

**Occupational Information Development Advisory Panel  
Inaugural Meeting**

Sheraton Crystal City Hotel  
Arlington, Virginia

February 23-25, 2009

This document contains the final and approved minutes of the Inaugural Meeting of the Occupational Information Development Advisory Panel (the “Panel”). This discretionary Panel, established under the Federal Advisory Committee Act of 1972, as amended (hereinafter referred to as “the FACA”), will report to the Commissioner of Social Security (“Commissioner”). The Panel will provide independent advice and recommendations on plans and activities to replace the Dictionary of Occupational Titles used in the Social Security Administration’s (SSA) disability determination process. The Panel will advise the agency on creating an occupational information system tailored specifically for SSA’s disability programs and adjudicative needs. The Panel will provide advice and recommendations related to SSA’s disability programs in the following areas: medical and vocational analysis of disability claims; occupational analysis, including definitions, rating, and capture of physical and mental/cognitive demands of work, and other occupational information critical to SSA disability programs; data collection; use of occupational information in SSA’s disability programs; and any other area(s) that would enable SSA to develop an occupational information system suited to its disability programs and improve the medical-vocational adjudication policies and processes.

At the opening of the Inaugural Meeting, Commissioner of Social Security Michael J. Astrue swore in the following members of the Panel:

Robert T. Fraser, Ph.D.  
Shanan Gwaltney-Gibson, Ph.D.  
Thomas A. Hardy, J. D.  
Sylvia E. Karman  
Deborah E. Lechner  
Lynnae M. Ruttledge  
David J. Schretlen, Ph.D.  
Nancy G. Shor, J.D.  
Mark A. Wilson, Ph.D.  
James F. Woods

Following the swearing-in ceremony, Debra Tidwell-Peters, the Designated Federal Officer, called the meeting to order and welcomed Commissioner Astrue for his opening remarks.

Commissioner Astrue began his comments by sharing with the Panel one of the four strategic goals of the agency: to significantly improve the speed and quality of the disability process over the next five years. He noted the complexity of our mission, budgetary constraints, and the fact that approximately three million Americans will go through this process in the coming year. While the agency is still struggling, he noted that although we have made significant progress in disability claim processing, we have not moved to a substantially electronic system. Despite these improvements, there remain significant challenges and complexities.

The Commissioner cited some of the agencies recent improvements as: creating a more flexible platform so that we can adapt more quickly to the changing technological environment; the decrease in processing time gained by flagging new cases as either presumptively allowable or very close to presumptively allowable; a continued focus on reducing the case backlog; improvement and updating of the medical listings (including the move to the goal of an update schedule every five years); and the use of electronic medical records. As a result of these improvements, we have made improvement on the medical side.

Commissioner Astrue noted however that there remain much needed improvements on the vocational side. The agency continues to use the outdated Dictionary of Occupational Titles (DOT), a tool never designed for our specific needs. He stressed the importance of the task before the agency—to create a disability determination system, using the best technology, up-to-date medical information, and vocational administration.

At the conclusion of Commissioner Astrue’s remarks, the presentation portion of the meeting began. During the Inaugural Meeting, an important goal was to provide Panel members with an orientation that would bring them up-to-speed with the Agency’s organization, activities, projects and efforts underway and to familiarize them with the use of the DOT in the agency’s disability determination process.

During Day One of the Inaugural Meeting the Panel witnessed the following presentations:

***Presentation: Overview of the Occupational Information Development Project***

**Richard Balkus, Associate Commissioner, Office of Program Development and Research, Social Security Administration**

Associate Commissioner Balkus described updating occupational data as a long-recognized need for our Social Security Disability Insurance program and our Supplemental Security Income Program and the goal of developing the parameters for the content model for the Occupational Information System. He reiterated the expectation that by the end of September, the Panel would provide direction in terms of how we approach the development of a classification system for a new occupational information system designed specifically for use in SSA’s disability programs.

***Presentation: Statutory Significance of the Use of Occupational Information in SSA's Disability Programs***

**Jeffery Blair, Acting Deputy Associate Counsel for Program Law, Office of General Counsel, Social Security Administration**

Attorney Jeffrey Blair provided background information to the Panel on how SSA's disability programs evolved through legislation, statutes, regulations and court challenges.

***Presentation: SSA's Challenge: The Dictionary of Occupational Titles***

**Sylvia Karman, Panel Member and Project Director, Occupational Information Development Project, Office of Program Development, Social Security Administration**

Ms. Karman's presentation covered SSA's definition of disability and how this definition necessitates the use of occupational information in the disability determination process. The presentation also explained how SSA policy compels the use of the DOT.

