

1 Lori Andrus  
lori@andrusanderson.com  
2 ANDRUS ANDERSON LLP  
155 Montgomery Street  
3 Suite 900  
San Francisco, CA 94104  
4 Tel.: (415) 986-1400  
Fax: (415) 986-1474

5 Joseph M. Sellers  
jsellers@cohenmilstein.com  
6 Christine E. Webber  
cwebber@cohenmilstein.com  
7 Phoebe Wolfe  
pwolfe@cohenmilstein.com  
8 COHEN MILSTEIN SELLERS & TOLL PLLC  
9 1100 New York Ave. NW • Fifth Floor  
Washington, DC 20005  
10 Tel.: (202) 408-4600  
Fax: (202) 408-4699

11 *Attorneys for Plaintiffs, the Proposed Class and Aggrieved Employees*  
12 *Additional counsel listed on next page*

13 **SUPERIOR COURT OF THE STATE OF CALIFORNIA**  
14 **FOR THE COUNTY OF LOS ANGELES**

15 LARONDA RASMUSSEN *et al.*,  
16 Plaintiffs,  
17 vs.  
18 THE WALT DISNEY COMPANY *et al.*,  
19 Defendants.

Case No: 19STCV10974

CLASS ACTION

**DECLARATION OF LEAETTA M. HOUGH, PH.D.**

Judge: Elihu M. Berle  
Department: 6  
Date: November 15, 2023  
Time: 9:00 AM  
Case Filed: April 2, 2019  
Trial Date: None set

21 **UNSEALED BY ORDER OF THE COURT**  
22  
23  
24  
25  
26  
27  
28

1 *Additional counsel for Plaintiffs:*

2 James Kan (SBN 240749)  
jkan@gbdhlegal.com

3 Byron Goldstein (SBN 289306)  
brgoldstein@gbdhlegal.com

4 Stephanie E. Tilden (SBN 341486)  
stilden@gbdhlegal.com

5 GOLDSTEIN, BORGEN, DARDARIAN & HO  
155 Grand Avenue, Suite 900

6 Oakland, CA 94612

Telephone: (510) 763-9800

7 FACSIMILE: (510) 835-1417

8

9

10

11

12

13

14

15

16

17

18

19

20

21

22

23

24

25

26

27

28

1 Lori E. Andrus (SBN# 205816)  
lori@andrusanderson.com  
2 ANDRUS ANDERSON LLP  
155 Montgomery Street, Suite 900  
3 San Francisco, CA 94104  
Telephone: (415) 986-1400  
4 Facsimile: (415) 986-1474

5 Joseph M. Sellers (admitted pro hac vice)  
jsellers@cohenmilstein.com  
6 Christine E. Webber (admitted pro hac vice)  
cwebber@cohenmilstein.com  
7 COHEN MILSTEIN SELLERS & TOLL PLLC  
1100 New York Ave. NW, Fifth Floor  
8 Washington, DC 20005  
Telephone: (202) 408-4600  
9 Facsimile: (202) 408-4699

10 James Kan (SBN 240749)  
jkan@gbdhlegal.com  
11 Byron Goldstein (SBN 289306)  
brgoldstein@gbdhlegal.com  
12 Stephanie E. Tilden (SBN 341486)  
stilden@gbdhlegal.com  
13 GOLDSTEIN, BORGES, DARDARIAN & HO  
155 Grand Avenue, Suite 900  
14 Oakland, CA 94612  
Telephone: (510) 763-9800  
15 Facsimile: (510) 835-1417

16 *Attorneys for Plaintiffs, the Proposed Class, and Aggrieved Employees*

17  
18 SUPERIOR COURT OF THE STATE OF CALIFORNIA  
19 COUNTY OF LOS ANGELES

20 LARONDA RASMUSSEN, et al.,  
21 Plaintiffs,  
22 vs.  
23 THE WALT DISNEY COMPANY, et al.,  
24 Defendants.

Case No: 19STCV10974

CLASS ACTION

**SUPPLEMENTAL DECLARATION OF  
LEAETTA M. HOUGH, PH.D.**

Judge: Elihu M. Berle  
Department: 6  
Date: November 15, 2023  
Time: 9:00 AM  
Case Filed: April 1, 2019  
Trial Date: None set

27 **MAY NOT BE EXAMINED WITHOUT COURT ORDER - CONTAINS**  
28 **MATERIALS FROM CONDITIONALLY SEALED RECORD**

1 I, Leaetta M. Hough, declare as follows:

2 1. I am an Industrial-Organizational (I-O) Psychologist with over 40 years of experience.  
3 I am the current president and founder of the Dunnette Group, Ltd., which is a research and  
4 development organization specializing in solutions to issues related to human resources in the  
5 workplace. During my I-O psychology career, I have developed specialized knowledge and experience  
6 in the design, validation, implementation, and evaluation of employee selection, promotion,  
7 performance evaluation, compensation, and performance management procedures and systems. This  
8 includes classifying people and jobs, forming job families, and evaluating whether jobs are  
9 substantially similar. I have done this work for the Department of Justice, large corporations, the  
10 military, and other government organizations. I have been a court-appointed expert.

11 2. My peers have repeatedly recognized my expertise and accomplishments, including  
12 with awards and election as the president of leading I-O and other scientific organizations. I have been  
13 elected and served as the president of the leading professional organization for I-O Psychologists as  
14 well as other major scientific professional organizations. I am a past president of the Society for  
15 Industrial and Organizational Psychology (“SIOP”), the professional organization for I-O  
16 Psychologists nationally and internationally, with over 10,000 members. I also served as the president  
17 of the Federation of Associations in Behavioral and Brain Sciences (“FABBS”), a coalition of 26  
18 scientific societies and 62 university affiliates that, among other things, promotes scientific research  
19 and training in the sciences of mind, brain, and behavior. I also co-founded three organizations:  
20 Personnel Decisions Research Institute (PDRI), Minnesota Professionals for Psychology Applied to  
21 Work (MPPAW) and Invent Minnesota.

22 3. In addition, numerous scientific organizations have recognized my accomplishments  
23 and contributions. I received SIOP’s Distinguished Professional Contributions Award, a lifetime  
24 achievement award and one of its most prestigious awards. SIOP also awarded me its 2019 Scientist-  
25 Practitioner Presidential Recognition. From FABBS, I received the “In Honor Of” award. I am a  
26 fellow of four professional organizations – Association for Psychological Science (APS), American  
27 Psychological Association (APA), APA’s Division 14 (SIOP), and APA’s Division 5 (Division of  
28

1 Evaluation, Measurement, and Statistics). I am the 2020 recipient of the University of Minnesota  
2 Psychology Department's Distinguished Alumni Award.

3 4. I have published dozens of articles in refereed journals, book chapters, and reviews.  
4 Noteworthy are my roles as co-editor of the four-volume Handbook of Industrial & Organizational  
5 Psychology, and lead author of the personnel selection chapter for the Annual Review of Psychology,  
6 the biodata chapter in the Handbook of Workplace Assessment: Selecting and Developing Talent, and  
7 the personality chapters in the International Handbook of Work & Organizational Psychology, the  
8 Handbook of Personnel Selection, both editions of the I-O Psychology volume of the Comprehensive  
9 Handbook of Psychology, and the APA Handbook on Testing and Assessment. Three of my articles  
10 were reprinted in Employee Selection and Performance Management, a book consisting of articles that  
11 I-O Psychologists identified as the seminal publications in the last 100 years. My work has helped  
12 shape the science and practice of I-O Psychology.

13 5. I have been asked by counsel for plaintiffs to consider certain issues in conjunction with  
14 plaintiffs' motion for class certification.

15 6. I have agreed to testify at trial, and I will be sufficiently familiar with the pending  
16 action to provide a meaningful oral deposition regarding the specific testimony I would be expected to  
17 give at trial (including my opinions and their basis). I am currently compensated at \$550 per hour for  
18 both my expert opinion work and my testimony in depositions or at trial.

19 7. I wrote a report dated June 27, 2023 setting forth my opinions and the basis of those  
20 opinions.

21 8. Attached hereto is a true and correct copy of an amended report, which corrects  
22 inadvertent minor typographical and cite checking mistakes that I have since identified in my June 27,  
23 2023 report. None of these corrections affect the substance of my June 27, 2023 report.

24 9. The attached amended report is identical to my June 27, 2023 report except for the  
25 following changes:


<b>Page</b>	<b>June 27, 2023 Report</b>	<b>Amendment</b>
4	is	its
18, fn 40	Workday Compensation Planning Tool: 2022 Leader Overview,	Workday Compensation Planning Tool: 2022 HRBP

	DISNEY-000031484 at 31589	Overview, DISNEY-000035478 at 35496
23	• Problem Solving, Impact, and	• Problem Solving, • Business Impact, and
25	Media Delivery Job Family	Media Delivery – QC Managers and Media Delivery – QC Technician Job Families
39, fn 146	DISNEY-000031484 at 31489	DISNEY-000035478 at 35496
48, 50, 52-54, 56, 58-59, 63	Continued	<i>Continued</i>
Appendix B – Page 1	First Joint Request for an Informal Discovery Conference (Re: Requests for Production Set 6),	First Joint Request for an Informal Discovery Conference (Re: Requests for Production Set 16),

10. In addition, Appendix B to the amended report lists “Plaintiffs’ Sixteenth Set of Requests for Production of Documents, Nov. 18, 2022,” “Stipulation and Order Regarding Confidential Information, April 2, 2019,” “Corrected 4th Amended Complaint, April 14, 2021 (filed April 15, 2021)” under “Materials Provided,” and “Disney Website, last accessed 6/23/23” under “Materials Relied Upon in Report.” These documents were inadvertently omitted from my June 27, 2023 report.

11. Appendix B to the amended report also corrects the formatting of the list of depositions under “Materials Relied Upon in Report.”

I swear under penalty of perjury under the laws of the State of California that the foregoing is true and correct. This declaration is executed in St. Paul, MN on 7/28/2023.

DocuSigned by:  
  
 PD2197AB3AE44FB...  
 Leaetta M. Hough, Ph.D.

# **ATTACHMENT 1**

**Amended Expert Report of Leaetta M. Hough, Ph.D.**

**In the matter of:**

**Rasmussen et al., Individually and on Behalf  
of all Others Similarly Situated, Plaintiffs,**

**v.**

**The Walt Disney Company**

**Case No. 19STCV10974**

Prepared by  
Leaetta M. Hough, Ph.D.  
The Dunnette Group, Ltd.  
370 Summit Avenue  
St. Paul, MN 55102  
651-227-4888  
leaetta@msn.com

A handwritten signature in black ink, appearing to read "Leaetta Hough". The signature is written in a cursive style with a long, sweeping underline.

**July 28, 2023**

## TABLE OF CONTENTS

	<b>Page</b>
I. PURPOSE.....	1
II. SUMMARY OF OPINIONS.....	1
III. CREDENTIALS OF THE AUTHOR.....	4
IV. MATERIALS REVIEWED.....	7
V. BODY OF EXPERT REPORT.....	8
A. Scientific Foundation for Developing and Evaluating Human Resource Management Policies and Practices – Industrial and Organizational (I-O) Psychology.....	8
B. Scientific Foundation for Valid Job Evaluation and Classification.....	11
C. Disney’s Job Architecture: Four Components, Companywide, Continually Updated, Foundational for Disney’s HR Management Systems including Compensation.....	14
1. Overview and Goals of Disney’s Job Architecture.....	14
2. The Four Components of Disney’s Job Architecture.....	19
(i) Career Bands and Job Levels (Classifying by Level of Work)	19
(ii) Job Functions and Job Families (Classifying by Type of Work)	23
3. Job Family/Job Level Composites.....	24
D. Disney’s Companywide Development and Implementation of its Job Architecture.....	27
E. Continual Updating of Disney’s Job Architecture to Ensure Accuracy of Job Classifications.....	31
F. Disney’s Job Architecture – Foundational for Disney’s HR Management Systems, including Compensation.....	35
1. Disney’s Job Architecture Is Foundational for Compensation.....	35
2. Disney’s Job Architecture Foundational for Other Disney HR Management Systems.....	39
VI. CONCLUSIONS.....	41
REFERENCES.....	43
Table 1 Broad Definitions of Roles in Each of the Five Disney Career Bands.....	46

Table 2 Definitions/Criteria for Job Levels within Disney’s Business Support Band.....47

Table 3 Definitions/Criteria for Job Levels within Disney’s Technical Support Band ....49

Table 4 Definitions/Criteria for Job Levels within Disney’s Professional Band.....51

Table 5 Definitions/Criteria for Job Levels within Disney’s Management Band.....55

Table 6 Definitions/Criteria for Job Levels within Disney’s Executive Band .....57

Table 7 Other - Frontline Operational Jobs, Attorneys, and Unique Positions .....60

Table 8 SAMPLE List of Disney Job Functions.....61

Table 9 Examples of Disney Job Families Embedded within Job Functions .....62

Table 10 Example of the Detailed Job Information for Seven Disney Job Family/Job Level Composites.....64

Appendix A: Curriculum Vitae of Dr. Leaetta M. Hough

Appendix B: Material Provided to Me, Dr. Leaetta M. Hough, by Plaintiffs’ Attorneys and Documents Relied Upon in Report

Appendix C: Dr. Hough Expert Witness Work that Included Under-Oath Testimony

## **I. PURPOSE**

I was asked whether The Walt Disney Company (hereafter referred to as TWDC or Disney) has jobs with substantially similar work. This report contains my professional opinions regarding Disney's job architecture and its approach to grouping jobs with substantially similar work<sup>1</sup> because Disney's policy and practice of grouping substantially similar jobs is relevant to determining the appropriate level/unit for examining gender pay equity at Disney in this matter.

