 point, but --

16 DR. BARROS-BAILEY: So age, language  
17 proficiency.

18 MS. KARMAN: Actually, you reminded me of  
19 that. Thank you very much. Because there is  
20 something we actually would want to collect, which  
21 isn't about the -- the incumbent, or the person  
22 working the job, but literacy. Does the job require

1 you to read and write, and to be able to read and  
2 write; and if so, does it have to be in English?

3           Obviously, we will have to think about how  
4 we want to word that with regard to what is  
5 appropriate for our policy and what our needs are;  
6 but I mean, even if it's a binary thing. We are not  
7 going to sit here and start evaluating the degree to  
8 which people can read, but I think that's certainly  
9 another item. I don't know where that goes in  
10 this -- in these six things, or we just need a whole  
11 another calculate for literacy or what.

12           DR. BARROS-BAILEY: Does that fit into  
13 educational? That conversation that was held  
14 earlier.

15           MS. LECHNER: After we listed those six  
16 things, I think Bob mentioned educational  
17 requirements, so we may want to group that -- those  
18 literacy pieces. I don't know, maybe it's a stand  
19 alone. Maybe the seventh category is the  
20 educational requirement for the job.

21           DR. FRASER: We were talking on the break,  
22 and the huge problem there is the variance across



1 states, as you brought up, you know. Like, what did  
2 you say a counselor in the state of Alaska --

3 DR. BARROS-BAILEY: We were talking about  
4 in the context of certifications and licensing,  
5 because they're such variability across state. So  
6 that might not be a good demarcation in terms of a  
7 standard. We might want to look at other  
8 demarcations of a job.

9 MS. LECHNER: The other thing too that I  
10 think about -- as we think about going out and doing  
11 job analyses for these jobs, if we analyze jobs in  
12 different states, in different operations, that  
13 somehow we will probably end up, if we're doing job  
14 analysis, aggregating multiple analyses of the same  
15 job, and there will be differences. No question  
16 about it.

17 So that's, I think, one of the reasons  
18 that the DOT ended up with some ranges, because you  
19 can put something within a range -- you know, a  
20 single job can fall within a range of strength,  
21 demand, educational requirements, and SVP, and all  
22 that. So I think that's something we need to keep

1 in account as well, or think of that as well.

2 DR. BARROS-BAILEY: Go ahead.

3 DR. GIBSON: Two things. One thing,  
4 building on what Deborah just said. Particularly if  
5 we are looking at the occupational level, instead of  
6 the job level, there is going to have to be some  
7 ranges and consideration there.

8 Secondly, going back to something Mark  
9 said a moment ago, got me thinking as I was writing  
10 out the seven categories we currently have. I think  
11 this has to be perceived as a three dimensional type  
12 of orientation. Simply because, from my  
13 perspective, just for example, when we talk about  
14 the category of behavioral, to me, behavioral  
15 demands are actually a higher order, which then  
16 subsumes, physical, cognitive, and those other  
17 factors. So I don't think these can be seen as  
18 distinct characteristics, because many of them  
19 contribute to one another. So you have to have a  
20 hierarchical ranking of them to some degree.

21 DR. BARROS-BAILEY: Thoughts on that?

22 MS. KARMAN: I think I understand what you

1 mean. I wasn't part of the educational discussion,  
2 but I just want to make sure that we don't put too  
3 much energy into gathering information about what  
4 certifications are necessary, and that sort of  
5 thing. Unless we, as a group, begin to look at how  
6 do we want to determine skill level? Is that a  
7 marker for skill -- you know, to what extent would  
8 that be informative about the skill level of a job?  
9 If the occupation requires you to have so much  
10 education. You know, requires you to take certain  
11 tests.

12           You know, we don't ask about the claimant  
13 as to whether or not they are certified to fly a  
14 plane, and all that. Would they have licenses and  
15 stuff. We're not sure exactly how we want to look  
16 at skill level. So to the extent that education  
17 might be a useful marker for that, I can see that.

18           I just didn't want literacy to get lost in  
19 that. Because it's -- I'm not saying it has to  
20 stand alone -- and we certainly have it in our  
21 regulations under education. So I mean, certainly  
22 makes sense, but anyway.

1 DR. BARROS-BAILEY: Not that I tie myself  
2 to the DOT, but if I think about it in that context,  
3 it would be the GED levels that you can clinically  
4 measure through achievement testing, in terms of  
5 looking at some levels of education. And so if  
6 we're looking at it from a measurement standpoint,  
7 that might be a beneficial way, rather than looking  
8 at some of the demarcations, like certification.  
9 Because in the U.S. that's like looking at 50  
10 different countries, in terms of their regulation at  
11 the state level for licensing, certification,  
12 different industries, that type of thing. So that  
13 might be a useful way to look at it?

14 MS. KARMAN: I mean, we may actually end  
15 up with a subcommittee here to try to tackle how do  
16 we want to deal with complexity level of the job?  
17 What's semi-skilled? Skilled? Right now, that's  
18 how we're thinking in those terms, but -- so we may  
19 end up trying to do something along those lines.  
20 How do we want to get at that?

21 Because right now the way we think of it  
22 is people get skills from their work. But how do

1 you assess the work to determine what the skill  
2 level is? So then you get, you know -- I don't  
3 know.

4 DR. BARROS-BAILEY: Okay. Go ahead, Jim.

5 MR. WOODS: The only thing I will say on  
6 the certification issue. One, actually I kind of  
7 discourage us from getting into the collection of  
8 that kind of information. It might be worthwhile  
9 to, at least, include it initially in a content  
10 model as a piece of information that you might look  
11 at down the road.

12 There has been actually some extensive  
13 work done initially on a system called LOIS,  
14 Licensed Occupational Information System; but it has  
15 now been subsumed in a larger part of labor system  
16 that actually does try to look at certifications and  
17 things across the country. You can never do that in  
18 its totality, but it may at least be a piece of  
19 information.