**Introduction of Panel Members**

After a break, the meeting continued with each new Panel member introducing themselves to each other and the audience by providing biographical information and comments on the presentations heard. Detailed biographical information is contained in Attachment A to this document.

***Presentation: Sequential Evaluation Process for Assessing Disability, Part I***

**Tom Johns, Branch Chief, Disability Quality Branch, Dallas Office of Quality Performance**

Mr. Johns reviewed SSA's sequential evaluation process for assessing disability. The sequential evaluation process is a series of five steps used to determine whether a claimant is disabled. The first step is determining whether the claimant is engaging in substantial gainful activity (SGA). Step two asks whether or not the claimant's condition is severe. Step three asks whether the claimant meets or equals the listings. Step four asks if the claimant can perform their past relevant work. Step five asks if the claimant may perform other work in the national economy.

Discussion centered on several topics covered in the presentation. Panel members wanted clarification of issues regarding the development and adequacy of mental limitation categories on the mental residual functional capacity (MRFC) form; consideration of accommodations used in the workplace; the adequacy of the DOT in current adjudicatory practices; and the need for SSA to collect occupational data for SSA's current claimant population for purposes of aggregation of jobs in a new system.

*Presentation: Sequential Evaluation Process for Assessing Disability, Part II*

**Tom Johns, Branch Chief, Disability Quality Branch, Dallas Office of Quality Performance**

In part two of his presentation, Mr. Johns described how the DDS adjudicator obtains the claimant's medical records and activities of daily living forms. After review, a medical consultant at the DDS rates the claimant's limitations on the RFC. In some states, the adjudicator may complete the RFC with Medical Consultant assistance. The RFC contains a narrative description and classifications for specific exertional limitations. Mr. Johns explained how on mental claims an MRFC is completed that details degrees of limitations for specific cognitive and emotional activities, and includes a narrative from the DDS psychiatric consultant. This information is compared to the claimant's description of their past work. If the claimant can return to past work, that person is denied, if not, then the DOT is used to identify other jobs that person could perform. In the mental RFC, most of the consideration is given to the psychologist's narrative; however, the limitation categories are given more weight on the physical RFC. The RFC is used in conjunction with the grids, or medical vocational guidelines. The grids are organized by exertional level, categorized by age, educational level, and skill level. Depending on the classification for each category, the grids denote whether a claimant is found disabled or not disabled. In addition to the grids, there are the special medical vocational profiles which consist of a combination of impairment severity, age, education, and skill level classifications that direct a finding of disabled base on an inability to perform other work. If any one of SSA's findings of fact does not coincide with a specific vocational rule, the claimant is considered to be within the framework of the vocational rule.

Panel discussion followed concerning the need to collect data in order to pair down the number of occupations or determine what the ideal number should be. It is critical to identify a preliminary working set of occupations. The development of the content model is the primary charge, and classification of the job system is secondary. Consideration should be given to finding a middle ground between a micro approach that can become unwieldy and a holistic approach which is too broad to make valid determinations.

Associate Commissioner Richard Balkus informed the Panel that SSA will undertake a research project of a national sample using electronic folders to examine cases decided at the initial and hearings levels. SSA will capture the DOT title and identify how that job was identified by the applicant. SSA will also evaluate the RFC and MRFC process used in the decision.

***Presentation: Disability Determination Services and Their Workload***

**John Owen, Deputy Director, Division of Disability Determination Services  
Operation Support**

In his presentation, John Owen explained the various levels of adjudication. He summarized how a claim is processed at the initial level--from intake at the Field Office to the final determination. He explained the structure of the state DDSs and their relationship to the Federal and State governments in SSA's disability programs, introduced the Continuing Disability Review Process and presented statistics regarding workloads at all adjudication levels. Staffing of the state DDS's was broken down, and he gave some detail about the qualifications of disability examiners and the problems states have with staff attrition. Mr. Owen discussed the training provided for new disability examiners and explained the single decision maker pilot program. Other challenges facing the state DDSs were addressed.

Panel members asked questions about the training requirements for vocational specialists and the average caseload nationally for disability examiners (DE). Specific questions were asked regarding the attrition rates and what was the average level of experience for people leaving the state DDSs. There was some discussion regarding the training of DEs once a new occupational information system is rolled out. Mr. Owen explained that although teaching methods vary from state to state, the core material now taught is uniform throughout the nation.