I am one of plaintiffs' expert witnesses. I am an Industrial Organizational (I-O) Psychologist. I-O Psychologists routinely examine the content and requirements of work (e.g., skills, abilities, knowledge, competencies, effort, and tasks/activities performed) as well as the context and conditions of the work (e.g., level of responsibility, scope, and complexity) to determine whether jobs are substantially similar for purposes of determining appropriate compensation.

I understand that this report will be used in support of Plaintiffs' Motion for Class Certification. If more information or evidence becomes available, I may supplement or revise my opinions prior to trial.

## **II. SUMMARY OF OPINIONS**

Disney has created, implemented, and maintained a job architecture because it enables Disney to implement its human resource (HR) management practices systematically across its businesses, including the efficient movement of employees across its businesses. These enterprise-wide HR management practices also include compensation, as well as hiring, promotion, and career development.

In support of this objective, Disney developed a Global Job Leveling Framework that Disney applied to all the Relevant Positions. Disney uses this Framework to describe and

---

<sup>1</sup> The Relevant Positions in this case are those in California, since April 1, 2015, below the level of Vice President. The relevant positions do not include individuals working in Hulu, ESPN, Pixar, 21st Century Fox, FX, National Geographic, Bamtech, or ILM; employees in the HR\_Compensation job family; or any in-house counsel actually involved in representing Disney with respect to this case.

differentiate jobs such that highly similar jobs are grouped together for the express purpose of ensuring that employees in highly similar – substantially similar – jobs throughout Disney’s business units are treated similarly in terms of pay, promotion, and career development.

Disney’s job architecture/structure includes a) Job Functions, b) Job Families, c) Career Bands, and d) Job Levels. Job Functions and Job Families identify the type of work, Job Families are within Job Functions, and Job Families more specifically identify the type of work. Bands and Job Levels identify the level of work, Job Levels are within Bands, and Job Levels contain more specific criteria.

DISNEY’S CLASSIFICATION BY LEVEL OF WORK	DISNEY’S CLASSIFICATION BY TYPE OF WORK
<p><b>Career Bands</b> define how different types of jobs contribute to the organization and their nature of work. Disney’s Career Bands include: Business Support, Technical Support, Professional, Management, Attorney, and Executive. Within each Career Band, there are a series of unique Job Levels that are defined by the specific responsibilities and skills required to perform the work.</p>	<p><b>Job Functions</b> are major categories of job disciplines. Examples of Job Functions are Finance, Technology, Human Resources, Animation and Visual Effects, Graphic Design, Games, and Security.</p>
<p><b>Job Levels</b> differentiate jobs in terms of the responsibility, complexity, discretionary authority, decision making, and scope of the job. The same Levels are used across Disney and across Job Functions and Job Families. In short, Levels differentiate jobs within Job Families.</p>	<p><b>Job Families</b> are embedded within Job Functions and consist of jobs that require specific skills and abilities to perform highly similar kinds of work. A Job Family constitutes a specific discipline. For example, Accounts Payable &amp; Receivable, Collections &amp; Credit, Information Systems Audit are examples of Job Families that are embedded within Finance, a Job Function.</p>

Disney’s Global Job Leveling Framework provides the overarching strategy for classifying jobs. When Disney implemented this Framework, it did so across the company and based on the same specific criteria. For this implementation, Disney sought to “ensure consistency” across all jobs leveled through several rounds of calibration.

Around the time Disney was completing implementation of its Global Job Leveling Framework, Disney began forming consistent job families across the company. Like its implementation of the Global Job Leveling Framework, the formation of consistent job families was centrally-led and company-wide. Disney has used Job Families to group jobs by type of work. In identifying job families, Disney applied its Global Job Leveling Framework to further differentiate jobs according to its specific criteria for Job Levels. Disney thus determined each job's type of work (Job Family) and further distinguished jobs within a Job Family with the level of responsibility required for the job (Job Levels).

This combination, of Job Family and Job Level (i.e., "Job Family/Job Level Composite"), revealed which jobs require similar skills, effort, and responsibilities. Jobs that have been classified within the same Job Family at the same Job Level are thus substantially similar.

Disney initially slotted jobs into the Global Job Leveling Framework by using descriptive job information and has since maintained the application of its job architecture, thus ensuring that jobs within the same Job Family and Job Level remain substantially similar. When new businesses are formed or added, for example, Disney ensures the jobs are mapped (Disney uses the term "harmonized") onto Disney's job architecture. In addition, new Job Functions<sup>2</sup> and new Job Families are added as needed to maintain the nature of work and ensure that jobs within a Job Family and Level remain substantially similar in terms of the skills, effort, responsibilities, duties, and activities of the work.

Disney's job architecture is foundational to how it compares jobs and sets compensation throughout Disney. According to Disney, an important purpose of the Global Job Leveling Framework is to ensure consistency and fairness (internal and external equity) of its compensation programs and practices across its businesses. For example, this architecture allows Disney to implement its decision that jobs within the same region, Job Family, and Job Level should be paid comparably. It is also foundational to other Disney human resource management

---

<sup>2</sup> Disney has also referred to Job Functions as "Job Families." See, e.g., DISNEY-000031566 at 31577.

systems, including recruitment, job transfer, promotion, and career development. Employee movement across Disney businesses facilitates career and succession planning throughout Disney.

Using Disney's Global Job Leveling Framework, Disney's jobs have been carefully studied and systematically structured into a job architecture that produces groupings of substantially similar jobs. The job architecture is based on job-related information and is used for the purpose of enabling Disney to implement its compensation programs and practices (as well as other HR management programs and practices) systematically across its many businesses. This job-related information is the same kind of job information as that used by I-O Psychologists to classify jobs into substantially similar job groups based on the skills, effort, and responsibilities required of the work. Thus, Disney has developed classifications of its jobs such that jobs within a Job Family/Job Level Composite are substantially similar to each other.

Accordingly, based on Disney's specific criteria, processes, descriptions, purposes, and uses of its job architecture, it is my professional opinion, as an I-O Psychologist, that Disney employees within the same Job Family and Job Level (i.e., Job Family/Job Level Composite) are in jobs with substantially the same work. Disney's Global Job Leveling Framework was created, implemented, and updated to accomplish such an outcome in order to facilitate systematic and consistent treatment of its compensation, recruitment, promotion, and career development practices across Disney's many businesses.

### **III. CREDENTIALS OF THE AUTHOR**

In my over 40 years as an Industrial and Organizational (I-O) Psychologist, I have developed specialized knowledge and experience in the design, validation, implementation, and evaluation of employee selection, promotion, performance evaluation, compensation, and performance management procedures and systems. This includes classifying people and jobs, forming job families, and evaluating whether jobs are substantially similar. I have done this work for the Department of Justice, large corporations, the military, and other government organizations. I have been a court-appointed expert. My peers have repeatedly recognized my

expertise and accomplishments, including with awards and election as the president of leading I-O and other scientific organizations. I was a member of the panel that revised one of the main sources of authority for I-O Psychologists, the *Principles for the Validation and Use of Personnel Selection Procedures* (“*SIOP Principles*”). And I have published dozens of articles concerning I-O Psychology in peer-reviewed journals and books.

I received a doctorate in Industrial and Organizational (I-O) Psychology in 1981 from the University of Minnesota. I am regarded as one of the country’s leaders in developing and implementing innovative candidate assessment systems and human resource management systems. My focus is on a) analyzing work and the skills, abilities, knowledge, and other characteristics required to perform that work; b) creating tools to reliably and accurately evaluate a candidate’s workplace characteristics that predict on-the-job outcomes; and c) designing, implementing, and evaluating human resource management systems.

I have substantial experience analyzing work, skills, and abilities needed to perform work, and the standards against which to evaluate job candidates and performance effectiveness of job incumbents. I have been hired by dozens of companies. I am an expert in designing, developing, implementing, and evaluating classification and measurement systems of work, people, and performance – HR management systems.

I am recognized as an expert in these matters by my colleagues. I have been elected and served as the president of the leading professional organization for I-O Psychologists as well as other major scientific professional organizations. I am a past president of the Society for Industrial and Organizational Psychology (“*SIOP*”), the professional organization for I-O Psychologists nationally and internationally, with over 10,000 members. I also served as the president of the Federation of Associations in Behavioral and Brain Sciences (“*FABBS*”), a coalition of 26 scientific societies and 62 university affiliates that, among other things, promotes scientific research and training in the sciences of mind, brain, and behavior. I am also the president and founder of the Dunnette Group, Ltd. I also co-founded three organizations:

Personnel Decisions Research Institute (PDRI), Minnesota Professionals for Psychology Applied to Work (MPPAW) and Invent Minnesota.

In addition, numerous scientific organizations have recognized my accomplishments and contributions. I received SIOP's Distinguished Professional Contributions Award, a lifetime achievement award and one of its most prestigious awards. SIOP also awarded me its 2019 Scientist-Practitioner Presidential Recognition. From FABBS, I received the "In Honor Of" award. I am a fellow of four professional organizations – Association for Psychological Science (APS), American Psychological Association (APA), APA's Division 14 (SIOP), and APA's Division 5 (Division of Evaluation, Measurement, and Statistics). I am the 2020 recipient of the University of Minnesota Psychology Department's Distinguished Alumni Award.

As mentioned earlier, I was on SIOP's Advisory Panel for the revision of the *Principles for the Validation and Use of Personnel Selection Procedures (4th edition; 2003)*, known as *SIOP Principles*, which is one of three documents that courts often use to evaluate employment decisions related to hiring, training, placing, certifying, compensating, promoting, terminating, transferring, and/or other actions that affect employment status. More recently, I was a member of the SIOP committee that revised and updated the *Principles (5th edition; 2018)*. These *Principles* are intended to specify established scientific findings and generally accepted professional practice in the field of personnel selection. Also important, I was the lead committee member of the American Psychological Association (APA) "Committee on Psychological Tests and Assessment" responsible for the chapter on personnel selection in the 1999 revision of the *Standards for Educational and Psychological Testing*, referred to as the *Standards*. The *Standards* constitute the second of three professional documents that the courts use to evaluate employment decisions. Even more recently, I was a member of SIOP's task force that developed *Considerations and Recommendations for the Validation and Use of Artificial Intelligence (AI)-Based Assessments for Employee Selection*.

I have published dozens of articles in refereed journals, book chapters, and reviews. Noteworthy are my roles as co-editor of the four-volume *Handbook of Industrial &*

*Organizational Psychology*, and lead author of the personnel selection chapter for the *Annual Review of Psychology*, the biodata chapter in the *Handbook of Workplace Assessment: Selecting and Developing Talent*, and the personality chapters in the *International Handbook of Work & Organizational Psychology*, the *Handbook of Personnel Selection*, both editions of the I-O Psychology volume of the *Comprehensive Handbook of Psychology*, and the *APA Handbook on Testing and Assessment*.