20 Where it could impact on this, possibly,  
21 would be if you are looking at transferability like  
22 in step five or something, and you are including it

1 in an occupation that is going to require a  
2 certification in almost every state, regardless of  
3 what their certification is, that's an important  
4 piece of information. Because it's hard to say,  
5 okay, they can just step in this job. Now, you may  
6 want to bury that information and not use, but it  
7 might be useful at least to have that and understand  
8 those relationships.

9 MS. KARMAN: Yes. I think you must have  
10 been reading my mind. Because what I was thinking  
11 was, it's not that we would look to see whether it  
12 requires certification so much as if it's -- if that  
13 is a standard, then, that tells you something about  
14 the complexity level of the job. So maybe  
15 therefore -- like right now, that might be an SVP of  
16 seven. You know, like well, what do you consider to  
17 be a seven?

18 So we would then -- based on what we know  
19 about the person's work experience, we would be  
20 saying this individual may or may not have that  
21 skill, that work experience to go do this. But we  
22 would not be looking at what certification do they

1 have, and that sort of thing. I thank you for  
2 making that point.

3 DR. BARROS-BAILEY: I am thinking about in  
4 the context of different occupations within the  
5 labor market, such as trades that becomes pretty  
6 significant within that.

7 We had moved over to the person side.  
8 Other areas within the person side that we want to  
9 address?

10 I just want to also bring us back to the  
11 task that's out there looming in September in terms  
12 of our charge, is to have a recommendation by the  
13 end of September regarding the occupational  
14 information that Social Security should collect; and  
15 to have a recommendation regarding the  
16 classification system.

17 So we have tried to summarize, you know,  
18 the job side, the person side, and that interaction  
19 between the two. Are there any other areas within  
20 that or beyond that, that we need to discuss within  
21 the content model?

22 MS. KARMAN: Are we coming away today

1 with -- I think we have several things that people  
2 are going to work on. I know we have some things we  
3 are going to need to work on. Do we want to try to  
4 make a list of what we want to be -- what we want to  
5 do before the next meeting with regard to content  
6 model, maybe? I don't know, is there a need for us  
7 to form smaller groups, or to have another  
8 conversation? If we get together as a whole group?  
9 Should it be a teleconference? I don't know.

10 DR. BARROS-BAILEY: I think that's  
11 where -- you mentioned subcommittees, in terms of  
12 the potential need to have subcommittees to address  
13 some of these topics. That would probably be a good  
14 discussion for us to segue into.

15 One of the things that I have heard and I  
16 saw in the materials is the issue about the  
17 cognitive "slash" behavioral aspect of jobs. Is  
18 that an area that people are feeling we need a lot  
19 more information; we need to have a focused effort  
20 around?

21 DR. GIBSON: We nominate David to head it  
22 up.



1 MR. HARDY: I was going to second that.

2 MR. WOODS: David is not here.

3 DR. BARROS-BAILEY: Okay. So we have an  
4 idea on the floor to have a subcommittee looking at  
5 the cognitive -- should we include behavioral with  
6 that? Or focus it on the cognitive demands of jobs?

7 DR. GIBSON: I was going to say, perhaps,  
8 to be more specific, we could ask Dave to act as the  
9 lead agent in creating for us or bringing together  
10 for us some of the current best research in  
11 cognitive taxonomies of human functioning.

12 DR. BARROS-BAILEY: Okay. Any thoughts on  
13 that?

14 DR. FRASER: I would work with Dave on  
15 that, if that's helpful.

16 DR. BARROS-BAILEY: Okay. Robert Fraser  
17 to work on that as well. Anybody else? Okay.

18 Other areas of focus that we feel we need  
19 to address in terms of subcommittee?

20 MR. WOODS: The general --

21 DR. GIBSON: The Mark subcommittee.

22 DR. WILSON: The Shanan subcommittee.

1 DR. BARROS-BAILEY: The Mark/Shanan  
2 subcommittee.

3 MR. WOODS: If they accept me -- I don't  
4 have the academic background they have -- I would  
5 like to help out on that.

6 DR. BARROS-BAILEY: Okay. The job  
7 analysis. Is that in terms of the taxonomies?

8 DR. GIBSON: A taxonomy of generalized  
9 work activities, which might be appropriate for  
10 disability determination.

11 DR. BARROS-BAILEY: Okay. Other areas?  
12 Anybody else who wants to work with the Shanan/Mark  
13 subcommittee?

14 Okay. Jim.

15 DR. WILSON: We're going to call it the  
16 Woods Commission now.

17 DR. BARROS-BAILEY: Okay. Other  
18 subcommittees. Other areas of focus. Mark.

19 DR. WILSON: The other task I was actually  
20 writing down is general job analysis, information  
21 sources; you know, put together a little list of  
22 reference materials.

1 DR. BARROS-BAILEY: Okay. Were you  
2 volunteering for that Mark?

3 DR. WILSON: Yes.

4 DR. BARROS-BAILEY: Okay. Is anybody  
5 joining Mark in that endeavor?

6 DR. GIBSON: I think he volunteered Jim  
7 and I, is what he just did.

8 DR. BARROS-BAILEY: Okay. Deborah, you  
9 have your mike on. Were you trying to get a word?  
10 Okay. I just wanted to make sure that I wasn't  
11 missing you.

12 Go ahead, Shanan.

13 DR. GIBSON: I was just going to make  
14 another recommendation, not for our subcommittee,  
15 but based on what Deborah said, I think it would be  
16 important to have another subcommittee begin  
17 establishing a list of what we think are needs, or  
18 items or characteristics, may be based on the old  
19 RFCs or things of that nature that DDS is using.

20 MS. LECHNER: Clarify that again, Shanan.

21 DR. GIBSON: Just going back to doing them  
22 simultaneously, I said taxonomies of generalized

1 work activities. You said we could simultaneously  
2 be actually looking at what DDS needs. From my  
3 perspective, I was looking at what DDS is use to  
4 using in the form of an RFC. Whatever  
5 characteristics that DDS would say they need to make  
6 a disability designation.

