

## FY 2014 Occupational Requirements Survey Scope of Work

### Background

This document describes the FY 2014 scope of the work of the agreement between the Social Security Administration (SSA) and the Department of Labor (DOL), Bureau of Labor Statistics (BLS) to support the development of occupational data for use in the SSA's disability programs.

The BLS will work in conjunction with the SSA to design and implement a series of tests to assess the feasibility of using the National Compensation Survey (NCS) platform as a means to accurately and reliably capture data that are relevant to the SSA's disability program purposes. To ensure that the data the BLS collects serve the SSA's disability program purposes, these tests will include, but are not limited to, the following data elements:

- 1) An indicator of "time to proficiency," defined as the amount of time required by a typical worker to learn the techniques, acquire the information, and develop the facility needed for average job performance, comparable to the Specific Vocational Preparation (SVP) used in the Dictionary of Occupational Titles (DOT).
- 2) Physical Demand characteristics/factors of occupations measured in such a way to support SSA disability determination needs, comparable to measures in Appendix C of the Selected Characteristics of Occupations (SCO).
- 3) Environmental Conditions measured in such a way to support SSA disability determination needs, comparable to measures in Appendix D of the SCO.
- 4) Data elements that describe the mental and cognitive demands of work.
- 5) Occupational Task lists as identified in the Employment and Training Administration's (ETA's) O\*Net Program in order to validate the key tasks common across establishments and identify other tasks commonly performed.

### Scope of Work

Using the 8-digit Standard Occupational Classification (O\*NET-SOC) system, the BLS will collect data from a set of private and State and local government establishments that are within scope of the NCS to meet SSA needs in terms of the type of data elements collected and the measures associated with these elements. The data collected during these tests will include SSA-specific data elements and selected NCS data elements. Depending on the results of the FY 2014 testing and research, the BLS and SSA mutually will determine production and program development plans for FY 2015.

In FY 2014, the BLS will perform work to meet the following objectives:

- Collect data to continue evaluating whether NCS can produce estimates of sufficient quantity and quality to meet the needs of the SSA;
- Continue to evaluate survey design options and develop the processes, protocols, aids, and collection procedures to meet SSA data needs; and
- Provide documentation to the SSA summarizing the work performed by the BLS, conclusions drawn, and recommendations for future data collection, testing, and research.

In order to accomplish these objectives, the BLS will conduct various feasibility tests, a full pre-production test, and complete research as described below.

### Feasibility Testing

In FY 2014, the BLS will test the collection of mental-cognitive data elements and work to further study and resolve issues discovered during previous testing. Each of the new tests will include procedures and

protocol development, training, data collection, evaluation, and debriefing activities. The FY 2014 feasibility tests will include the following:

- Design, develop, and conduct tests for the new mental-cognitive data elements, and evaluate the use of occupational task lists as developed by ETA's O\*NET program during data collection. The initial test will take place within the Washington, DC metropolitan area. The BLS will consult with the SSA, and will modify its approach, if necessary, prior to starting a second phase of testing. The BLS will share the results of the second phase of testing with the SSA to determine if further testing is needed to capture the cognitive and mental demands of work in a way that meets SSA program needs;
- Design, develop, and conduct a test to determine how best to collect occupational requirements data elements from America's largest firms and State governments;
- Design, develop, and conduct a test to determine how best to collect occupational requirements data elements and NCS data elements from the same establishment;
- Design, develop, and conduct a test to determine how best to collect occupational requirements data elements when a personal visit is not optimal due to respondent resistance, collection costs, or other factors;
- Design, develop, and conduct a test to refine the methods to develop more efficient approaches for data collection as identified during FY 2013 testing; and
- Capture and evaluate changes in data coding as a result of observing the work environment and/or sampled occupation.

#### Pre-Production Testing

At the conclusion of Feasibility Testing and assessment of the results, the BLS will conduct a nation-wide test to evaluate all aspects of the survey in a possible production environment. Data collection and capture are expected to run for two or more quarters and will conclude in FY 2015. The data capture portion of this test will be followed by a full evaluation of data, processes, survey design, and other program elements. The costs associated with the FY 2014 portion of this test are part of this agreement. A separate agreement will be required in FY 2015 to cover the costs associated with the completion of pre-production testing.

#### Research Projects

The BLS will use data collected in testing, input from the SSA, analysis from internal BLS experts, and/or its institutional survey knowledge to research various issues identified in FY 2013. These research projects in FY 2014 include the following:

- Sample selection, data review, estimation, validation, and other issues related to survey design;
- Development of measures of reliability estimates;
- Measurement of survey error; and
- Resolution of how best to handle jobs whose duties and responsibilities cross multiple occupational classifications.

In addition to the field tests and research described above, the BLS also will work on the following activities in FY 2014:

- Continue to identify and evaluate alternative sample designs;
- Improve outreach and collection materials to gain respondent cooperation;
- Improve data capture system;
- Continue to develop alternative approaches to review collected microdata;
- Continue to develop estimation and validation methods;
- Continue to develop alternative methods for disseminating possible estimates;
- Continue system development activities, such as writing requirements, programming, and testing;

- Attend selected professional conferences to learn more about data users' needs;
- Develop and present training to BLS staff in the national and regional offices;
- Ensure all Office of Management and Budget (OMB) requirements are met;
- Prepare recommendations for FY 2015 activities; and
- Conduct other activities as necessary for the successful completion of the project; and
- Begin considering options for ongoing production of data.