Three of my articles were reprinted in *Employee Selection and Performance Management*, a book consisting of articles that I-O Psychologists identified as the seminal publications in the last 100 years. My work has helped shape the science and practice of I-O Psychology.

I was also General Chair of SIOP's Leading Edge Consortium "Enabling Innovation in Organizations," a conference devoted to the understanding, predicting, and facilitating creativity and innovation. I was also a co-founder of Invent Minnesota, an organization established to identify and foster creativity and innovation among young people. Identification and measurement of characteristics of people and environments that facilitate and are conducive to the creative process and innovation are areas of specialized knowledge for me.

In addition to having been recognized by my peers as an expert in HR talent and skill assessment and management, I have been recognized as an expert in these matters in litigation and arbitration cases. My full curriculum vitae appears in Appendix A.

I have been retained by Plaintiffs' counsel to serve as an expert in the present case. My rate of compensation is \$550 per hour for the work performed under this assignment.

#### **IV. MATERIALS REVIEWED**

I have read extensively in areas relevant to issues in this case during my career. Some of the books, articles, and other materials are referenced in this report; others are not. All, in one form or another, have influenced my thinking, research, and practice, and all form the foundation of my opinions in this case. It is impossible to list them all in this report, I cite many, and I rely heavily on the SIOP *Principles, Uniform Guidelines*, and the AERA/APA/NCME *Standards*.

I have been provided with all the documents Disney produced and deposition transcripts of its witnesses. The materials I have reviewed are listed in Appendix B of this report.

Cases in which I have been an expert witness and testified under oath are listed in Appendix C.

## **V. BODY OF EXPERT REPORT**

### **A. Scientific Foundation for Developing and Evaluating Human Resource Management Policies and Practices – Industrial and Organizational (I-O) Psychology**

I-O Psychology is the study of work, people at work, and the context or environment (psychological and physical) in which people work. I-O Psychologists apply the scientific method to study issues relevant to organizations, work, and people at work in those organizations. I-O Psychologists study many topics related to these issues, including work analysis, personnel selection, compensation, talent assessment, promotion, termination, training, performance evaluation, culture, employment discrimination, HR management policies and practices that affect fair and equitable treatment of all workers as well as those policies and practices that adversely impact protected classes.<sup>3</sup> I-O Psychologists are routinely involved as subject matter experts in the evaluation of HR management policies and practices.

I-O Psychology provides the scientific basis (both through quantitative and qualitative analysis) and the foundation that government agencies, such as the Equal Employment Opportunity Commission (EEOC) and the Department of Labor's Office of Federal Contract Compliance Programs (OFCCP), use to evaluate the merits of HR management policies and practices. I-O psychology research (current at the time) helped inform the *Uniform Guidelines on Employee Selection Procedures* (Uniform Guidelines).<sup>4</sup>

---

<sup>3</sup> Rogelberg, S. G. (2007). Introduction. In S. G. Rogelberg (Ed.), *Encyclopedia of industrial organizational psychology*, vol. 1, p. xxxv. Outtz, J. L. (Ed.). (2010). *Adverse impact: Implications for Organizational Staffing and High-stakes Selection*.

<sup>4</sup> 29 C.F.R. 1607.1(C).

The *Uniform Guidelines* are a set of principles and standards that were jointly adopted in 1978 by four federal agencies – EEOC, Civil Service Commission (CSC), Department of Labor (DOL), and the Department of Justice (DOJ) – to provide a uniform set of principles for determining the proper use of selection procedures in employment decisions. They were intended and are used to evaluate employment decisions with the goal of prohibiting discrimination in employment practices based on race, color, religion, sex, or national origin.<sup>5</sup> They are used to enforce the equal employment opportunity laws, and California adopted the *Uniform Guidelines*.<sup>6</sup>

Most I-O Psychologists belong to the Society for Industrial and Organizational Psychology (SIOP), an organization consisting of 10,000+ I-O Psychologists from around the world. The *Principles for the Validation and Use of Personnel Selection Procedures* (hereafter referred to as the *Principles*) is one of SIOP’s most important contributions to the fair employment of human talent, and it is one of the key resources that U.S. federal agencies and the U.S. legal system use to evaluate HR management systems. The *Principles* are intended to be (and are) used broadly. The *Principles* define personnel decisions as “decisions to hire, train, place, certify, compensate, promote, terminate, transfer, or take other actions that affect aspects of employment”<sup>7</sup> (p. 4, *Principles*, 5<sup>th</sup> edition). The *Principles* refer to the *Standards for Educational and Psychological Testing*<sup>8</sup> (hereafter referred to as the *Standards*). The field of Industrial and Organizational Psychology embraces the *Standards* and intends that the *Principles*

---

<sup>5</sup> Uniform Guidelines on Employee Selection Procedures. (1978). 43 *Federal Register* 38290-38315; See 29 C.F.R. 1607.1 *et seq.*

<sup>6</sup> Cal. Code Regs. tit. 2, § 11017 (“The Council herein adopts the *Uniform Guidelines on Employee Selection Procedures* promulgated by various federal agencies, including the EEOC and Department of Labor. [29 C.F.R. 1607 (1978)].”).

<sup>7</sup> Society for Industrial and Organizational Psychology. (2018). *Principles for the Validation and Use of Personnel Selection Procedures* (5<sup>th</sup> edition). Cambridge, MA: Cambridge University Press.

<sup>8</sup> American Educational Research Association, American Psychological Association, National Council on Measurement in Education. (2014). *Standards for educational and psychological testing*. Washington D.C.: American Educational Research Association.

be consistent with the *Standards*.<sup>9</sup> These documents and their standards, guidelines, and principles are important to issues in this case.

Validation is an important activity in I-O Psychology, specifically in the development of human resource management systems to ensure that they are job-related and result in valid personnel decisions. The SIOP *Principles* and the AERA/APA/NCME *Standards* refer to “validation” as a process that involves accumulating, analyzing, and summarizing relevant evidence for a specific and intended use. For example, the *Standards* states: “The validation process often begins with a job analysis in which information about job duties and tasks, responsibilities, worker characteristics, and other relevant information is collected.” (p. 171, *Standards*). Job analysis is the foundation for developing valid job groupings based on the similarity of required skills, abilities, duties, activities, and responsibilities of work. It is a key step in having job-related HR management systems, their components, and their uses.

The EEOC uses the principles and guidelines embodied in the *Principles*, *Standards*, and *Uniform Guidelines* when it evaluates employment practices. The U.S. Department of Labor’s OFCCP embraces these principles and guidelines as well.<sup>10</sup> OFCCP Directive (DIR 2018-05) outlines OFCCP procedures for reviewing contractor compensation systems and practices.<sup>11</sup> Federal agencies charged with auditing and investigating organizations to identify and reduce unfair labor practices (including pay inequities for protected classes) use the *Principles*, *Standards*, and *Guidelines* to evaluate an organization’s human resource management policies and practices. I am aware that the U.S. legal system also uses these documents to evaluate personnel decisions for job-relatedness and fairness for protected classes.

---

<sup>9</sup> See page 1 of *5th edition* of the *Principles* and page *viii* of the *4th edition* of the *Principles*.

<sup>10</sup> U.S. Department of Labor, Office of Federal Contracts Compliance Programs (OFCCP) *Federal Contract Compliance Manual*, October 2014; pp. 43-44. U.S. Department of Labor, Office of Federal Contract Compliance Programs Directive (DIR) 2018-05.

<sup>11</sup> U.S. Department of Labor, Office of Federal Contract Compliance Programs Directive (DIR) 2018-05.

These documents and the standards, guidelines, and principles they espouse have their foundation in Industrial and Organizational (I-O) Psychology. Its research findings and publications provide principles and standards that guide practitioners in the development and implementation of human resource management systems. These principles and standards also provide the basis for evaluating HR management systems for their job-relatedness, fairness, effectiveness, and legal defensibility. Relatedly, I-O Psychology provides the foundation for conducting job analyses, which includes determining competencies, knowledge, skills, and abilities required for jobs.

### **B. Scientific Foundation for Valid Job Evaluation and Classification**

Job analysis, also referred to as work analysis, is a key element in developing job-related, fair employment practices for virtually all HR management systems including selection, placement, training and development, job transfer, promotion, performance appraisal, compensation, and termination decisions and systems. Job/work analyses is an important topic in I-O Psychology and a significant amount of research has been devoted to the topic.<sup>12</sup> Grouping

---

<sup>12</sup> See, for example:

Gael, S. (1988). Preface. In S. Gael (Ed.), *The job analysis handbook for business, industry, and government* (Vols. I & II, pp. xv-xvii). New York: John Wiley & Sons, Inc.

Gael, S. (Ed.) (1988). *The job analysis handbook for business, industry, and government* (Vols. I & II). New York: John Wiley & Sons, Inc.

Harvey, R. J. (1991). Job analysis. In M. D. Dunnette & L. M. Hough, (Eds.) *Handbook of industrial and organizational psychology*, vol. 2, 2nd ed. (pp. 71-163). Palo Alto, CA: Consulting Psychologists Press, Inc.

Howard, A. (Ed.). (1995). *The changing nature of work*. San Francisco, CA: Jossey-Bass.

Morgeson, F. P. (2007). Job analysis and job analysis methods. In S. G. Rogelberg (Ed.), *Encyclopedia of industrial and organizational psychology* (Vol. 1, pp. 377-383). Thousand Oaks, CA: Sage.

Peterson, N. G., Mumford, M. D., Borman, W. C., Jeanneret, P. R., & Fleishman, E. A. (Eds.) (1999). *An occupational information system for the 21st century: The development of O\*NET*. Washington, DC: American Psychological Association.

Peterson, N. G., Mumford, M. D., Borman, W. C., Jeanneret, P. R., Fleishman, E. A., Levin, K. Y., Champion, M. A., Mayfield, M. S., Morgeson, F. P., Pearlman, K., Gowing, M. K.,

jobs into job families or clusters of jobs with substantially similar work is a frequent activity for I-O Psychologists conducting work/job analysis.

The *Principles, Standards, Uniform Guidelines*, and I-O Psychology consider work analysis as the foundation for learning about and identifying the knowledge, skills, abilities, competencies, and other characteristics that enable people to perform the work itself, the conditions of work, the level of responsibility, complexity, level of competence required, and the context of the work. Analysis of work is important in the present case because analyses to determine whether men and women are paid equitably hinge on the determination that their jobs are for substantially equal or similar work.

There are many accepted ways and methods of conducting job analysis. Handbooks on job/work analysis, chapters in personnel selection handbooks, chapters in I-O Psychology handbooks, and related articles and books on validation of personnel decisions describe many qualitative and quantitative methods and strategies for analyzing work, work context, and the knowledge, skills, abilities and other characteristics that enable and facilitate work

---

Lancaster, A. R., Silver, M. B., & Dye, D. M. (2001). Understanding work using the occupational information network: Implications for practice and research. *Personnel Psychology*, 54, 451-492.

Sackett, P. R., Walmsley, P.T., & Laczko, R. M. (2013). Job and work analysis. In I. B. Weiner (Ed.-in-Chief), *Handbook of psychology*; In W. C. Borman, D. R. Ilgen, & R. J. Klimoski (Eds.), *Handbook of psychology: Industrial and organizational psychology* (Vol. 12, pp. 61-81). New York: Wiley.

Sanchez, J. I., & Levine, E. L. (2001). The analysis of work in the 20th and 21st centuries. In N. Anderson, D. S. Ones, H. K. Sinangil, & C. Viswesvaran (Eds.), *Handbook of industrial, work and organizational psychology* (Vol. 1: *Personnel Psychology*, pp. 71-89). London and New York: Sage.

Wilson, M. A., Bennett, W. Jr., Gibson, S. G., & Alliger, G. M. (Eds.). (2012). *The Handbook of work analysis: Methods, systems, applications and science of work measurement in organizations*. New York, NY: Routledge – Taylor & Francis Group.

accomplishment.<sup>13</sup> Authors of these scholarly materials concur in stating that there is no one single way, method, or strategy for analyzing work.