7 MS. KARMAN: I could do that. I would be  
8 happy to have help. I think that would make sense  
9 for us -- for me to do that.

10 DR. BARROS-BAILEY: Okay.

11 MS. KARMAN: So are we going to be a  
12 subcommittee? Or no?

13 DR. BARROS-BAILEY: Sounds like --

14 MS. KARMAN: Why don't I just go off and  
15 do that. Just shut up and go do it.

16 MS. LECHNER: Would there be -- I think  
17 there is several of us that expressed a real  
18 interest in sort of watching the process -- the DDS  
19 process. Would there be another subcommittee that  
20 might kind of pool our ideas about that after we  
21 have had the chance to observe and just to say, you  
22 know, yes; these are the characteristics that are

1 currently in the RFC; but these are the areas that  
2 we see in the process that beg other information or  
3 require or would benefit from additional  
4 information? I don't know if that's -- I don't know  
5 if that's a subcommittee. I don't know if that's  
6 something we all do.

7 DR. BARROS-BAILEY: Tom, that looks like a  
8 question there, or a comment.

9 MR. HARDY: I could see that as a kind of  
10 a coalition activity and a collection of data.  
11 Again, if we're trying to move forward as quickly as  
12 possible, I think it makes a lot of sense for us to  
13 do that prior to the next meeting. So yes, I guess  
14 it would be a subcommittee activity.

15 DR. BARROS-BAILEY: Who is volunteering  
16 for that?

17 MS. LECHNER: Tom.

18 DR. BARROS-BAILEY: Okay. Would anybody  
19 like to join him on that? Deborah.

20 Okay. Anybody else want to have input  
21 into that, be involved at that level?

22 Go ahead, Sylvia.

1 MS. KARMAN: I was just going to ask a  
2 question. Because I have a feeling that -- I think  
3 there may be something that we will -- Social  
4 Security will need to do to operationalize this.  
5 Let me just understand what you guys are looking  
6 for, so I can go back and work with whomever.

7 Are you looking to actually get to a DDS  
8 before the next -- the two of you -- is that what I  
9 am hearing?

10 DR. BARROS-BAILEY: And Mark as well.

11 DR. GIBSON: I think we all want to go.

12 MS. KARMAN: All right. Yes. Like I  
13 said, I'm going to have to see what I can arrange.

14 I think one of the things, then, we would  
15 need to do -- and so if you are going to do this as  
16 a subcommittee -- is we will have to work on what is  
17 it is we want to observe. Who it is we want to talk  
18 to there. You know, what kinds of questions we're  
19 asking. So I mean, I guess, I want to have sort of  
20 a structured what it is we're going to do once we  
21 get there.

22 DR. BARROS-BAILEY: Maybe that could be

1 one of the things the subcommittee does is work with  
2 SSA on that. And I am assuming that it wouldn't be  
3 exclusive to the subcommittee in terms of being  
4 involved in that process. That all panel members  
5 would be involved in that process.

6 MS. LECHNER: I sort of see the  
7 subcommittee's role of defining what information we  
8 want people to be gathering while they're out there,  
9 so it's more of a directed -- sort of a Sylvia  
10 thing -- want it to be a little more of a directed  
11 activity. Then maybe some information report back  
12 to the subcommittee that, then, kind of collates it,  
13 and presents it to the group of, here were the key  
14 findings. Here are the things that, you know, most  
15 of us saw. Here are the things that are a few  
16 outliers, and so on.

17 MS. RUTTLEDGE: This is Lynnae. I will be  
18 glad to work on that also.

19 MS. KARMAN: Just to follow-up on the  
20 subcommittee of one, because I think I am only one  
21 person here.

22 MS. RUTTLEDGE: I will join you, Sylvia.

1           MS. KARMAN:  What items from the RFC that  
2   are of value to -- I mean, to the content model that  
3   we would want to include.  I wrote down RFC and  
4   MRFC.  So what I am hearing is, what is it that  
5   Social Security right now looks at in its cases.  
6   And we're using RFC, MRFC as sort of -- yes,  
7   interchangable.  It's a proxy for what bits of  
8   information do we care about when we look at  
9   people's function?  So whether it's on the current  
10  MRFC or RFC now, it is not --

11           DR. GIBSON:  Should be.

12           MS. KARMAN:  Okay.  Thank you.

13           MS. LECHNER:  The other question I had is  
14  since we're starting that work on the cognitive  
15  taxonomies, do we need something in the physical  
16  realm as well?  Or will Mark, and Shanan's, and  
17  Jim's work cover the taxonomies in general?

18           DR. WILSON:  The job, as I understood it,  
19  was to look at generalized work behavior,  
20  generalized work activity taxonomies, which probably  
21  wouldn't include anything specific.  Just, you  
22  know -- that would seem to me to be more on the



1 person side if you are talking like a Fleishman  
2 taxonomy of physical attributes, and physical  
3 capabilities, things of that sort.

4 DR. BARROS-BAILEY: So --

5 MS. LECHNER: So clarify for me a little  
6 bit, Mark, about what the taxonomies that you, and  
7 Shanan, and Jim are going to be looking at would be.

8 DR. WILSON: Right. If you look back at  
9 that content model document -- which I can't find at  
10 the moment. Yes, exactly.

11 If you look at the content model -- are we  
12 counting from the top or the bottom? The fourth  
13 level, "use weapons; use hand-held measuring  
14 devices," as examples or items or exemplars. It  
15 would be rational and empirical taxonomies of those  
16 kind of statements, sort of -- of which there are a  
17 few.

18 There is not a lot of research in this  
19 area because, you know -- that's why Tom's point was  
20 so important is, you know, we may find a different  
21 dimensionality or may want to alter some of the ones  
22 that exist. Because the nature of this research --

1 you know, you can imagine there aren't that many  
2 people who can model the entire U.S. economy in  
3 terms of its work characteristics and look at the  
4 underlying dimensionality of that. There are some  
5 people who have done it empirically and some people  
6 who have done it more, who have done it rationally;  
7 but there aren't that many to choose from.