The Panel also questioned Mr. Owen on what exactly were the shortcomings with the DOT (other than it being outdated), whether SSA had any procedure for disseminating information if DOT job descriptions were found to be outmoded or inaccurate, and the software currently used to perform a transfer of skills analysis.

***Presentation: Utilizing Vocational Expert Testimony at the Hearing Level***

**David G. Hatfield, Hearing Office Chief Administrative Law Judge, Office of the  
Chief Administrative Law Judge**

Judge Hatfield began by explaining that a hearing is the third step in SSA's disability administrative review process and that at the hearing level, judges primarily view cases that are steps 4 and 5 of sequential evaluation so occupational information is crucially important. He explained that an Administrative Law Judge (ALJ) is a judicial officer in the executive branch, and he makes findings of fact in a decision – he does not make law. Explanations are given about how a hearing is requested and about the process of pre-hearing review and the basic hearing procedures. His presentation addressed the use of expert testimony in the five-step sequential evaluation process, and when this testimony is required at an ALJ hearing. Particular detail was given about vocational experts—their selection, when they are useful, and how they are questioned. Judge Hatfield explained that hearings are de novo – the ALJ looks at the case anew and does not judge whether the DDS made the correct determination.

***Presentation: The Appeals Council Process***

**A. George Lowe, Administrative Appeals Judge, Office of Appellate Operations**

Judge Lowe presented information about the Appeals Council (AC), and described the three levels of the appeals system. He explained the role of the Office of Appellate Operations and gave insight into the factors that might cause the AC to review a case. He gave AC workloads figures for FY 2008. The presentation also explained the AC's business process and defined its actions. Some of the vocational issues facing the AC were listed. Information was given about how an individual dissatisfied with the administrative review process can file a complaint in US District Court.

***Presentation: SSA's Prior Work to Address DOT Concerns***

**Rob Pfaff, Social Insurance Specialist, Office of Program Development and Research, Social Security Administration**

Rob Pfaff's presentation covered the approaches and initiatives taken by SSA to examine the O\*Net and other methodologies to evaluate potential utility in SSA's disability program that would lead to a reduction in its dependency on the DOT. These initiatives range from research projects to establish a functional baseline to studies evaluating the use of vocational expertise. These approaches were unsuccessful in identifying a methodology for replacing or minimizing the use of the DOT. SSA has also evaluated O\*Net and found its aggregation of job titles was too high for SSA's needs and additionally, the ratings and descriptors for work and worker requirements are not tied to observable measures of human function.

***Presentation: SSA's Ideal Occupational Information System: The Legal, Program and Data Requirements***

**Deborah Harkin, Social Insurance Specialist, Office of Program Development and Research, Social Security Administration**

Debbie Harkin outlined three requirements for the new occupational information system: it must fulfill the guidelines established by the definition of disability in the Social Security Act; it must reflect the national existence and incidence of work; and finally, the Occupational Information System has to be legally defensible. SSA needs the new system to define what the core tasks are for work and the requirements needed for work. Observable measures are also needed for work demands and must be validated. Cognitive and mental demands of work are also required since this information is not currently available in the DOT. Deconstructed measures will make it easier to associate demand of work with the claimant's residual functional capacity. Data collection methods must ensure reliable, accurate, and comprehensive results.

*Presentation: SSA's Plans to Develop Occupational Information*

**Sylvia Karman, Panel Member and Project Director, Occupational Information Development Project, Office of Program Development, Social Security Administration**

Sylvia Karman discussed short term and long term plans for replacing the DOT. The short term efforts consist of two projects--one for a contract that involves a private sector DOT formatted occupational software and a second contract for an independent evaluation of the software product to determine if it can be used in SSA's disability program. The long-term project involves developing an integrated Occupational Information System. "System," really means a classification. This will include an ongoing process to update occupational information and keep SSA's policy current. SSA will use an integrated approach which means it will not rely on just one approach in data collection or one approach in terms of measurement. SSA will use outreach with the Occupation Information System Development (OISD) workgroup; private sector professional associations that are stakeholders; and the OIDAP FACA panel. Plans for the long-term include development of a content model and the initial classification of job demands. SSA will also test the data collection instruments used in the new system. SSA will also conduct a study to evaluate occupations that SSA claimants are currently performing. SSA will then formulate policy to incorporate the new system into SSA's processes.