Similarly, the *SIOP Principles* and the *Uniform Guidelines* are clear that there is no one single method or strategy for analyzing work. According to the *Principles*, “There is no single approach that is the preferred method for the analysis of work.” (p. 12, *Principles*).

When information detailing the work and its requirements (for example, skill, effort, responsibilities, competencies, job duties) is available and current, additional work such as surveys and so forth may not be necessary. This information is commonly gathered from subject matter experts, such as HR Business Partners (HRBPs). Subject matter experts in the context of job analysis are individuals with a thorough knowledge of the work behaviors, activities, and responsibilities of the jobs and the competencies, knowledge, skills, and abilities needed for effective performance on the job.

The information gained from job/work analyses is fundamental to development of job-related HR management systems and tools. It does not, however, ensure that those systems and

---

<sup>13</sup> See, for example:

Anderson, N., Ones, D. S., Sinangil, H. K., & Viswesvaran, C. (Eds.) (2001). *Handbook of industrial, work and organizational psychology* (Vols. 1-2). London and New York: Sage.

Dunnette, M. D. (Ed.) (1976). *Handbook of industrial and organizational psychology*. Chicago, IL: Rand McNally.

Dunnette, M. D., & Hough, L. M. (Eds.). (1990-1994). *Handbook of Industrial Organizational and Psychology* (Vols. 1-4). Palo Alto, CA: Consulting Psychologists Press.

Gael, S. (Ed.) (1988). *The job analysis handbook for business, industry, and government* (Vols. I & II). New York: John Wiley & Sons, Inc.

Harvey, R. J. (1991). Job analysis. In M. D. Dunnette & L. M. Hough, (Eds.) *Handbook of industrial and organizational psychology*, vol. 2, 2nd ed. (pp. 71-163). Palo Alto, CA: Consulting Psychologists Press, Inc.

McPhail, S. M. (Ed.). (2007). *Alternative validation strategies: Developing new and leveraging existing validity evidence*. San Francisco, CA: Jossey-Bass.

Wilson, M. A., Bennett, W. Jr., Gibson, S. G., & Alliger, G. M. (Eds.). (2012). *The Handbook of work analysis: Methods, systems, applications and science of work measurement in organizations*. New York, NY: Routledge – Taylor & Francis Group.

tools are implemented and used in ways that are fair for protected groups such as women. How those systems and tools are used and their impact on people is also a key factor in the fair and just management of human talent.<sup>14</sup>

Disney has developed detailed criteria and descriptions to help ensure accurate classifications of its jobs that are substantially similar in terms of duties, activities, skills, responsibilities, complexity, effort, decision-making authority, and scope. The job analysis work is ongoing. Disney's Job Family/Job Level Composites change as work at Disney changes ensuring that the jobs within the same Job Family and Job Level remain substantially similar.

**C. Disney's Job Architecture: Four Components, Companywide, Continually Updated, Foundational for Disney's HR Management Systems including Compensation**

**1. Overview and Goals of Disney's Job Architecture**

Disney is a diversified entertainment company.<sup>15</sup> One way it has organized the company is through Segments.<sup>16</sup> Disney has frequently combined, reorganized, or otherwise changed its Segments over the last eight years. There were seven segments in 2015.<sup>17</sup> Shortly thereafter,

---

<sup>14</sup> American Educational Research Association, American Psychological Association, National Council on Measurement in Education. (2014). *Standards for educational and psychological testing*. Washington D.C.: American Educational Research Association. Society for Industrial and Organizational Psychology. (2018). *Principles for the Validation and Use of Personnel Selection Procedures (5th edition)*. Cambridge, MA: Cambridge University Press. Uniform Guidelines on Employee Selection Procedures. (1978). 43 *Federal Register*, 38290-38315.

<sup>15</sup> See Defendants' Supplemental and Amended Response to Plaintiffs' Special Interrogatories, Set Two, No. 19, Oct. 2, 2020.

<sup>16</sup> Disney's Segments are broad business areas into which Disney organizes its subsidiary companies. See Defendant's Supplemental and Amended Response to Plaintiffs' Special Interrogatories, Set Two, No. 19, Oct. 2, 2020, explaining Disney's organization into Segments, and identifying Segments as of 2020; Defendant's Supplemental Objections and Responses to Plaintiffs' Special Interrogatories, Set Six, No. 53, March 22, 2022, identifying the Segments in place in 2022.

<sup>17</sup> (1) Corporate; (2) Studio; (3) Walt Disney Parks & Resorts ("WDPR"); (4) Disney Interactive ("DI"); (5) Disney Consumer Products ("DCP"); (6) Media, consisting of ESPN and Disney ABC Television Group ("DATG"); and (7) International. See DISNEY-000005790 at 5794 (listing eight segments); Ex. 849 to the Dep. of Janet Pate ("Pate Dep."), Apr. 19, 2023(March

Disney combined two of these segments.<sup>18</sup> Disney combined two of its Segments again, in 2018, into a new segment.<sup>19</sup> Also in 2018, Disney created a new segment.<sup>20</sup> In 2020, Disney created a new segment that mostly replaced an existing segment,<sup>21</sup> and in 2023, Disney moved to what it states are three segments.<sup>22</sup>

Disney's HR structure includes a Chief Human Resources Officer, who reports to the CEO, and who leads Disney's HR Strategy.<sup>23</sup> A Senior Vice President overseeing compensation reports to the Chief Human Resources Officer.<sup>24</sup> Segments have an HR SVP and a Segment VP of Compensation.<sup>25</sup> Disney's Corporate segment has a VP for Enterprise Compensation and a VP for Executive Compensation, who report to Disney's Compensation SVP.<sup>26</sup> Enterprise Compensation and Executive Compensation govern "design of enterprise-wide pay programs"

---

2018 announcement from Disney stating, "Disney's media properties—including ESPN, ABC ...—will move from Media Networks to the new Direct-to-Consumer and International segment ....").

<sup>18</sup> DCP and DI became, together, Disney Consumer Products & Interactive (DCPI). Dep. of Janet Bundryck Burnley ("Burnley Dep.") 99:11-103:7, Jan. 27, 2023.

<sup>19</sup> DCPI was combined with WDPR, and it became Disney Parks, Experiences & Consumer Products ("DPEP"). *Id.*

<sup>20</sup> Direct to Consumer & International ("DTCI"). *Id.*

<sup>21</sup> <https://thewaltdisneycompany.com/the-walt-disney-company-announces-strategic-reorganization-of-its-media-and-entertainment-businesses-2/> (last visited June 23, 2023).

<sup>22</sup> <https://thewaltdisneycompany.com/the-walt-disney-company-announces-strategic-restructuring-restoring-accountability-to-creative-businesses/> ("Effective immediately, the company will be organized into three core, collaborative business segments: Disney Entertainment, ESPN, and Disney Parks, Experiences and Products.") (last visited June 23, 2023); Pate Dep. 19:23-21:1, 22:21-24.

<sup>23</sup> Ex. 788 to the Dep. of Dimitrios "Jim" Lygopoulos ("Lygopoulos Dep."), Mar. 3, 2023, Jayne Parker, Senior Executive Vice President and Chief Human Resources Officer, at 1

<sup>24</sup> TWDC HR ORG Structure, DISNEY-000005262.

<sup>25</sup> See, e.g., TWDC HR Org Structure, DISNEY-000005262; Studio Human Resources Executive Summary, DISNEY-000004013; DGE Senior HR Leadership, DISNEY-000031966 at 31967; Walt Disney Television, Human Resources, Top Line Executive Team; DISNEY-000022959; Ex. 852 to the Pate Dep., Organizational Structure – DTCI Human Resources, at 2.

<sup>26</sup> See DISNEY-000032389; Dep. of Mark Larson ("Larson Dep.") 32:12–23, 39:22-40:25, Feb. 22 & 23, 2023; Dep. of Julee Nagao ("Nagao Dep.") 35:4-9, Apr. 18, 2023.

while Segment Compensation teams implement Disney’s compensation system within each segment.<sup>27</sup> Disney’s CHRO, in 2013, “led an initiative to harmonize compensation and benefit programs across the Company to promote efficient movement of talent within the Company.”<sup>28</sup>

Although Disney has changed its Segments, Disney has had a consistent job architecture and overarching strategy for classifying jobs across its business units companywide, including its “Global Leveling Framework,” which is a “[c]onsistent framework to organize roles.”<sup>29</sup> Since starting to implement the Global Leveling Framework in 2014, Disney’s job architecture has been foundational to how it compares jobs and determines employee compensation.<sup>30</sup> It is also foundational to other Disney HR management systems and practices including recruitment and selection, transfers, promotions, and career development and planning.

Disney’s companywide pay philosophy, its “Total Rewards Philosophy,” applies to “each candidate and employee” and has included the following goals over time: “attract, motivate and retain top talent,” “align to the goals and objectives of The Walt Disney Company,” and “enable movement across the Company.”<sup>31</sup> Its trainings for HR employees and guides for its annual

---

<sup>27</sup> See Understanding Pay at Disney – HR Training Modules, DISNEY-31566 at 31574; Dep. of Kara Anderson (“Anderson Dep.”) 67:16-68:7, Dec. 20, 2022.

<sup>28</sup> Ex. 787 to the Lygopoulos Dep., The Walt Disney Company; Notice of 2014 Annual Meeting and Proxy Statement, at 40.

<sup>29</sup> Understanding Pay at Disney – HR Training Modules, DISNEY-31566 at 31577.

<sup>30</sup> Job leveling & MIBP Eligibility Update, Senior HR Leaders, July 14, 2015, DISNEY-000005790 at 5791 (“In FY14 we introduced an overarching global framework to identify job levels, and serve as the *common* language to clearly distinguish like-job roles across the Company and drive consistent program eligibility.”); Understanding Pay at Disney – HR Training Modules, DISNEY-000031566 at 31581; DISNEY-000021916 at 21922 (“Job levels equip us with a common set of criteria (based on standard job competencies such as functional knowledge, business expertise, leadership, problem-solving, business impact and interpersonal skills) upon which we can identify like-jobs across the Enterprise.”); *id.* (“By having a common framework with which to compare, we are able to drive consistent eligibility for our total rewards programs, support career progression for our employees and facilitate integrated talent management and learning efforts for the future.”).

<sup>31</sup> The Walt Disney Company Compensation Guidelines & Accountabilities, May 22, 2018, DISNEY-000032863 at 32866; *see also, e.g.*, TWDC Talent Acquisition, DISNEY-000041675; Compensation Education Module 1, DISNEY-000032927 at 32936.

compensation planning repeatedly underscore its goal of “enabl[ing] employee mobility across segments.”<sup>32</sup> Disney’s pay philosophy, “is developed with the enterprise in mind” and with the goal of “hav[ing] a consistent approach across all business units.”<sup>33</sup>

Part of attracting, motivating, and retaining top talent includes internal and external pay equity, and this also was an important part of Disney’s goals. As Disney states: “Our pay philosophy is to attract, retain and develop employees with the talent and skills needed to meet our Company objectives. We do this by paying our workforce within a competitive range for the role, providing pay awards that recognize the contributions individuals make and the successes we achieve together, while balancing internal equity.”<sup>34</sup> Expanding upon these goals, Disney stated that it designed its compensation programs to “position us as an **employer of choice** to secure talent in a competitive market.”<sup>35</sup>

These goals created an incentive for Disney to apply a consistent global compensation philosophy and job leveling framework to its jobs across the enterprise to facilitate movement of human talent across its businesses as well as external and internal pay equity. By facilitating cross-segment employee mobility through its uniform job architecture, Disney has sought to provide career opportunities and growth to employees to enhance retention of talent. To enable such employee mobility across its businesses, Disney created consistent compensation programs and a consistent, companywide strategy for classifying and evaluating jobs.

---

<sup>32</sup> The Walt Disney Company Compensation Guidelines & Accountabilities, May 22, 2018, DISNEY-000032863 at 32866; *see also, e.g.*, TWDC Talent Acquisition, DISNEY-000041675; Compensation Education Module 1, DISNEY-000032927 at 32936 & 32983; Leader Guide Annual Compensation Planning General Overview for the 2017 Planning Cycle, DISNEY-000022372 at 22373; Leader Guide Annual Compensation Planning General Overview for the 2019 Planning Cycle, DISNEY-000024607 at 24608.