8 DR. GIBSON: I was going to say, to go  
9 towards answering Deborah's question, I think what  
10 this presents is one level up above what you are  
11 asking for in physical attributes. For example,  
12 "use hand-held measuring devices" is probably --  
13 beneath what would be more specific items, like the  
14 fingering, or the manual dexterity, or the specific  
15 physical attributes that you are asking about, if I  
16 understand you correctly.

17 MS. LECHNER: So if we -- if David's  
18 beginning work -- David and Bob are beginning to  
19 work on the cognitive taxonomy, should we be  
20 beginning work on the physical as well? I would be  
21 happy to volunteer for that if I have somebody that  
22 can help me on that.

1 DR. BARROS-BAILEY: Okay. So proposal for  
2 subcommittee in terms of looking at the physical  
3 demands. Anybody would like to join -- Tom. You  
4 would like to volunteer me for that?

5 Sure. On the person side -- well, both.  
6 Deborah and myself.

7 Anybody else would like to be involved  
8 with that?

9 Just to confirm in terms of the  
10 subcommittees, there will be somebody from the  
11 project team that would be involved with each  
12 subcommittee in terms of support.

13 DR. GIBSON: Just an observation. I think  
14 that Deborah and Mary's subgroup -- subcommittee  
15 will probably then interact very much with Sylvia's,  
16 since she is going back. Now you are a group of  
17 three.

18 MS. KARMAN: Yeah, I'm seeing that too,  
19 because I am sort of off here. What I am doing is  
20 not really a subcommittee. Just like I have an  
21 action item to go back and pull some stuff together,  
22 which we have already begun to do.

1           And so probably what we will want to do is  
2 take what we have already gathered, and see if there  
3 is more that we might want to add to it. Not that  
4 it has to be an exhaustive list at this point,  
5 because, of course, you know, just to get us some  
6 categories. But to somehow put it into a hierarchy,  
7 at least from the second level up, third up, just so  
8 we can show them in a way that will enable us to all  
9 talk about it in a more universal sense.

10           Because a lot of what we would look at in  
11 an RFC is going to be the fingering, the handling,  
12 either -- the more specific. I guess what, perhaps,  
13 Shanan and Mark might call the item level. I'm not  
14 even sure if that's correct.

15           DR. BARROS-BAILEY: So you are not a  
16 subcommittee?

17           MS. KARMAN: Well, I mean, I don't know if  
18 somebody wants to work with me. Actually, you know  
19 what, maybe Nancy Shor and I can do that, since both  
20 of us have a connection with Social Security.  
21 Perhaps, that would be a really good thing to do.  
22 Sorry I didn't think of that earlier.

1                   But -- so Nancy, maybe what we will do is  
2 I will get started with some of what we have already  
3 done and share that with you; then, we will talk,  
4 okay.

5                   DR. FRASER: Is our contact information in  
6 here? Because our bios and stuff are in here. I'm  
7 not sure.

8                   DR. BARROS-BAILEY: Debra will e-mail that  
9 to the Panel in terms of the contact information for  
10 everybody. Okay.

11                   I know we talked about -- what, about  
12 seven elements being cross walked on both sides, the  
13 person side, job side. We have subcommittees for  
14 the physical, cognitive "slash" behavioral. Do we  
15 need any for the other areas that are across the  
16 line, the environmental "slash" contextual; the  
17 perceptual "slash" sensory? Is that being captured  
18 in some of what we're looking at? The educational,  
19 the GED.

20                   Go ahead, Mark.

21                   DR. WILSON: I have been thinking about  
22 that some, but it might be in terms of a way to

1 proceed. I think once we sort of flush out the  
2 person side and the job side a little more, then I  
3 think -- once those are completed it may be easier  
4 to address some of these inter-linkage issues. So I  
5 guess my recommendation would be to hold off on that  
6 a little bit.

7 DR. BARROS-BAILEY: Okay.

8 MS. KARMAN: I agree. Because I think  
9 that kind of gives us a better sense of where we're  
10 standing and what we want to fill in. And also, I  
11 think it might help us to be able to -- you know,  
12 without talking in such a theoretical sense, we may  
13 have something concrete to point to. That might  
14 help us with looking at the things involved with,  
15 for example, skill level, you know. So I agree.

16 DR. BARROS-BAILEY: Okay. Any other  
17 thoughts in terms of other areas we need to address,  
18 either as subcommittees or otherwise, in terms of  
19 the deliberations and what we have heard -- that  
20 most of you have heard over the last few days; I  
21 heard in the last few hours? Okay.

22 Okay. So in terms of -- any thoughts

1 about some remaining issues? Were there other  
2 things that we came here with that we haven't really  
3 taken up?

4 Jim.

5 MR. WOODS: I just want to point out a  
6 couple of things, and if it's of interest to the  
7 group, I can -- when we get the contact list -- send  
8 out some information. But there is an update of the  
9 standard occupational classification going on right  
10 now. And there is a recent Federal Register  
11 announcement on that. So just background  
12 information. Since ultimately one way or the other  
13 we will tie something to the SSA standard of  
14 occupation classification system.

15 And secondly, just again as background  
16 information, the National Academy of Sciences is  
17 doing a review -- let's say a review, not an  
18 evaluation -- of O\*Net with the draft report  
19 scheduled for -- I think it was a draft report for  
20 June. So as background information we might have a  
21 report in the summer that -- on O\*Net that may be  
22 useful just to look at if there are, you know, any

1 items in the process that were an asset.

2 And that's -- the National Academy of  
3 Sciences, our past experience with them, they did  
4 pretty thorough reviews of the system.

5 DR. BARROS-BAILEY: Mark.

6 DR. WILSON: Jim, do you know -- I was  
7 curious as to how do they go about deciding what  
8 they're doing to do? I mean, for us it's nice that  
9 they're going to take this up right now. But why,  
10 after all this time, would the Academy be looking at  
11 O\*Net? Is there some precipitating event here?