Debra Tidwell-Peters thanked the Occupational Information Development workgroup and the OIDAP Panel and asked the panel to provide additional closing thoughts. Members expressed a desire to obtain DDS input for the kinds of problems and deficits in the information currently used. It was also suggested that the Departments of Labor and Commerce be informed regarding this process.

On the final day of the Inaugural Meeting, Debra Tidwell-Peters, the Designated Federal Officer, called the meeting to order and introduced Richard Balkus, Associate Commissioner of the Office of Program Development and Research who administered the oath of office to Dr. Mary Barros-Bailey, as a member of the Panel and Interim Panel Chair.

The Panel held its first administrative meeting which included a review of required forms and documents that will require a full Panel vote at the next Quarterly Meeting. The Panel reviewed a list of action items collected throughout the meeting—a list of items identified for immediate action is included in the document entitled the Social Security Administration Update to the Occupational Information Development Advisory Panel contained in the miscellaneous document section of the handout material.

Ms. Tidwell-Peters reminded the Panel of the Commissioner's two-fold charge to be accomplished by the end of FY 2009: to have a recommendation regarding the type of occupational information SSA should collect, and to have a recommendation regarding the classification system for the occupational data.

## **Panel Discussion—Content Model**

Panel Members discussed their individual concepts of what a Content Model is. Dr. Shanan Gibson stated her concept would include those characteristics of occupations which need to be identified in order for us to make disability determinations. These characteristics include both the mental and physical characteristics of jobs. The degree of abstraction will need to be decided – somewhere in between the micro task level and the holistic level of O\*NET. Dr. Mark Wilson added that an important task on the person side is to flush out the taxonomic structure in terms of cognitive and perceptual activity.

As discussion continued, Sylvia Karman stated that while developing the content model, panel members should be mindful of how measurable and observable the elements are. The Panel is not expected, however, to develop the instrument while working on the content model. Dr. Wilson brought up the issue of Specific Vocational Preparation (SVP) and said consideration would need to be given to how this area would be addressed. Ms. Karman added that skill level is very important to SSA, and the research will need to determine whether there is such a thing as “unskilled” work.

Dr. Gibson asked whether current Residual Functional Capacities (RFC) would drive the content model, or can the RFC’s be changed. Ms. Karman responded that since we are hoping to tailor the Occupational Information System (OIS) for disability evaluation, SSA should use the Panel’s recommendations to drive the development of a new RFC. Ms. Karman reminded the panel that the OIS is limited by the following factors: what we can expect to receive from a claimant, the medical evidence we can obtain, and the functional evidence we can get. Ms. Lechner asked to what extent SSA will be capable of measuring function – will SSA administer cognitive or physical functional tests or will inference continue to be drawn from medical evidence?

Jim Woods suggested talking to the people with the Department of Labor in North Carolina who worked on O\*NET and also researched content models. Drs. Gibson and Wilson agreed that a good approach to developing the content model would be to identify and study existing taxonomies and see if any of these match up with the types of job content that would be useful in making disability determinations.

After much discussion, the Panel identified six broad categories for the content model that could apply to the work and person side: Physical; Cognitive; Behavioral; Environmental/Contextual/Work Site; Perceptual/Sensory; and, Skills.

Ms. Karman added that it is important for SSA’s disability process to know the literacy requirements of jobs. Dr. Wilson stated that he hoped we could make data available publicly to develop consortium with researchers as the deliberations are made over the empirical taxonomies.



## Panel Decisions and Actions:

The Panel agreed to work on different issues related to the Content Model by dividing into the following four subcommittees:

- 1) **Cognitive/Behavioral:** *Chair:* Dr. David Schretlen. Purpose: Bring together current research in cognitive taxonomies of human functioning. Members: Dr. Robert Fraser
- 2) **Taxonomy of Generalized Work Activities:** *Chair:* Dr. Mark Wilson. Purpose: Identify and study current occupational taxonomies to see what is appropriate for disability determination. Members: Dr. Shanan Gibson, James Woods.

By next meeting the Taxonomy Subcommittee agreed to:

- Compile all relevant taxonomies of generalized work activities and a list of categories within each;
- Create a job analysis resource list for individuals wanting to learn more about job analysis.

- 3) **Physical Residual Functional Capability (RFC):** *Chair:* Physical Demands: Deborah Lechner. Purpose: Begin to identify the physical demands of work. Members: Deborah Lechner, Dr. Mary Barros-Bailey, Sylvia Karman
- 4) **DDS Visits:** *Chair:* Thomas Hardy. Purpose: Organize DDS visits for panel members and pool ideas following the visits. Members: Deborah Lechner, Lynnae Ruttledge.