<sup>33</sup> Understanding Pay at Disney – HR Training Modules, DISNEY-000031566 at 31571.

<sup>34</sup> Understanding Pay at Disney – HR Training Modules, DISNEY-000031566 at 31571; *see also* Compensation Education Module 1, DISNEY-000032927 at 32936 & 32983.

<sup>35</sup> DISNEY-000031572 (emphasis in original); *see also* Global Job Leveling: Leader Reference Guide, DISNEY-000031217 at 31237.

To operationalize these goals, in 2013, Disney’s Chief Human Resources Officer “led an initiative to harmonize compensation and benefit programs across the Company to promote efficient movement of talent within the Company.”<sup>36</sup> Disney tasks segment “compensation leaders” with “implement[ing]our approach within their respective business units.”<sup>37</sup> This strategy comes from “Eric Chaisson, who is a part of Corporate Compensation in consultation with the Segment Compensation leaders, as well as the heads of HR at the segments.”<sup>38</sup> Disney continues to have “a centralized Compensation model with [a] Company-wide global strategy.”<sup>39</sup>

In short, Disney’s “enterprise-wide approach to pay” seeks “to have a consistent approach to pay across our business segments . . . This consistency enhances the employee experience by ensuring they are paid fairly in comparison to those doing **substantially similar** work across the enterprise and enabling them to identify opportunities across the enterprise for career progression.”<sup>40</sup>

A central component of Disney’s “consistent global job leveling framework, pay structure, and incentive targets”<sup>41</sup> is its categorization of jobs into Job Levels and Job Families. This provided the structure to facilitate achievement of its goals of a consistent pay policy across its businesses to enable employee mobility across its businesses, and internal and external pay equity.

---

<sup>36</sup> Ex. 787 to the Lygopoulos Dep. , Notice of 2014 Annual Meeting and Proxy Statement at 34.

<sup>37</sup> Anderson Dep. 280:12-15.

<sup>38</sup> *Id.*

<sup>39</sup> DMED Compensation Training for TA New Hires, Updated August 2022, DISNEY-000031614 at 31619.

<sup>40</sup> Workday Compensation Planning Tool: 2022 HRBP Overview, DISNEY-000035478 at 35496. (Emphasis added.)

<sup>41</sup> DISNEY-000031484 at 31490.

## 2. The Four Components of Disney's Job Architecture

Disney “defines how functions, families, career bands and levels align in a systemic way to organize jobs across the Company.”<sup>42</sup> These are the four components of Disney’s job architecture: a) Career Bands; b) Job Levels; c) Job Functions, and d) Job Families.<sup>43</sup> Job Levels and Job Families provide more specific identification than, respectively, Bands and Job Functions. Together, Job Levels and Job Families provide detailed information about job activities and tasks performed, the skills, abilities, knowledge, education, experience, and competencies required to perform the specific job activities, and the level of authority, effort, complexity, and scope of the work. Taken altogether, the combined Job Level and Job Family information is the type of information at the level of specificity that I-O Psychologists examine when conducting work/job analysis for HR management decision making, including pay.

### (i) Career Bands and Job Levels (Classifying by Level of Work)

Disney’s “Global Job Leveling Framework is a way to organize jobs across the company.”<sup>44</sup> The Global Job Leveling Framework thus shows “how the Company thinks about jobs, and the skills and behaviors needed to perform jobs effectively ...”<sup>45</sup> It distinguishes jobs in terms of the level of work (differentiated according to Career Band and then more specific Job Levels). Figure 1, below, shows Disney’s graphic portrayal of its Global Job Leveling Framework.

---

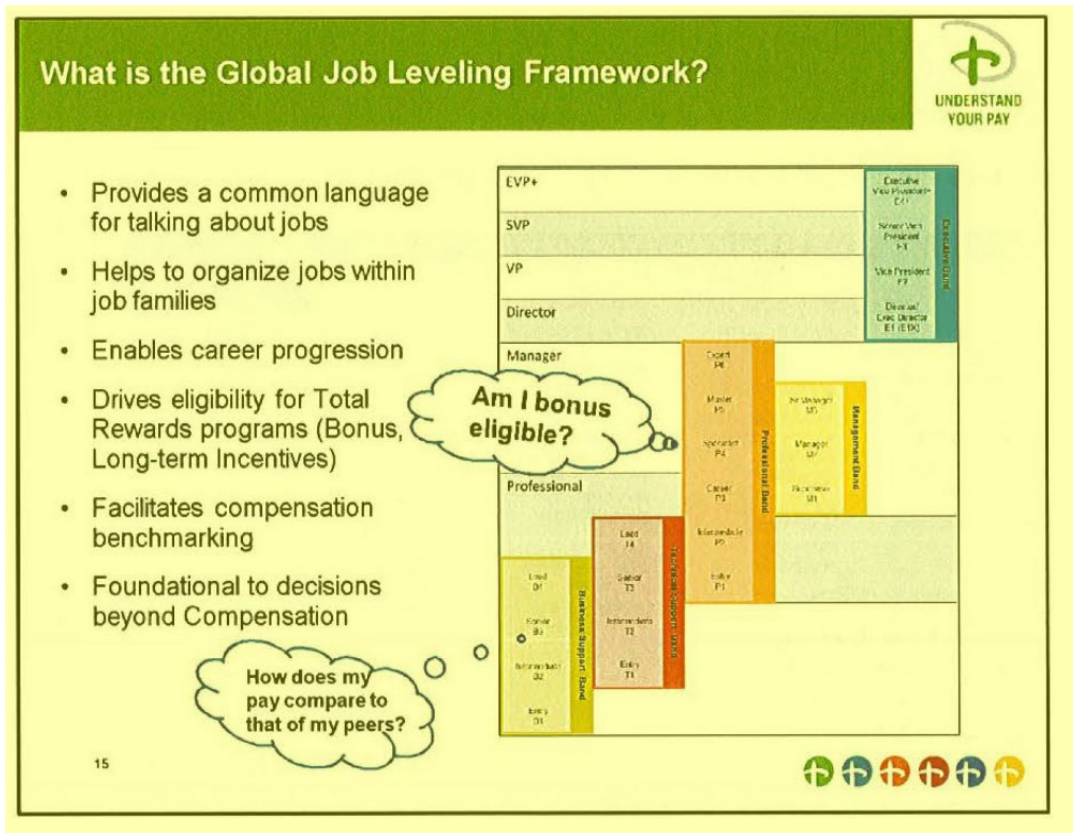
<sup>42</sup> DISNEY-000035478 at 35497.

<sup>43</sup> Workday Compensation Planning TOOL: 2022 Leader Overview, DISNEY-000031484 at 31491; Compensation Education Module 1, DISNEY-000032927 at 32981; Disney Vista: Job Families, December 2, 2019; DISNEY-000023513 at 23522; TWDC Job Function and Job Families, Policy and Guidelines, Content Owner: Mark Larson, Enterprise Comp, Last Reviewed 23 June 2017, DISNEY-000031317.

<sup>44</sup> Understanding Pay at Disney – HR Training Modules, DISNEY-000031566 at 31583.

<sup>45</sup> TWDC Global Job Leveling – For HR Professionals, DISNEY-000031267 at 31269.

**Figure 1: Disney's Overview of its Global Job Leveling Framework<sup>46</sup>**



**Career Bands** “classify the type of work performed, each representing a broad grouping of high-level job characteristics and responsibilities.”<sup>47</sup> Disney has used Career Bands, including Business Support Band, Technical Support Band, Professional Band, Management Band,

<sup>46</sup> Compensation Education Module 1, DISNEY-000032927 at 32942.

<sup>47</sup> Understanding Pay at Disney – HR Training Modules, DISNEY-000031566 at 31583.

Attorney Band, and Executive Band. Figure 2, below, provides broad definitions of the roles in each of the five Disney Career Bands.<sup>48</sup> Each Band contains Job Levels.<sup>49</sup>

**Figure 2: Characteristics of Career Bands<sup>50</sup>**

## Job Level Bands

**UNDERSTAND  
YOUR PAY**

Job Levels are grouped into Bands. Within a Band, jobs have similar characteristics.

Characteristics of Roles in Each Career Band				
Business Support	Technical Support	Professional/Expert	Management	Executive
<ul style="list-style-type: none"> <li>• Performs clerical or administrative work</li> <li>• Uses administrative, data organizing and coordination skills to complete work</li> <li>• Performs duties according to established procedures</li> </ul>	<ul style="list-style-type: none"> <li>• Performs technical work, often in support of professional roles</li> <li>• Requires vocational training or the equivalent experience</li> <li>• Performs duties according to established procedures</li> </ul>	<ul style="list-style-type: none"> <li>• Applies a theoretical knowledge-base to work to achieve goals through own work</li> <li>• Characterized by specific functional expertise typically gained through formal education</li> <li>• May provide guidance to others as a project manager using technical expertise</li> </ul>	<ul style="list-style-type: none"> <li>• Achieves goals through the work of others</li> <li>• Management responsibilities include performance appraisals, pay reviews, training and development</li> <li>• Job focus is on managing others and applying operational or strategic management skills</li> <li>• Management responsibility for meaningful internal or external workforce</li> </ul>	<ul style="list-style-type: none"> <li>• Sets the strategic direction for the company</li> <li>• Takes an enterprise-wide perspective</li> </ul>

14

Confidential DISNEY-00005684

<sup>48</sup> See, e.g., DISNEY-000031403 at 31421 (“The Attorney Band is an additional band within the [Global Job Leveling] framework that is designed exclusively with practicing attorneys within the Company.”)

<sup>49</sup> There are four Job Levels within the Business Support Band, four Job Levels within the Technical Support Band, six Job Levels within the Professional Band, three Job Levels within the Management Band, and four Job Levels within the Executive Career Band.

<sup>50</sup> Disney Compensation Education Module 1 – Global Job Leveling Framework, DISNEY-00005671 at 5684.

**Job Levels** are “defined by the specific behaviors and skills required to perform various jobs.”<sup>51</sup> “Every position is assigned to one of these Job Levels, regardless of business, geography or job title.”<sup>52</sup> The Global Framework Job Levels, Bands, and their definitions are used enterprise wide.<sup>53</sup>

To identify the Job Level, Disney uses a set of detailed criteria to specifically differentiate jobs within each Career Band. Tables 2-6 (which appear at the end of the body of this report, at pages 47-59) show the specific criteria that define each factor used to determine if a job fits within a Job Level within each Career Band.<sup>54</sup>

For each of the following factors, there are specific and detailed criteria:

- General Profile.
- Leadership,

---

<sup>51</sup> DISNEY-000031566 at 31583.

<sup>52</sup> DMED Leader Brief: Job Leveling and Harmonization, DISNEY-000029196-97 (emphasis in original); *See also* TWDC Global Job Leveling – For HR Professionals, DISNEY-000031267 at 31273; Job Leveling Update: HRBP Community of Practice, April 16, 2015, DISNEY-000005778-83 (giving a broad overview of the steps taken to develop job levels); 2015 Leveling Communications, DISNEY-000021916 at 21922 (“The Walt Disney Company has been reviewing jobs across the Enterprise” to implement job levels, and describing two phases of implementation of leveling.).

<sup>53</sup> DISNEY-000021916 at 21922 (“Job levels equip us with a common set of criteria (based on standard job competencies such as functional knowledge, business expertise, leadership, problem-solving, business impact and interpersonal skills) upon which we can identify like-jobs across the Enterprise.”).

<sup>54</sup> DISNEY-000031267 at 31277 (“Every Job Level has specific requirements, which you’ll hear referred to as ‘specific criteria’ in HR.”). Table 2 shows the definitions/criteria for each of the 4 Job Levels within the Business Support Band; Table 3 shows the definitions/criteria for each of the 4 Job Levels within the Technical Support Band; Table 4 shows the definitions/criteria for each of the 6 Job Levels within the Professional Band; Table 5 shows the definitions/criteria for each of the 3 Job Levels within the Management Band, and Table 6 shows the definitions/criteria for each of the 4 Job Levels within the Executive Band. Table 7 shows the Attorney Band, as well as a Band, Frontline Operational Jobs, not included in the proposed class.

- Business Expertise,
- Functional Knowledge,
- Problem Solving,
- Business Impact, and
- Interpersonal Skills.