12 MR. WOODS: No. It's just that O\*Net --  
13 again, because of the scope and the nature of it,  
14 right now just filling the final data sets of O\*Net.  
15 So what the National Academy of Sciences is looking  
16 at is the whole process, but also how it's been used  
17 throughout the years. For the Department of Labor,  
18 that may inform the Department of Labor to what  
19 degree they continue investments in that area, for  
20 example.

21 DR. WILSON: So the idea would be, then,  
22 that we're nearing the end of a project. It's the



1 appropriate time to sort of --

2 MR. WOODS: Right.

3 DR. WILSON: I got it.

4 DR. BARROS-BAILEY: Go ahead, Nancy.

5 MS. SHOR: I just had one item. This may  
6 be a book that's super familiar to all of you. I  
7 didn't know -- not as any sort of expert in this  
8 field. It's a 1989 book from Institute of Medicine  
9 Committee to Review the Social Security  
10 Administration's Disability Decision Process  
11 Research. The title is "Measuring Functional  
12 Capacity and Work Requirements, Summary of a  
13 Workshop." So this is, you know, not something that  
14 I can digest very well. But everybody else in the  
15 room can. So if you are not familiar with this and  
16 you think it might be useful, great.

17 MS. LECHNER: The other thing that I was  
18 thinking might be helpful to have by our next  
19 meeting or in the interim is some sort of  
20 information about the short-term project; and I  
21 don't know, Sylvia, the timing on that. I can't  
22 remember exactly. But you know, particularly about

1 the different -- if there is some addition of  
2 occupations that will go on, or you know, just a  
3 little bit more details about that as you learn more  
4 about the short-term solution.

5 MS. KARMAN: We're expecting a final  
6 report from the evaluator -- from the contractor at  
7 the end of May. So unfortunately, it will be after  
8 we meet, because I understand our meeting is the  
9 last week in April. But we will certainly have  
10 something to report when we meet the third time, so.  
11 And we will probably be able to share information  
12 with the Panel in the meantime. But if we learn  
13 anything else in the meantime, certainly, we will  
14 convey that.

15 We will -- at the April meeting I  
16 anticipate being in a position to certainly provide  
17 updates on a lot of different things we're working  
18 on. For example, how we're coming along with the  
19 claims study to get at the profile of our claimants  
20 at the -- you know, all levels of adjudication for  
21 their past relevant work. What kind of jobs do they  
22 have?

1           And yes, Mark, we actually had planned to  
2 look at what kinds of jobs we're citing on a  
3 framework decision, particularly. The ones that are  
4 involving -- particularly the ones that might  
5 involve, you know, solely mental limitations, you  
6 know. But any of them, you know, whatever it is  
7 we're recommending.

8           DR. WILSON: Right.

9           DR. BARROS-BAILEY: Jim, you had your mic  
10 on. Did you want to add? Okay. Just want to make  
11 sure I cover everybody.

12           Other areas? Other resources? Other  
13 information point people would like to have.

14           Tom you look like you want to say  
15 something.

16           MR. HARDY: I always look like I want to  
17 say something. It doesn't mean I want to.

18           I am just thinking. I remember part of  
19 your workgroup is going to be outreach to the world,  
20 I guess is the way we put it. Will you be able to  
21 report back what you guys have been doing as far as  
22 outreach and where that's going? And while that

1 doesn't impact us directly, I would like to have  
2 some information as to how what we do impacts as  
3 well.

4 MS. KARMAN: That's not a bad idea to have  
5 as, you know, sort of a category that my team can be  
6 reporting on. You know, that we can -- I mean, I  
7 can bring that to the Panel and say, well, you know,  
8 within the last quarter we spoke with so and so. We  
9 met with whomever. You know, we have been to this  
10 conference or that conference. You know, and just  
11 hit the highlights, or at least, you know, have that  
12 information available. So we can do that.

13 And I'm not going to forget about having  
14 the VEs, because we're thinking maybe that would be  
15 good to ask VE to come or maybe more than one to  
16 come and actually provide or give a presentation at  
17 the next meeting.

18 DR. FRASER: I think that would be great.  
19 Certainly through Atlanta we can do that.

20 MS. KARMAN: Yes.

21 DR. BARROS-BAILEY: Jim.

22 MR. WOODS: Outreach, just to remind me,

1 do we know yet what kind of information we plan to  
2 keep on the web site for public consumption? If  
3 not, if that's going to be something that you will  
4 be looking at?

5 MS. TIDWELL-PETERS: When you mean type  
6 of information, do you mean, for example,  
7 presentations from the meeting or do you mean  
8 documents as the Panel does its work?

9 MR. WOODS: Yes.

10 MS. TIDWELL-PETERS: You mean both?

11 MR. WOODS: It's not even suggesting. I  
12 was just curious whether that's something that you  
13 have been thinking about. I have looked -- a lot of  
14 times on panels, including some Social Security  
15 panels, the information is quite limited. That may  
16 be very reasonable. I was just wondering how much  
17 of the information we might be trying to make  
18 available to the public, if any? It's not an  
19 important issue for right now; but it's just  
20 something that's under consideration.

21 MS. TIDWELL-PETERS: We have  
22 considerations whenever we post to our web site, 508

1   compliance.  So we're always looking at, number one,  
2   if we can make information available?  How we can  
3   make it available?  And is it doable with our staff  
4   members, in terms of making sure that all the  
5   presentations are compliant?

6                   We have the Panel mailboxes open, and my  
7   information is published.  Anyone requiring can  
8   request information through the web site or by  
9   direct contact with me.  And as we move forward, we  
10  can discuss if the Panel -- if there is information  
11  we would like to make public on the web site.

12                  DR. GIBSON:  If not making it public, is  
13  it possible to consider developing a share point  
14  site off of that for the panel members, since we're  
15  geographically dispersed?