Associate Commissioner Balkus made closing remarks. He asked the Panel to remember that they will have to work within certain existing regulations, such as the sequential evaluation process. He also reminded the Panel that they can draw some inspiration for the content model from how severe impairments are defined at step two, for example how basic work activity is defined. Mr. Balkus also reminded the panel that DDS examiners are not the only end-users of occupational information at SSA; the Panel should keep in mind that there are other users throughout the appellate process such as administrative law judges and senior attorneys.

Panel Interim Chair Dr. Mary Barros-Bailey adjourned the Inaugural Meeting approximately 11:47 a.m.

For additional information on the Occupational Information Development Advisory Panel please visit the website at [www.ssa.gov/oidap](http://www.ssa.gov/oidap) or contact the Panel staff by email to: [oidap@ssa.gov](mailto:oidap@ssa.gov).

## ATTACHMENT A

### Occupational Information Development Advisory Panel

#### *Member Biographical Information*

##### **Gunnar B. J. Andersson, M.D.**

Dr. Andersson is the The Ronald L. DeWald, M.D. Professor and Chairman Emeritus of the Department of Orthopedic Surgery at Rush University Medical Center, Chicago, Illinois. Dr. Andersson was Chairman of the Department of Orthopedic Surgery from 1995 to 2008. During his tenure as Chairman he has also been the President of the Medical Staff, the Vice Dean for Surgical Sciences and Services and the Senior Vice President of Medical Affairs each for two year periods. Dr. Andersson received his M.D. from the University of Göteborg, Sweden, did his residency at Sahlgren University Hospital and also obtained a Ph.D. in medical science at the University of Göteborg in 1974. After a fellowship at the London Hospital he joined the faculty at the University of Göteborg for ten years.

In 1985 he moved to the United States and Rush University Medical Center. His clinical area of interest is spine while his research interests are disc degeneration, epidemiology and occupational biomechanics. Dr. Andersson is a past President of the Orthopaedic Research Society, the International Society for the Study of the Lumbar Spine and the American Academy of Disability Evaluating Physicians. He has been a council member of the National Institutes of Arthritis and Musculoskeletal and Skin Diseases at NIH, Chairman of the Research Committee at the American Academy of Orthopaedic Surgeons and a member of three Institute of Medicine committees. He is a member of 15 Editorial Boards, a Deputy Editor for Spine, Editor-in-Chief of Contemporary Spine Surgery and an Associate Editor of Clinical Biomechanics. He is the author of over 260 original publications, over 150 books and book chapters and 430 abstracts.

##### **Mary Barros-Bailey, Ph.D.**

Mary Barros-Bailey, PhD, CRC, NCC is a bilingual rehabilitation counselor, vocational expert, and life care planner in Boise, Idaho. She is the immediate past Chair (2007-2008) of the Commission on Rehabilitation Counselor Certification (CRCC) and served as the Ethics Committee Chair from 2005-2007. Mary was one of the founding members of the Inter-organizational O\*NET Task Force (IOTF) that in the early 2000s collaborated with the US Social Security Administration and the US Department of Labor on the use of occupational data within the disability context. She is a reviewer or on the Editorial Boards of several peer-review journals such as the *Journal of Counseling & Development* (American Counseling Association), the *Journal of Forensic Vocational Analysis* (American Board of Vocational Experts), and the *Journal of Mixed Methods Research* (SAGE Publications). Mary has a doctorate is in Counseling with a cognate in Rehabilitation Counseling from the University of Idaho. Her research and presentation interests include professional issues in rehabilitation counseling (ethics, methodological, aging, multicultural, and international). She has presented and published nationally and internationally.

**Robert T. Fraser, Ph.D.**

Robert T. Fraser, Ph.D. is a professor in the University of Washington's Department of Rehabilitation Medicine, joint with the Departments of Neurological Surgery and Neurology and consultant with Associates in Rehabilitation and Neuropsychology. He is an active counseling and rehabilitation psychologist, a certified rehabilitation counselor and a certified life care planner who directs Neurological Vocational Services within Rehabilitation Medicine. Within neurological rehabilitation, he has specialized in epilepsy, brain injury, and multiple sclerosis.