These definitions provide standard criteria for evaluating a job to determine its Job Level in Disney’s structure of jobs. Job Levels differentiate jobs in terms of responsibility, complexity, discretionary authority, decision making, and scope of the job.

(ii) Job Functions and Job Families (Classifying by Type of Work)

**Job Functions** are broad groupings of jobs that use “similar skills and knowledge to accomplish work and deliver a specific type of expertise.”<sup>55</sup> They are major categories of job disciplines like Finance, Human Resources, Technology, for example.<sup>56</sup> Table 8 (which appears at the end of the body of this report, at page 61) provides a sample of Disney’s Job Functions.

**Job Families** are embedded within Job Functions and consist of jobs that require specific skills and abilities to perform highly similar kinds of work. Disney defines Job Families as “a specific discipline of work within a broader job function.”<sup>57</sup> Job Family is foundational for compensation: according to Disney, it “[d]efines the nature of the work being performed for purposes of benchmarking to the external market.”<sup>58</sup> Disney has designated some of its Job

<sup>55</sup> Understanding Pay at Disney – HR Training Modules, DISNEY-000031566 at 31583.

<sup>56</sup> Disney Compensation Education Module 1 – Global Job Leveling Framework, DISNEY-000032927 at 32981. TWDC Job Functions and Job Families, DISNEY-000031317.

<sup>57</sup> Disney Compensation Education Module 1 – Global Job Leveling Framework, DISNEY-000032927 at 32981; Anderson Dep. 74:12-21 (confirming this definition of job families); *see also* TWDC Job Functions and Job Families, Disney-000031317. *See also* Understanding Pay at Disney – HR Training Modules, DISNEY-000031566 at 31577; Compensation Education Modules, DISNEY-000032939; TWDC Job Functions and Job Families, DISNEY-000031317.

<sup>58</sup> TWDC Job Functions and Job Families, DISNEY-000031317 at 31318; Anderson Dep. 89:12-90:2 (corroborating that Job Family is an important element for determining the salary range and hiring range of a given job).

Families as “Functional,” which is not the same as “Job Function.”<sup>59</sup> These include finance, HR, and Technology.

Disney maintains descriptions of its job families in at least one location, which has been referred to as a “master job family list.”<sup>60</sup> If the type of work changes, new Job Families can be and are created as needed to ensure similarity of jobs within each Job Family.<sup>61</sup> When Disney slots an existing job into a newly created Job Family, it does not change the substance of the job itself. See Section V.E., *infra*.

### 3. Job Family/Job Level Composites

Disney has used the combination of Job Family and Job Level to group jobs: as Disney states, “we use our job families and job levels to **group jobs** ...”<sup>62</sup> When both Job Level and Job Family are jointly considered, there is significant specificity about the jobs and their requirements. That is, based on the specific criteria of Job Level in combination with the Job Family’s description of the type of work provides specific, detailed information about the skills, effort, and responsibility of jobs within a *Job Family/Job Level Composite*. It is the kind of information and level of specificity that I-O Psychologists use to assess job similarity. Thus, after identifying the Job Level, the identification of Job Family means Disney has “group[ed] jobs based on the nature and level of work.”<sup>63</sup>

As described below, Disney’s study of its jobs was significant and comprehensive, and it resulted in the identification of groups of jobs i.e., Job Family/Job Level Composites, with substantially the same work. Disney documents describe the skills, abilities, duties, complexity, effort, and responsibilities of Job Family/Level Composites. One such document is the “Media

---

<sup>59</sup> Compensation Education Module 1, Disney-000005671 at 5699; 2019 Annual Market Assessment (AMA), DISNEY-000022887 at 22888; Anderson Dep. 119:2-22.

<sup>60</sup> DISNEY-000031317 at 31320; DISNEY-000023525 at 23529.

<sup>61</sup> DISNEY-000023513 at 23517. DISNEY-000029162 at 29164 & 29172.

<sup>62</sup> DISNEY-000031566 at 31587 (emphasis in original).

<sup>63</sup> DISNEY-000031566 at 31577.

Delivery” Job Family is shown in Table 10 (which appears at the end of the body of this report, at page 64-70). The information provided is specific to each Job Family/Job Level Composite in the Media Delivery – QC Managers and Media Delivery – QC Technician Job Families.<sup>64</sup> In a document from Enterprise Compensation, it describes how Disney describes jobs based on organizational structure, supervisory scope, department/group description, responsibilities and duties, job summary and purpose, project/budget responsibility, task assignment, and decision making.<sup>65</sup> Disney used standard templates to develop Job Family/Job Level composites, including its Job Family Framework Tool.<sup>66</sup> Disney subject matter experts<sup>67</sup> gathered the information Disney used for completing these composites, and Disney subject matter experts continue to refine and update them as well as create new job families and retire others.<sup>68</sup>

---

<sup>64</sup> See also, e.g., DISNEY-000038941 (Enterprise Social Responsibility Job Family Framework); DISNEY-000038985 DISNEY-000038912; DISNEY-000039051.

<sup>65</sup> DISNEY-000041288-89 (“This detailed information directly enables the Compensation team to appropriately determine: the level of the job, including how it fits in the broader job family and/or compares to similar roles ....”).

<sup>66</sup> JFF Tool, DISNEY-000041100, a spreadsheet collecting information on Job Family and Job Levels includes information describing skills, abilities, duties, complexity, effort, and responsibilities of Job Family/Level Composites. Among the strategic priorities Compensation drafted in 2016 was to “develop consistent template and approach for job family grids supported by the leveling work (FY18).” DISNEY-000039200 at 32910.

<sup>67</sup> Disney identified HR Business Partners (HRBPs) as its subject matter experts, persons very knowledgeable about the work performed and the work requirements of the job. See Dep. of Janet Temple (“Temple Dep.”) 97:12-22, Feb. 7, 2003 (to determine “job-related factors such as knowledge, skills, and experience,” compensation professionals gathered the information from HRBPs); 137:10-138:1 (HRBPs know “the job responsibilities for a given role.”); DISNEY-000032988 at 33013 (“It is important that HRBPs communicate to Compensation when a MIBP-eligible individual decreases scope and/or direct reports as this may impact their MIBP eligibility.”).

<sup>68</sup> Enterprise Compensation: Calendar 2020 Priorities DISNEY-000033988 (describing “Ongoing Journey to Cross-Segment Consistency & Calibration) including “Job Families” and “Levels.”); Temple Dep. 150:23-151:9 (testifying that job family work “has been ongoing,” “it continues to evolve” and “there’s not a specific end date to looking at job families. It’s an ongoing activity” and in order to maintain job families, they “need to continue to work on it.”)

Such documents define expectations and requirements for each step in the career ladder of a job family.<sup>69</sup> The information is specific, detailed, and comprehensive.<sup>70</sup> They set forth information about duties, tasks, activities, knowledge, skills, abilities, competencies, experience, and education required to perform the work in each step in the career ladder of a Job Family. The documents describe job scope and span of control, decision making and impact, work complexity and problem solving, communications and customer service relationships, education and experience and responsibilities, business expertise, and leadership requirements. These documents thus further indicate Disney has taken significant steps to ensure that its descriptions of Job Family/Level Composites are accurate.<sup>71</sup>

Jobs within a Job Family/Job Level Composite are highly similar – substantially similar – in terms of the nature of the work (duties, tasks, activities), requirements to perform that work (skills, abilities, knowledge, experience, education), level of responsibility of the work (scope, discretionary decision-making authority, expertise, complexity), and effort. The information is entirely job related. This is the kind of information and detail that I-O Psychologists use to conduct job analyses, assess job similarity, and classify jobs to form groups of substantially similar jobs. Disney’s information for Job Family/Job Level Composites is sufficiently specific

---

<sup>69</sup> Some examples include: DISNEY-000038536; DISNEY-000038538; DISNEY-000038539; DISNEY-000038540; DISNEY-000038541; DISNEY-000038544; DISNEY-000038546; DISNEY-000038547; DISNEY-000038548; DISNEY-000038549; DISNEY-000038631; DISNEY-0038642; DISNEY-000038736; DISNEY-000038831; DISNEY-000038986; DISNEY-000038987; DISNEY-000038989; DISNEY-000038999; DISNEY-000039009; DISNEY-000039026; DISNEY-000039037; DISNEY-000039052; DISNEY-000039053; DISNEY-000040994; DISNEY-000041005; DISNEY-000041018; DISNEY-000041029; DISNEY-000041051; DISNEY-000041108.

<sup>70</sup> In Disney’s words as well, the “Global Job Leveling Framework contains specific criteria for every Job Level” (DISNEY-000031237). The effort to create the Global Job Leveling Framework was “comprehensive.”

<sup>71</sup> See DISNEY-000023513 at 23514, 23517-20 (training on cross-segment job family work with compensation employees from each Segment); DISNEY-000023525-30; Temple Dep. 199:7-201:23 (compensation gatekeeper assigned to families that was similar to the job family work around for Project Vista). DISNEY-000041182 at 41185 (Functional Hiring Ranges, Job Code Cleanup & Salary Structure, May 18, 2017).

and comprehensive that Disney uses it to assign pay ranges.<sup>72</sup> That is, Disney sets its pay grades/pay ranges for Job Families within Job Levels.

Information related to all four components of Disney’s job architecture – Job Functions, Job Families, Career Bands, and Job Levels – is incorporated into the Job Family/Job Level Composite. The information is entirely job related and can provide the basis for valid classification into groups of highly similar – substantially similar – jobs in terms of skills, effort, and responsibilities. Furthermore, Disney’s Job Family/Job Level Composites are fundamental to Disney’s implementation of its HR management policies and practices.

#### **D. Disney’s Companywide Development and Implementation of its Job Architecture**

In 2014-2015, Disney introduced its Global Job Leveling Framework across the company.<sup>73</sup> The global framework was a comprehensive, companywide effort involving many subject matter experts<sup>74</sup> who devoted considerable time, energy, and effort. This included, after the initial slotting of the jobs into Job Levels, numerous rounds of calibration to “ensure consistency” among all the jobs leveled.<sup>75</sup> High-level HR employees and outside consultants from Willis Towers Watson helped create the Framework.<sup>76</sup> High-level HR employees, including the Senior Vice President of Compensation, Benefits, and HRIS, were “in charge” of

---

<sup>72</sup> Disney Compensation Education Module 1 – Benchmarking, DISNEY-000032927 at 32966-7.

<sup>73</sup> DISNEY-000005784 at 5798 (Framework “introduced globally across TWDC (excluding union and contingent employees) in two Phases over FY14 and FY15.”)

<sup>74</sup> *Supra* fn. 67.

<sup>75</sup> DISNEY-000005778 at 5782 (“Once initial slotting is completed by Segments, an initial round of ‘calibration’ is conducted by workstream ... Additional rounds of calibration will occur in May/June to ensure consistency across the Phase 2 workstreams and against jobs leveled in Phase 1.”).

<sup>76</sup> *See* Larson Dep. 331:11-25. Willis Towers Watson is a consulting firm that provides compensation, job architecture, job evaluation, job leveling services among many other management consulting services to its clients. <https://www.wtwco.com/en-us/solutions/compensation-strategy-and-design> (last visited June 23, 2023).

the global-leveling project,<sup>77</sup> and compensation leaders from each of the Segments helped manage the project.<sup>78</sup> Many Disney employees across the company were involved in the implementation of Disney’s job architecture.

In training and presentations for senior leaders, Disney repeatedly and over time underscored the centrality of its companywide job architecture. In its Job Leveling & MIBP Eligibility Update in July 2015 to Senior HR leaders, Disney states it “introduced an overarching global framework to identify job levels, serve as the *common language* to clearly distinguish like-job roles across the Company and drive consistent program eligibility.”<sup>79</sup> The Senior HR leaders were told there would be “a governance process, including regular audits, to ensure consistent application, data quality and sustainability of the job levels.”<sup>80</sup> And there would be “Educational materials for broader HR community (focusing on HRBPs and Talent Acquisition) on the global job leveling framework so that we are consistent in how we talk about it and so they can incorporate it into their business processes.”<sup>81</sup>

Disney developed such trainings, including, for example, its “Compensation Education Module 1.”<sup>82</sup> This training was created and delivered by employees in Enterprise Compensation.<sup>83</sup> Enterprise Compensation designs enterprise-wide pay programs which

---

<sup>77</sup> Dep. of NaShawn Bacon (“Bacon Dep.”) 256:10-17, Jan. 24, 2023.