16                  MS. TIDWELL-PETERS:  I will investigate  
17  that, and get back to you at the next meeting.

18                  DR. WILSON:  Just kind of as a general  
19  comment.  I don't even know if this is the right  
20  time to bring it up.  One of the hopes that I have,  
21  as we move through this process, especially when we  
22  get to various data collection points; it would be

1 particularly helpful if, obviously, remove any kind  
2 of information that would violate privacy or  
3 whatever to develop consortium with researchers.  
4 Allow people to have access to data to, as we make  
5 our deliberations over empirical taxonomies. Those  
6 sorts of things that various researchers -- I don't  
7 know if that would be some kind of a consortium  
8 where they would have to join or whatever; but the  
9 idea would be that as many people as possible get  
10 access to data, analyze it, debate what the  
11 appropriate data analytic strategies are, and things  
12 of that sort. I think because there has been so  
13 little research in this area, there is not as much  
14 empirical guidance.

15 I would like to benefit from other  
16 people's viewpoints. If people have completely  
17 different orientation than me in terms of what's the  
18 appropriate way to analyze this, those sorts of  
19 things, I think that would be useful information to  
20 have. Exactly what the structure of that is, and  
21 how that would be carried out, I don't know.

22 I guess what I am saying is I would like

1 to be as open as possible with the data analytic  
2 aspects of what we do, and inviting as many  
3 different eyes as possible. Sort of an open source  
4 framework to look at the information.

5 DR. BARROS-BAILEY: Any thoughts about  
6 that? I mean, implications?

7 Are you talking about it more at the  
8 debate stage or public commentary stage, or what are  
9 you envisioning or both?

10 DR. WILSON: I guess what I am thinking of  
11 is that to some extent, some of -- I guess we had to  
12 quote "Star Trek" sooner or later. I mean, we are  
13 sort of boldly going where people haven't been  
14 before. The farther out there we get, the more I  
15 would be interested in seeing what various  
16 colleagues might have to say about it.

17 So I don't know exactly how, but I guess  
18 what I am saying is I hope we find some vehicle to  
19 present some of what we're doing back to the  
20 scientific community to somehow have them involved  
21 and be able to comment at various stages before we  
22 get to the end, before we make all the decisions,



1 that sort of thing.

2           So as a particular -- you know, let's say  
3 we develop a taxonomy and we all agree, and then we  
4 go out and collect some data and we think we have  
5 got it. I think at that point would be good to  
6 share that with the community, invite comment, you  
7 know, maybe present it at some meetings, things of  
8 that sort. I think that also helps in terms of  
9 legal defensibility. If we go through that process,  
10 have things peer reviewed, that sort of thing would  
11 be valuable for the Agency too.

12           DR. BARROS-BAILEY: Sylvia, you're heading  
13 there?

14           MS. KARMAN: Yes. I agree that, you know,  
15 sharing what our plans are, some of the things that  
16 we have thought through as a Panel, the things that  
17 Social Security is, you know, looking at doing. If  
18 we are able --to the extent that we can put some of  
19 that information, make that widely available either  
20 through presenting it as papers at various  
21 conferences, and making it available, perhaps -- I  
22 don't know if we want to do something with using it

1 on our web site right now. I mean, I don't know.  
2 Operationalizing it is something else, but.

3 DR. WILSON: Right.

4 MS. KARMAN: You are right, if we can  
5 invite commentary, or even invite people to begin to  
6 go off and do research in certain areas. While  
7 we're doing our work, they're also looking at  
8 certain things that's going to inform the whole  
9 process later on down the road as well. This is not  
10 a static thing. It is not like we build this and it  
11 goes away and just sits there. You know, that would  
12 be a good thing to do just have that -- from the  
13 beginning to have that sense that we're inviting  
14 assessment. We are inviting the ideas. We're  
15 inviting the critique.

16 I mean, ultimately, the Agency will have  
17 to make decisions about what it needs to do, and  
18 where it needs to go. I think we have a really  
19 great opportunity here, especially since there  
20 hasn't been an enormous amount of focus in this area  
21 in terms of researching.

22 MR. WOODS: Sylvia, you covered, I think,

1 it is important that maybe looking at how we do that  
2 is something that we can delay right now; but the  
3 idea, you know, keeping that in mind, a way before  
4 we get so far down the road that we got Federal  
5 Register announcements; here is a draft we're  
6 thinking about before the formal process. So I  
7 think the notion of, you know, presentations.

8           The web may not work because, as you may  
9 have gathered, from what Debra said, putting stuff  
10 on the web in the Federal Government, there is a lot  
11 of clearances you go through. I really like the  
12 idea there is a way to communicate it through  
13 conferences or whatever we do, and figure that out  
14 down the road.

15           MS. LECHNER: Also, it raises a question  
16 for me as I go back and think about doing some other  
17 work in our committees, and subcommittees. Let's  
18 say Mary and I are working on the physical  
19 taxonomies, and we have colleagues that we would  
20 like to solicit either opinion or share kind of this  
21 is our preliminary thoughts, what do you think as  
22 well? How open can we be? And how much can we

1 reach out like that, or should we not reach out?

2 MS. KARMAN: Debra, is there something we  
3 should know from the FACA point of view that  
4 would --

5 MS. TIDWELL-PETERS: Well, from our FACA  
6 guidelines, the work of the subcommittees always  
7 comes back to the Panel for full vote and  
8 deliberation. So there is no individual decisions  
9 that any subcommittees can make. You can reach out,  
10 of course, in terms of doing research if you need  
11 background and research. That would be appropriate.

12 MS. KARMAN: So I think, then, the same  
13 thing would be with regard to any of us, in terms of  
14 we've reached out, gotten this piece of data from  
15 this person, or this set of -- this idea or whatever  
16 methodology as developed by so and so, and such and  
17 such paper published here and there. So in other  
18 words, to be able to cite it is going to be  
19 something that we want to do.

20 We were held to that when we were  
21 developing our presentations and things. Since  
22 we're going to be making that available to the

1 public, anything that we present to the Panel is  
2 available to the public, so we have some kind of  
3 paper trail where these things came from. I am glad  
4 to hear that we will be able to reach out.