Dr. Fraser is author or co-author of more than one hundred publications and co-editor on four texts to include Traumatic Brain Injury Rehabilitation (CRC Press, 1999), Multiple Sclerosis Workbook (New Harbinger, 2006), and Comprehensive Care in Epilepsy (John Libbey, 2001). He has been awarded numerous Federal grants by the Department of Education (NIDRR and RSA) - four of which have been specific to traumatic brain injury rehabilitation, and, more recently, in epilepsy self-management by the Center for Disease Control (CDC). He was awarded two World Rehabilitation Fund fellowships to review, respectively, the post-acute traumatic brain injury programs in Israel and epilepsy rehabilitation advances in Scandinavia and Holland. He lectures nationally on TBI rehabilitation. Research emphases have included evaluation of innovative psychosocial rehabilitation strategies and prediction of vocational rehabilitation outcome across different neurological disabilities. He is the recipient of two American Rehabilitation Counseling Association Research Awards, and an Epilepsy Foundation of America Career Achievement Award. Dr. Fraser is a past-president of Rehabilitation Psychology, Div. 22 of the American Psychological Association and a Fellow in the Division, a former Board member of the Epilepsy Foundation of America (EFA), a current board member of the Epilepsy Foundation Northwest, and was recently elected to the Board of Governors for the International Consortium of Multiple Sclerosis Centers.

Dr. Fraser has received master's degrees in rehabilitation counseling (University of Southern California) and public administration (Seattle University). His doctorate is in rehabilitation psychology from the University of Wisconsin-Madison, with a dissertation focused on the use of task analysis in the national classification and utilization of state agency vocational rehabilitation personnel.

**Shanan Gwaltney Gibson, Ph.D.**

Professor Gibson's expertise is in issues related to human resources management & organizational behavior in organizations. Her research includes more than 30 published conference proceedings and 16 peer-reviewed journal articles on topics relevant to human resources and organizational development including job analysis, technology acceptance in organizations, and entrepreneurship. Her research can be seen in the Journal of Small Business Strategy, Business Education Forum, and Management Research News, among others.

Professor Gibson is an Assistant Professor of Management at East Carolina University and a member of the College of Business since 2003. Professor Gibson has extensive experience teaching issues related to occupational analysis; in addition to currently teaching graduate level Human Resources, she previously spent two years teaching Industrial and Organizational Psychology at ECU, as well as courses at Radford University and Texas A&M Corpus Christi. Professor Gibson currently acts as a consultant to State Farm Insurance on issues related to human resources management and leadership development. She is a member of The Academy of Management, the Society for the Advancement of Management, the Society for Industrial &

Organizational Psychology, the Southeast Decision Sciences Institute, and the Southeast Institute for Operations Research and the Management Sciences.

Dr. Gibson graduated with a B.A. in Liberal Arts (magna cum laude) from Armstrong Atlantic State University and a M.S. in Industrial and Organizational Psychology and a Ph.D. in Industrial and Organizational Psychology from Virginia Polytechnic Institute & State University

### **Thomas A. Hardy, J.D.**

Thomas Hardy is an attorney in Private Practice concentrating his work in Social Security and Long Term Disability Appeals.

Previously, Hardy worked for a long term disability insurance carrier as the nationwide Manager of Vocational Rehabilitation Services; subsequently he took on Management of Medical Services and later also assumed the Supervision of Local Counsel. He was previously employed in the private sector as Vocational Disability Counselor. This combination of Medical, Vocational, and Legal knowledge made him a logical choice for a position on the IOTF (Inter Organizational Task Force) where he served for five years as a representative of the Private Insurance Industry to the Social Security Administration and Department of Labor.

Hardy earned his Juris Doctor from Rutgers University, his Masters Degree from the University of North Texas and Bachelors Degree from St. Charles Borromeo College. He is a member of the Pennsylvania and New Jersey Bars. Hardy also holds professional certifications from the national Board for Certified Counselors (NCC), Commission on Rehabilitation Counselor Certification (CRC) and Commission of Insurance Rehabilitation Specialists (CIRS). He resides in Philadelphia

### **Sylvia E. Karman**

As Director for Social Security Administration's (SSA's) Occupational Information Development Project in the Office of Program Development and Research, Sylvia Karman, oversees the research and development of occupational information tailored to SSA's disability programs. She directs the investigations and developmental work to replace the Dictionary of Occupational Titles, as well as studies to inform disability policy development. She also chairs the SSA Occupational Information System Development Workgroup. Ms. Karman serves as an expert for SSA executive management and for numerous private and public sector entities on medical-vocational assessment and occupational information issues critical to disability evaluation. As the former Chief of the Vocational Policy Branch in SSA's Office of Disability Programs and, before that, the lead senior policy analyst and project manager for occupational information analysis and policy issues related to SSA's use of the Dictionary, she has long held a leadership role for the agency in these subject areas.