<sup>78</sup> Burnley Dep. 95:7-16. Disney documents (dated 2015) corroborate that the “Phase II Leveling project” was also “directed by Enterprise” and that Walt Disney Parks and Resorts (now DPEP, Disney Parks, Entertainment, and Products) would “continue to partner with the Enterprise Compensation team” for leveling issues and questions. DISNEY-000022827 at 22828-29 (2015 CAP Sustainment).

<sup>79</sup> DISNEY-000005790 at 5791 (emphasis in original).

<sup>80</sup> DISNEY-000005790 at 5797.

<sup>81</sup> DISNEY-000005790 at 5797.

<sup>82</sup> Compensation Education Module 1, DISNEY-000032988.

<sup>83</sup> DISNEY-000032926 at 32926-28; DISNEY-000033338; DISNEY-000031699 at 31699-31700.

Segment Compensation Teams implement.<sup>84</sup> It described the importance of the Global Job Leveling Framework and job families, how the framework is foundational to compensation and other decisions, and the Framework's specific criteria.<sup>85</sup>

There have been trainings for HR employees across the company, such as "Understanding Pay at Disney – HR Training Modules."<sup>86</sup> Disney's Enterprise and Executive compensation employees directed the creation of, reviewed, and approved this training.<sup>87</sup> It was provided to all Disney HR compensation, HR business partners, employee relations, and talent acquisition employees.<sup>88</sup> "This presentation is intended to be consumed by our HR team members once a year, to stay up-to-date on our approach to pay," and "new HR employees should watch this presentation during onboarding for an introduction to our approach to pay."<sup>89</sup> Enterprise compensation, as well as Disney's Learning Center of Excellence, developed a "Global Job Leveling Video."<sup>90</sup> Like Compensation Education Module 1, these trainings describe the Global Leveling Framework and Job Families, their application, and their importance for setting pay.<sup>91</sup> The "[j]ob leveling framework was introduced globally across

---

<sup>84</sup> Understanding Pay at Disney – HR Training Modules, DISNEY-000031566 at 31574.

<sup>85</sup> See e.g., DISNEY-000032927 at 32942-48.

<sup>86</sup> DISNEY-000031566-613; DISNEY-000035470 ("Understanding Pay at Disney (aka, Comp 101)").

<sup>87</sup> DISNEY-000035418.

<sup>88</sup> DISNEY-000032288 at 32297.

<sup>89</sup> DISNEY-000031566 at 31567.

<sup>90</sup> DISNEY-000033111 at 33124 (in a 2018 document authored by Enterprise Compensation titled, "Compensation Guidelines & Accountabilities," lists "Global Job Leveling Video – co-developed by Enterprise Compensation, Total Rewards Communications and Enterprise Learning COE"); see also DISNEY-000031267 (audio script with storyboard for "TWDC Global Job Leveling – for HR Professionals").

<sup>91</sup> See e.g., DISNEY-000031566 at 31577, 31583-84, 31587; DISNEY-000031267 at 31269, 31271, 31273-85.

TWDC (excluding union and contingent employees) in two Phases over FY14 and FY15.”<sup>92</sup> Business leader presentations state that Phase 1, which was completed in 2014, involved leveling 15,000 individuals (4,000 jobs) within the Finance, Supply Chain, Strategy, Business Technology, HR, Labor Relations, Security and Legal job functions. In Phase 2, an additional 43,000 individuals (8,000 jobs) were leveled within PR/Communications, Buying/Merchandising/Content Planning, Commercial, Sales/marketing, Operations, Creative and Business Support jobs.<sup>93</sup> The initial slotting of jobs into the framework was done by the segments, followed by several rounds of “calibration” to “ensure consistency across the Phase 2 workstreams and against jobs leveled in Phase 1.”<sup>94</sup> By late summer 2015 (approximately), Disney had applied the Global Job Leveling Framework to 58,000 employees in 12,000 roles across the company.<sup>95</sup>

Several Disney employees confirmed what Disney’s documents show – that Disney used the Global Leveling Framework throughout the enterprise. For example, Kara Anderson testified during her deposition that “We use the same leveling structure [across segments].”<sup>96</sup> She also testified that “the general framework is available for all of the segments to use.”<sup>97</sup> Bacon confirmed the global framework applies to nonunion jobs at Studios, except for Pixar (which is excluded from the Class definition).<sup>98</sup> Janet Temple confirmed that the framework applies to

---

<sup>92</sup> Disney’s Job Leveling & MIBP Eligibility Update: July 14, 2015, Senior HR Leaders, DISNEY-000005790 at 5798. *See also* DISNEY-000021916 at 21922 (Disney’s 2015 *Leveling Communications*.); NaShawn Bacon, VP of Compensation for Studios confirmed the timing of the Disney Global Job Leveling Framework project. Bacon Dep. 256:10-17.

<sup>93</sup> Disney’s Job Leveling & MIBP Eligibility Update: July 14, 2015, Senior HR Leaders, DISNEY-000005790 at 5791.

<sup>94</sup> Job Leveling Update: HRBP Community of Practice; April 16, 2015, DISNEY-000005782 . *See also* Global Job Leveling Update HR COE COP TEAM, May 7, 2015, DISNEY-000005784.

<sup>95</sup> Disney’s Job Leveling & MIBP Eligibility Update: July 14, 2015, Senior HR Leaders, DISNEY-000005790 at 5798.

<sup>96</sup> Anderson Dep. 113:21-114:20.

<sup>97</sup> Anderson Dep. 118:22-119:10.

<sup>98</sup> Bacon Dep. 154:13-155:22.

DGE and DATG.<sup>99</sup> Ibelka Fernandez confirmed the framework applies to DMED.<sup>100</sup> Mark Larson, testifying on behalf of Enterprise Compensation, stated: “In my experience, we work to map all jobs to the framework.”<sup>101</sup> The same leveling criteria were used across the company.<sup>102</sup>

In short, Disney created a Global Job Leveling Framework by providing a uniform methodology to classify jobs into a job architecture or structure of bands and levels using specific and consistent criteria throughout the company. Based on Disney documents and deposition testimony, the overall project, including the framework and guidance, was coordinated and overseen at the Enterprise-level and with segment leaders’ involvement.

#### **E. Continual Updating of Disney’s Job Architecture to Ensure Accuracy of Job Classifications**

Disney’s maintenance, calibration and review activities for its job architecture indicate efforts towards standardization and consistency across Disney segments. After implementing its Global Job Leveling Framework, Disney sought to “[f]ormalize governance policies to ensure the work doesn’t immediately ‘unravel.’”<sup>103</sup> Disney also developed “educational materials for [the] broader HR community (focusing on HRBPs and Talent Acquisition) on the global job

---

<sup>99</sup> Temple Dep. 153:7-9.

<sup>100</sup> Dep. of Ibelka Fernandez (“Fernandez Dep.”) 135:2-136:24, Jan. 18, 2023.

<sup>101</sup> Larson Dep. 338:7-14.

<sup>102</sup> DISNEY-000021916 at 21922 (“The Walt Disney Company has been reviewing jobs across the Enterprise against a newly defined global framework, known as job levels. Job levels define roles in relation to each other and the structure of our organization.”). These leveling criteria were applied to jobs in the various segments. *See, e.g.*, DISNEY-000024281 at 24283 (“leveling criteria” applied to DATG segment); DISNEY-000024311 at 24313 (“leveling criteria” applied to WDPR segment); DISNEY-0000 24275 at 24277 (“leveling criteria” applied to Corporate segment); DISNEY-000022028 at 22030 (“leveling criteria” applied to Studios segment); DISNEY-000024285 at 24287 (“leveling criteria” applied to DCP segment); DISNEY-000024291 at 24293 (“leveling criteria” applied to DI segment); *See* Anderson Dep. 113:21-114:20 (“We use the same leveling structure [across segments].”).

<sup>103</sup> Job Leveling Update: HRBP Community of Practice, April 16, 2015, DISNEY-000005778 at 5782; Job Leveling & MIBP Eligibility Update, July 14, 2015, Sr. HR Leaders, DISNEY-000005784 at 5797 (“Define and implement a governance process, including regular audits, to ensure consistent application, data quality and sustainability of the job levels.”).

leveling framework so that we are consistent in how we talk about it and so they can incorporate it into their business processes.”<sup>104</sup> Disney continues to maintain its job architecture, and it seeks to ensure changes in the type of work remain current, thus ensuring a) substantial similarity of jobs within the Job Family/Job Level Composites, and b) accuracy of its global job architecture.<sup>105</sup>

Around the time Disney was completing implementation of its Global Job Leveling Framework, Disney initiated a pilot project: “[W]ith the formation of consistent job families and ranges across TWDC (US) we are revisiting some past decisions...” to “manage pay equity with current employees.”<sup>106</sup> Not much later, Enterprise compensation created a “TWDC Job Functions and Job Families” policy.<sup>107</sup> As Disney identified job families, that, in combination with the job level identified, revealed those jobs with substantially similar work.

Disney’s calibration project, Project Vista, was launched in 2019, and included a comprehensive review of job families that was prompted by Disney’s transition from the SAP to Workday (human resource data management software systems).<sup>108</sup> It was a companywide

---

<sup>104</sup> Job Leveling & MIBP Eligibility Update, DISNEY-000005784 at 5797.

<sup>105</sup> Enterprise Compensation: Calendar 2020 Priorities DISNEY-000033988 (describing “Ongoing Journey to Cross-Segment Consistency & Calibration) including “Job Families” and “Levels.”); Temple Dep. 150:23-151:9 (testifying that job family work “has been ongoing,” “it continues to evolve” and “there’s not a specific end date to looking at job families. It’s an ongoing activity” and in order to maintain job families, they “need to continue to work on it.”); DISNEY-000041195 at 41199 & 202; DISNEY-000031317 at 31318; DISNEY-000038540; Burnley Dep. 120:7-121:22; Master Job Family List, Disney-000031352 (second sheet “Change Tracker”).

<sup>106</sup> DISNEY-000005526 at 5530 (an August 2016 document created by enterprise compensation).

<sup>107</sup> DISNEY-000031317; *see also* DISNEY-000023513 at 23517 (applying the same criteria as the TWDC Job Functions and Job Families policy to the cross-segment, enterprise-led identification and calibration of job families that was not limited to functional jobs).

<sup>108</sup> *See* DISNEY-000023513.

evaluation of all job families that included assigning talent markets<sup>109</sup> to each job family to ensure consistency and accuracy. According to Janet Burnley, who works in compensation and was designated as a witness for DPEP Compensation, "... it was more or less a cleanup effort and making sure that everything was classified properly."<sup>110</sup>

Project Vista was led by a team of representatives from HR and Compensation, including Julie Atwater from Enterprise Compensation.<sup>111</sup> Cross-segment teams were created for each job function.<sup>112</sup> A spreadsheet listing over 30 job functions identifies "team members" as well as "job family facilitators" and describes their roles and responsibilities.<sup>113</sup> Team members were tasked with "represent[ing] each Segment in the cross-segment conversation on a particular Job Family/Function."<sup>114</sup> Job Family Facilitators were designated the "First contact for questions/conversations about their designated Job Family(ies)."<sup>115</sup> Each Job Family Facilitator also "coordinates discussions/schedules meetings as needed; updates Enterprise Comp with any changes/modifications to job families."<sup>116</sup> Janet Temple confirmed the accuracy of these descriptions and her role in the project.<sup>117</sup>

The job family working groups were instructed to "review the list of job families for your area to identify redundancies (i.e., where two or more families should be consolidated) or where

---

<sup>109</sup> Talent markets are segments of the labor market in which employers compete for employees with specific skills, qualifications, and experience. Talent markets vary by factors such as industry, geography, size, organizational performance. Salary surveys are often provided for specific talent markets.

<sup>110</sup> Burnley Dep. 16:1-9; 118:6-8.

<sup>111</sup> Larson Dep. 263:2-267:6.

<sup>112</sup> Disney Vista – Job Families, December 2, 2019, DISNEY-000023513 at 23518.