5 DR. BARROS-BAILEY: As we head into our  
6 last hour, I just want to start wrapping this  
7 together, in terms of any loose ends. We have  
8 already identified some subcommittees, and kind of  
9 take us to an action plan that we have been coming  
10 to of what we want to have for the April meeting;  
11 and then discuss the July and September meetings as  
12 well.

13 So in terms of the different subcommittees  
14 and things we have talked about. we have talked  
15 about some things that would be nice to have before  
16 the April meeting. I just want to see if we can get  
17 a summary of those from the Panel members, so we  
18 have kind of a clear idea of that. Anybody could  
19 start.

20 DR. GIBSON: Okay. The Woods consortium  
21 and what -- I think our expectation is to present  
22 two things to the committee in April. One, to have

1 located all relevant taxonomies of generalized work  
2 activities, and compiled a list of the categories  
3 within them.

4 Two, to create a job analysis resource  
5 list so that individuals who wish to do more  
6 research on job analysis and the various  
7 methodologies of doing so have some articles they  
8 can go back and consult if they so desire.

9 DR. BARROS-BAILEY: If we want to maybe  
10 put a time limit on that, so that staff could have  
11 time to get everything together and get it to us  
12 before we go to the April time meeting. Do we want  
13 to -- what's the good time?

14 MS. TIDWELL-PETERS: I'm going to suggest  
15 this, I'm going to ask our transcriptionist if she  
16 would provide us with the transcript from this  
17 morning's proceedings first. That way, we will all  
18 be able to collect our notes and we will actually  
19 have a verbatim transcript of exactly what we're  
20 going to provide.

21 Then I would suggest that one of our  
22 action items with a date that we plan to have our

1 staff -- panel staff, team staff reach out to the  
2 leads for the various subcommittees and first  
3 schedule a first teleconference for your group so  
4 that you can get together and talk about what your  
5 action plan is going to be.

6 If we could get that done by the end of  
7 next week, that would be good; we can then get that  
8 information back to the Panel.

9 DR. BARROS-BAILEY: Okay. Thank you.  
10 That helps.

11 Okay. So then moving on to the meeting  
12 that we have coming up. We have the April meeting  
13 in Atlanta -- I'm going to turn it over to you.

14 MS. TIDWELL-PETERS: Okay. We are  
15 scheduled to meet in Atlanta April 27, 28, 29. We  
16 are looking to do a full day on those three days.  
17 And we have just -- from the result of this  
18 conversation, we will go back and look at developing  
19 suggested presentations and presenters, possible  
20 visits to DDS to occur before that time.

21 We are talking about a possible  
22 presentation from a vocational expert. A case

1 demonstration, we may be able to set that up on site  
2 at the hotel, in addition to an E-cat demo. We may  
3 also want to decide whether -- and Mary will have an  
4 opportunity to talk with Sylvia, our project  
5 director -- whether we will have public comment at  
6 that meeting. We talked about having a presentation  
7 on the taxonomies. We will have reports from the  
8 subcommittee chairs at that meeting. We will have  
9 an action item update at that meeting.

10           It will be a quite full three days. It's  
11 exhausting going through it. That's what we plan  
12 for April.

13           We also have sent out asking you to check  
14 your calendars for a meeting to occur possibly the  
15 last three weeks of July; then, again, for the  
16 fourth meeting to occur the last three weeks of  
17 September. So if you have not sent those -- that  
18 information back to me, if you can do that by this  
19 Friday so that next Monday we can know what we're  
20 going to plan for the end of July, and for the end  
21 of September.

22           One other action item is to think about



1 scheduling for FY 010, which starts October 2009.  
2 We are compressing our four meetings. We wanted to  
3 get four meetings in this fiscal year, which is why  
4 these are coming at us so quickly. In FY10, we will  
5 stretch that out a bit.

6           And here is a question to the panel  
7 members. We would like to look at attempting to  
8 schedule them, for example, in the third week, the  
9 last month of the fiscal quarter on Monday, Tuesday,  
10 Wednesday. That way everyone can go back and look  
11 at their calendars.

12           For example, if we're looking at the  
13 fiscal year beginning in October, we will then look  
14 to have, perhaps, a meeting in November or early  
15 December, then -- pardon?

16           MS. KARMAN: Christmas Day.

17           MS. TIDWELL-PETERS: Christmas day, yes.

18           So we would look, for example, to have a  
19 meeting, perhaps -- it's difficult around the  
20 holidays, particularly around the last six weeks of  
21 the year. But if we would look at having a meeting  
22 in the third week in February; Monday, Tuesday,

1 Wednesday; the third week in May; Monday, Tuesday,  
2 Wednesday, would it help for you in your calendar if  
3 we were to --

4 PANELISTS: Yes.

5 MS. TIDWELL-PETERS: Okay. So then  
6 another action item, then, for me would be to sort  
7 of plot that out for us and get it to you, so you  
8 can start to look at your calendars for FY010.

9 DR. GIBSON: The last week of December, is  
10 that what we're hearing?

11 MS. TIDWELL-PETERS: Perhaps, the first  
12 week in December. Yes.

13 MR. WOODS: With regard to the Atlanta  
14 April meeting, so the idea is we will be coming in  
15 the afternoon or evening of the 26th?

16 MS. TIDWELL-PETERS: Yes.

17 MR. WOODS: And leaving on the -- will the  
18 departure be, then, after the meeting on the 29th?  
19 Just thinking in terms of --

20 MS. TIDWELL-PETERS: Right. Due to where  
21 we are, some people won't be able to get out that  
22 evening. If you can't get out that evening, you can

1 stay over.

2 MS. LECHNER: The meeting on the 29th will  
3 be a full day?

4 MS. TIDWELL-PETERS: That's correct.

5 MR. WOODS: I want to see how you get the  
6 boys in.

7 MS. RUTTLEDGE: Debra, this is Lynnae. I  
8 remember from the discussions over the last couple  
9 of days that we were thinking in terms of the July  
10 meeting potentially being in Denver. Have we made  
11 decisions about other locations?