Ms. Karman began her career with SSA in 1979 as a college intern. After graduating in 1982 with a BA degree from Towson University in Maryland, her work involved policy and legislative development and program evaluation for the Supplemental Security Income program under title XVI and for the agency's disability programs under both titles II and XVI. Ms. Karman has presented and published papers in the areas of SSA's use of the Dictionary of Occupational Titles for disability adjudication, medical-vocational assessment, and the role of vocational factors and occupational information in disability evaluation, including transferable skills analysis. She is a frequent speaker at conferences and seminars throughout the US and Canada.

### **Deborah E. Lechner**

Deborah graduated from the University of North Carolina at Chapel Hill in 1975 with a BS degree in physical therapy. She later received her post-professional masters from the Massachusetts General Institute in Boston. Lechner is President and founder of ErgoScience, Inc and Research Associate Professor with the Department of Occupational and Environmental Medicine at the University of Alabama at Birmingham (UAB).

From 1988 to 1993, she developed and validated a state of the art FCE, the Physical Work Performance Evaluation (PWPE) as part of her research responsibilities at UAB. When the results of the research were positive, the University of Alabama at Birmingham Research Foundation encouraged her to market the evaluation. ErgoScience™ was formed to meet this need. Lechner brings to the FCE process a solid grounding in biomechanics and kinesiology from her experience in a computerized gait analysis and teaching kinesiology. Another powerful influence on her approach to FCE was her graduate training at the Mass General Institute. The program emphasized standardization, objectivity, reliability, and validity in clinical measurement. In the PWPE, as with other ErgoScience™ products and courses, she combines her research background with 25+ years of clinical experience. She has recently developed a job demands analysis process and has assisted her faculty in developing coursework in industrial rehabilitation, AMA impairment ratings, and marketing rehabilitation services. Under her leadership, ErgoScience™ will continue to combine both a clinical and research focus, as well as offering state-of-the-art continuing education.

### **Lynnae M. Ruttledge**

As a person born with a disability, Lynnae was served by the Michigan Vocational Rehabilitation program and assisted in obtaining her teaching credentials at the beginning of her career. Her extensive work history in the disability field has focused on working in the public and non-profit sectors in Michigan, Oregon and Washington. She has served in policy development, program management and key leadership positions in independent living, vocational rehabilitation, workforce development and business leadership networks.

Lynnae moved to the state of Washington in October 2005 to serve as the Director of the Washington Division of Vocational Rehabilitation. By 2007, the Division was recognized by the Governor with an outstanding management award and eliminated its 13,000+ waiting list by early 2008. Lynnae continues to lead the Division as it expands its capacity and partnerships to assure that more individuals with significant disabilities become successfully employed.

As a Governor's appointee, Lynnae serves as an ex-officio member of both the State Rehabilitation Council and the State Independent Living Council. She represents the Department of Social and Health Services on the state Workforce Investment Board.

As a longtime volunteer and disability rights expert, Lynnae has been affiliated with Mobility International USA since 1988 and has traveled to China, Russia, New Zealand/Australia, Germany, Japan, Zimbabwe, Uzbekistan, Peru, Qatar, Tunisia and Mali.

### **David J. Schretlen, Ph.D.**

David J. Schretlen is an Associate Professor of Psychiatry and Behavioral Sciences, as well as an Associate Professor of Radiology at the Johns Hopkins University School of Medicine. He is board-certified in clinical neuropsychology, and works at the Johns Hopkins Hospital, where he sees patients, teaches, and conducts research.

Dr. Schretlen completed his doctorate in clinical psychology at the University of Arizona in 1986, an internship at McLean Hospital, Harvard Medical School, and a post-doctoral residency in neuropsychology and rehabilitation at the UCLA Neuropsychiatric Institute. While at UCLA, Dr. Schretlen was awarded a Mary E. Switzer fellowship by the National Institute of Disability and Rehabilitation Research.