12 MS. TIDWELL-PETERS: No, we haven't made  
13 decisions about other locations yet. We did solicit  
14 in the original Federal Register notice to the  
15 public their suggestions for sites across the United  
16 States. So we will have that information for you as  
17 well, the possible sites and the time periods, FY0.

18 MS. RUTTLEDGE: And for folks coming from  
19 the West Coast, sharing the experience of the time  
20 change is something everyone needs to experience in  
21 this process. So those of you who had the benefit  
22 of being on the east coast, having meetings that

1 start at 8:30, for Bob and I that's 5:30. I want  
2 you to have the same joy. And so we want you to  
3 come to Seattle and to San Francisco soon.

4 DR. BARROS-BAILEY: Are there any more  
5 action items? That's it. Okay.

6 MS. TIDWELL-PETERS: Before we adjourn  
7 for the day, we would like to invite back our  
8 Associate Commissioner of the Office of Program  
9 Development and Research, Richard Balkus. You met  
10 him on the first day of our meeting.

11 MR. BALKUS: I'm only going to keep you a  
12 couple more minutes. First of all, I would like to  
13 thank you. I would like to thank you for your  
14 willingness to serve on this Panel. I think we off  
15 to a terrific start.

16 Just a couple things that, I guess, I  
17 would like you to think about between today and the  
18 next meeting here. First of all, in terms of  
19 looking at the person side here and looking at the  
20 need to develop a common language between the person  
21 side here and the job side, that bridge. I think  
22 they're -- you know, the assumption here is that we

1 are going to be working with our current  
2 regulations, the current sequential evaluation  
3 process that we talked to you about.

4 I think that there are some clues here, as  
5 you move along here in terms of identifying that  
6 common language. Again, going back to even step two  
7 in the sequential evaluation process, how severe  
8 impairment is defined. What examples are given in  
9 terms of basic work activity. That can help you at  
10 least in terms of thinking about where do you start  
11 in terms of the cognitive impairments, mental  
12 impairments, and looking at the content model.

13 The other thing we didn't talk about that  
14 this -- that much, too much in terms of listing of  
15 impairment; but in the last decade, 15 years or so,  
16 some of the listing have moved more from a medical  
17 model to more of a medical functional model. So  
18 when you are looking at musculoskeletal impairments,  
19 that particular body system, and when you are  
20 looking at mental impairments, I think we need to be  
21 looking at how we define a criteria for meeting a  
22 listing in terms of functional requirements.

1 Because if we going to be expecting to see that  
2 information coming forward also from medical  
3 providers in the terms of adjudicating claims.

4           So these are some other things, clues that  
5 I think that you need to be thinking about in terms  
6 of the developing a common language here in building  
7 that bridge, and developing the person side here in  
8 terms of the content model.

9           The -- I was very pleased, I think, to  
10 hear this morning, at least, the desire here -- to  
11 figure out more what actually happens, as far as  
12 adjudicating a claim and the interest, in terms of  
13 for visiting DDSs. And we, of course, would have to  
14 work through our other components here in  
15 headquarters to arrange that for you.

16           But a couple times I heard, you know, the  
17 end user, the DDS examiner. And I can't help -- and  
18 part of this is because I have spent many years  
19 working at the hearings level. There are other end  
20 users here that we need to be thinking about. And  
21 that is the administrative law judge at the hearings  
22 level. The senior attorney at the hearings level.

1           And I think you need also, even though  
2     some of you have, certainly, appeared at hearings as  
3     a vocational expert, or you have represented  
4     claimants; but I think the rest of you do need to  
5     get probably also get a sense in terms of what  
6     happens at the hearings level in terms of the  
7     process. What evidence is presented to them? And  
8     how they approach looking at steps four and five in  
9     terms of the adjudication process.

10           I say that because if you look at our  
11    strategic plan, there is a whole initiative in terms  
12    of dealing with the hearings level, and making sure  
13    that we address the terrific backlog that is at the  
14    hearings level at that point. And also, to make  
15    sure that it doesn't happen again.

16           So that's a critical issue facing the  
17    Agency now. And so when you think about the end  
18    user, there is an end user out there, the DDS  
19    examiner; but there are end users out there  
20    throughout the appellate process that we need to  
21    keep mindful of.

22           The other -- actually, the comment this

1 morning -- and some of the same things I know I  
2 don't think about as much as Sylvia; but the -- some  
3 of the discussion here in term of the aggregation  
4 issue. And maybe it's because, you know, in my  
5 former life as being an adjudicator, I am also  
6 thinking more in terms of the DOT, and maybe not so  
7 much outside of the box here.

8           You have to think also of that aggregation  
9 issue, and at least facilitates, to some extent,  
10 taking administrative notice. There are operational  
11 issues that you need to think about when looking at  
12 that part of the equation here. And certainly, in  
13 terms of how you move forward.

14           I think that's all I had from my notes  
15 this morning. I appreciate the great start that you  
16 are off to. I like the way the last hour or so of  
17 the meeting has ended up in terms of outlining what  
18 you need to get done between now and the next  
19 meeting. You, certainly, seem to be on a good track  
20 here to meet, I think, the commissioner's  
21 expectation in terms of deliverables by the end of  
22 the fiscal year. Again, I appreciate your help.



1 Thank you.

2 DR. BARROS-BAILEY: Thank you. I  
3 appreciate it.

4 I thank the panel members for being here.  
5 It was great to finally join you today. And I think  
6 we have addressed everything that I saw on the  
7 agenda. So I would entertain a motion to adjourn.

8 DR. GIBSON: So moved.

9 DR. BARROS-BAILEY: I have several moves.  
10 I think Shanan said it first.

11 MR. HARDY: Second.

12 DR. BARROS-BAILEY: And Tom seconded the  
13 adjournment, so we are adjourned. Thank you.

14 (Whereupon, at 11:47 a.m., the meeting  
15 was adjourned.)

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CERTIFICATE OF REPORTER

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

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

SIGNED this 6th day of March, 2009.

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STELLA R. CHRISTIAN