Dr. Schretlen has served as a grant reviewer for the National Institutes of Health and the Veterans Administration Medical Center. He serves on the editorial boards of several scientific journals. A prolific researcher, he has authored over 175 articles, monographs, book chapters, and abstracts. His research interests include the use of quantitative brain imaging to investigate cognitive and emotional aspects of human behavior. He has received federal and private research funding to study determinants of work disability in traumatic brain injury and bipolar disorder. He currently is analyzing predictors of functional disability in schizophrenia and bipolar disorder. Related to this is another program of research in which Dr. Schretlen is investigating strategies to increase the diagnostic sensitivity and specificity of neurocognitive measures for persons of diverse socioeconomic background.

In addition to research and teaching, Dr. Schretlen is actively engaged in clinical work that primarily involves neuropsychological assessment. He consults to physicians about treatment planning and attorneys about matters involving such matters as vocational aptitude and work disability resulting from brain injuries.

### **Nancy G. Shor, J.D.**

Nancy G. Shor is Executive Director of NOSSCR (National Organization of Social Security Claimants' Representatives) located in Englewood Cliffs, New Jersey. She edits NOSSCR's monthly publication, *Social Security Forum*, and coordinates NOSSCR's research and advocacy efforts on behalf of Social Security and SSI disability claimants. She is a frequent speaker at CLE programs across the country and has testified before Congressional committees on Social Security issues on numerous occasions. She is the author of two chapters of *Social Security Practice Guide*, published by Lexis Nexis. Ms. Shor is a member of the National Academy of Social Insurance.

Ms. Shor is a past Commissioner for the American Bar Association Commission on Law and Aging. In 2009, she was appointed to Social Security Administration's Occupational Information Development Advisory Panel. She graduated from Boston University School of Law in 1976 and Wellesley College in 1973. She is admitted to practice in Massachusetts and the District of Columbia. Ms. Shor was in private practice for two years before becoming the first Executive Director of NOSSCR in 1979.

### **Mark A. Wilson, Ph.D.**

Dr. Mark A. Wilson, Associate Professor of Psychology, NC State University, joined the faculty in 1992. He received a B.A. in Psychology from Wartburg College (1975), an M.A. in Experimental Psychology from the University of Missouri-Kansas City (1978), and a Ph.D. in Industrial/ Organizational Psychology from Ohio State University (1983).

While completing the Ph.D., he served as Project Coordinator, Technical Director, and Senior Research Associate for Organizational Research and Development Inc. on a comprehensive human-resource research project involving human-resource planning, job analysis, selection (managerial assessment centers), performance appraisal, and compensation for a market-leading insurance company. The experience drastically altered his view of the field and his research interests. It was while working on the project that he developed his interest in the integration of human-resource systems, comprehensive job analysis, his dedication to the scientist-practitioner model and the problems of practitioners, and his love for fieldwork.

He has always been interested in work measurement issues, models of human job performance in organizations, and research methods. He has consulted and conducted research extensively with numerous large organizations in both the private and public sectors. He has taught graduate and undergraduate management courses as an Assistant Professor at both Texas Tech University (1981-1985) and Iowa State University of Science and Technology (1985-1992). In 1999, he was made an honorary member of the United States Army Special Forces. In 2006, he was appointed editor of *Ergometrika* (The Journal of Work Measurement Research).

### **James F. Woods**

Jim Woods consults on economic and labor market information issues, systems, and policy after retiring in 2006 with 34 years of Federal service. In 2006-2007 Jim worked with the Upjohn Institute on the design of a model labor market information system for the Canadian government. Most recently, Mr. Woods developed a nationwide training program for the American Association of Community Colleges to use college performance measurement and labor market information to better integrate community colleges into economic development initiatives.

From 2005-2006, Jim directed strategic planning and program performance review for the Employment and Training Administration of the U.S. Department of Labor. In 1999-2004, Mr. Woods led development of the O\*NET system that replaced the Dictionary of Occupational Titles (DOT). During this period Jim also directed evaluation studies of the Department of Labor's employment and training programs.

Jim was with the National Occupational Information Coordinating Committee for 20 years, serving in 1987-1999 as the Director of Occupational Information Systems guiding development of computerized occupational information systems in all states to support employment and training program planning and career planning and guidance. Accomplishments included developing computerized systems to access labor market information, standardizing databases structures to facilitate data sharing among states, automating analytical tools, and preparing several technical manuals and training programs related to occupational information.

Earlier in his career at USDOL, Jim developed methods to estimate low-income populations and designed the Labor Market Projections Model, housed at Lawrence Berkley Laboratory. These systems supported national and state planning and allocation of Federal funds for employment and training programs.