<sup>113</sup> Segment Points of Contact by Job Family Group or Function, DISNEY-000032426.

<sup>114</sup> *Id.*

<sup>115</sup> *Id.*

<sup>116</sup> *Id.*

<sup>117</sup> Temple Dep. 71:7-72:18.

job families should be added, deleted or moved.”<sup>118</sup> They reviewed and revised, if needed, Talent Markets assigned to job families. They created new job families if more than one Talent Market applied; they updated, or created new descriptions of job families, captured the information in “templates,” and returned the completed templates to Enterprise Compensation.<sup>119</sup> In short, Disney subject matter experts ensured the classifications were accurate and job related – an important step that I-O Psychology conducted job analysis would include.

Similar to Disney’s implementation of its Global Job Leveling Framework, Project Vista was an enterprise-wide effort intended to ensure consistency and accuracy of the classification of Disney jobs. It involved evaluation of all job families and assigned talent markets to ensure consistency and accuracy across the enterprise.<sup>120</sup> After Project Vista was completed, Disney has continued to refine and update the classification of jobs within its job architecture.<sup>121</sup> Each Job Family has been assigned a gatekeeper who is a compensation employee and who has similar responsibilities as job family facilitators did in the Job Family Working Group. In short, Disney’s job architecture is being maintained such that, at any given time, the roles and jobs within each Job Family within each Job Level (Job Family/Job Level Composites) are substantially similar.

---

<sup>118</sup> Job Family and Talent Market Review, DISNEY-000023525 at 23526; Temple Dep. 91:9-93:22.

<sup>119</sup> See Job Family and Talent Market Review, DISNEY-000023525 at 23526 (“Use the job description to help differentiate”); Temple Dep. 97:12-22 (to determine “job-related factors such as knowledge, skills, and experience,” compensation professionals gathered the information from HRBPs); 137:10-138:1 (HRBPs know “the job responsibilities for a given role.”).

<sup>120</sup> Burnley, Dep.116:23-118:12.

<sup>121</sup> Temple Dep. 150:23-151:9 (job family work done as part of Vista continues; there is no end date to updating job families; it’s an ongoing activity).

## F. Disney's Job Architecture – Foundational for Disney's HR Management Systems, including Compensation

Disney's job architecture is how Disney organizes jobs in "a systematic way"<sup>122</sup> across its various businesses. It enables consistent management of Disney's human talent across its businesses. In Disney's words, Job Family and Job Level are "the foundation for compensation and talent management."<sup>123</sup> Thus, Disney jobs within a Job Family/Job Level Composite are treated similarly in terms of HR management practices regardless of where those jobs are located throughout Disney's business units.

### 1. Disney's Job Architecture Is Foundational for Compensation

The combination of Job Family and Job Level (Job Family/Job Level Composite) is critical to Disney's pay philosophy. The "combination of family and level," according to Disney, "[a]mong other things, ... helps drive how employees are paid."<sup>124</sup> Disney sets base pay and pay ranges for Job Families within Job Levels.<sup>125</sup> Disney determines the external, market-based "worth" of its jobs at the level of Job Family/Job Level Composites.

The combination of Job Family and Job Level determines pay grade/pay range: "Jobs in the same family and level will be in the same grade," with a pay range for each grade.<sup>126</sup> The combination of Job Family and Job Level also determines whether a job change, including across

---

<sup>122</sup> DISNEY-000035478 at 35497 ("The Walt Disney Company's pay programs are designed to recognize outstanding performance and develop versatile and talented employees who can grow and lead across our many businesses and geographic locations. The way we do this is by establishing a global job leveling framework that defines **how functions, families, career bands and levels** align in a systemic way to organize jobs across the Company.") (Emphasis in original).

<sup>123</sup> DISNEY-000035478 at 35495.

<sup>124</sup> DISNEY-000031267 at 31274.

<sup>125</sup> DISNEY-000032988 at 33027-8 (Compensation Education Module 1).

<sup>126</sup> DISNEY-000032988 at 33028 & 33024; *see also* DISNEY-000031566 at 31582 ("Assign job to a pay range that aligns to the market pay range for the job family and level.").

Segments, is a lateral move: “The general guideline is lateral changes (same salary grade and same job level) do not warrant salary increases.”<sup>127</sup>

Although pay grades/ranges and hiring ranges are determined at the level of Job Family/Job Level Composites, Disney considers a broader grouping than Job Family/Job Level appropriate for analyzing internal equity between women and men for its annual determinations of salary raises. For those analyses, it groups employees based on Career Band; those analyses are also done enterprise-wide, which includes all Segments.<sup>128</sup>

Notably, Disney uses the combination of Job Family and Job Level for both external and internal pay equity purposes:

- Benchmarking Disney jobs against jobs in the marketplace to set Disney pay grades and ranges to help ensure *external* pay equity,<sup>129</sup> and
- Evaluating Disney's own jobs to help ensure *internal* pay equity.<sup>130</sup>

External pay equity is an important driver in Disney's compensation policy. To remain competitive Disney seeks to pay its employees similarly to employees at competing employers for similar work.<sup>131</sup> The approach requires that Disney compare its jobs to jobs in the

---

<sup>127</sup> DISNEY-000021948 at 21950.

<sup>128</sup> See, e.g., DISNEY-000041950 (2015 enterprise-wide report by Band); DISNEY-000035559-66 (FY22 enterprise-wide report by Band).

<sup>129</sup> Annual Compensation Planning 2020 Leader Guide, DISNEY-000032448 at 32452.

<sup>130</sup> See DISNEY-000031074 at 31091 (for starting pay offers, comparing to other employees “by job family and job level,” including across the segment and across segments); Dep. of Kaitlyn Watkins (“Watkins Dep.”) 63:18-25, Apr. 27, 2023; see also fn. 128, *supra* (2015 enterprise-wide report by Band); DISNEY-000035559 (FY22 enterprise-wide report by Band)].

<sup>131</sup> Many companies conduct market benchmarking analyses to effectively compete for and attract job applicants and retain employees.

Barber, A. E., & Bretz, R. D. Jr. (2000). Compensation, attraction, and retention. In S. L. Rynes, & B. Gerhart (Eds.), *Compensation in organizations: Current research and practice* (pp. 32-60). San Francisco, CA: Jossey-Bass.

Gerhart, B. (2000). Compensation strategy and organizational performance. In S. L. Rynes, &

marketplace and pay its employees comparably to other employers pay their employees for similar work.<sup>132</sup> And, for Disney employees to feel their pay is equitable to what other employers pay their employees for similar work, both Disney and the vendor need to have job descriptive information that is sufficiently detailed to enable accurate matching of Disney jobs with jobs in the vendor’s database of jobs.

Disney jobs are compared and matched to jobs in the external market that have a known market value – external, market-based pay. Job Family and Job Levels are key for this matching. Job Families “[d]efine[] the nature of the work being performed for purposes of benchmarking to the external market,” and “Job Family is a key element in determining the appropriate salary grade and hiring range for open positions ....”<sup>133</sup> Likewise, “Job Levels are also fundamental to how we benchmark a job to the external market for purposes of determining a pay range and hiring range.”<sup>134</sup>

For this external equity, Disney uses pay ranges, which are “the competitive span between the minimum and maximum pay assigned to a job ....”<sup>135</sup> Benchmarking uses salary

---

B. Gerhart (Eds.), *Compensation in organizations: Current research and practice* (pp. 151-194). San Francisco, CA: Jossey-Bass.

Gerhart, B. & Milkovich, G. T. (1992). Employee compensation: Research and practice. In M. D. Dunnette & L. M. Hough, (Eds.) *Handbook of industrial and organizational psychology*, vol. 3, 2nd ed. (pp. 481-569). Palo Alto, CA: Consulting Psychologists Press, Inc.

Lawler, E. E. III. (1992). Strategic reward systems. In M. D. Dunnette & L. M. Hough, (Eds.) *Handbook of industrial and organizational psychology*, vol. 3, 2<sup>nd</sup> ed. (pp. 1010-1055). Palo Alto, CA: Consulting Psychologists Press, Inc.

Milkovich, G. T., & Newman, J. M. (1990). *Compensation*. Homewood, IL: BPI/Irwin

<sup>132</sup> Understanding Pay at Disney – HR Training Modules, DISNEY-000031566 at 31576 (“We use data from a specific set of our peers (the companies that are relevant to us) to ensure our pay practices are competitive.”) (Emphasis in original).

<sup>133</sup> DISNEY-000031317 at 31318.

<sup>134</sup> DISNEY-000032988 at 33013.

<sup>135</sup> DISNEY-000031566 at 31586.

survey jobs from third-party vendors.<sup>136</sup> Disney uses benchmarking to identify the market rate for a job, and “benchmarking is also referred to as market pricing.”<sup>137</sup> Disney uses “the knowledge, skills and abilities required for the performance of a job and utilizing either market survey data or internal slotting against another job to determine the worth of a job.”<sup>138</sup> This means Disney reviews its jobs based on level and family against the salary surveys it acquires.<sup>139</sup>

Disney then matches its jobs, based on family and level, to survey job descriptions that have at least an 80% match.<sup>140</sup> That is, an 80% overlap of job content and job requirements, based on Job Family/Job Level composite, is Disney’s standard for determining that the work is similar and should be paid similarly.<sup>141</sup>

Disney’s approach to compensation and the establishment of its global leveling and job framework are also designed to help ensure fair pay and internal pay equity. One of the three

---

<sup>136</sup> DISNEY000032988 at 33014 (Disney matches its jobs to salary survey jobs from reputable third party vendors that allows Disney “to look at similar roles within the organization that require similar knowledge, skills and abilities.”). Vendors exist that collect survey data from many companies about employee pay. They collect information about jobs (such as tasks, activities, responsibilities, knowledge, skills, abilities, and other characteristics of the work and job context) and the amount of pay workers in those jobs receive.

<sup>137</sup> DISNEY-000032988 at 33011.

<sup>138</sup> DISNEY-000032988 at 33011.

<sup>139</sup> DISNEY-000031566 at 31586 (“First, a job is assigned a level and family,” and then “survey data is reviewed to determine what the external market pays and to assign a competitive pay range for the job.”).

<sup>140</sup> DISNEY-000032988 at 33014; DISNEY-000031317 at 31318; DISNEY-000023513 at 23517; DISNEY-000005671 at 5693; ; DISNEY-000032927 at 32956.

<sup>141</sup> Gibson and Caplinger describe an accepted standard for determining job similarity that uses an index for establishing “substantial similarity” is .75 on a scale of .0 to 1.00 for comparing jobs in question. Gibson, W. M., & Caplinger, J. A. (2007). Transportation of validation results. In M. McPhail (Ed.), *Alternative validation strategies: Developing new and leveraging existing validity evidence* (pp. 29-81). San Francisco, CA: Jossey-Bass. Thus, the 80% standard that Disney routinely uses to assess similarity of its jobs to those in the marketplace to set pay for its jobs is a more stringent standard than has been used by some compensation data vendors, the courts, and the U.S. Department of Justice to establish substantial similarity of jobs. See, for example, *Chalmers v. City of New York*, 2022, 20 Civ. 3389 (AT) United States District Court, S.D. New York.

priorities of Disney’s pay philosophy is “fair to peers,”<sup>142</sup> which is, as described above, driven by the combination of Job Family and Job Level. “To ensure pay is fair for employees, we use a consistent global job leveling framework, pay structure, and incentive targets” as well as “job families” and “review.”<sup>143</sup> Each of the components is driven by Job Families and Job Levels. Pay ranges are determined by Job Family and Job Level, and incentive targets are based on a “[c]onsistent approach for those at the same job level and in the same job family.”<sup>144</sup>

Again, a comparison of the characteristics of a job – skills, abilities, responsibilities, experience, effort, authority, and so forth – to such characteristics in other Disney jobs is needed. This evaluation and classification process is part of Disney’s ongoing refinement and updating of its global job structure. The process helps facilitate the goal of paying Disney employees equitably. More specifically, job incumbents are paid at the same pay grade as other Disney employees in the same region with the Job Family/Job Level Composite,<sup>145</sup> i.e., employees who are performing substantially similar work based on standards and criteria Disney uses to classify its jobs.<sup>146</sup>

## 2. Disney’s Job Architecture Foundational for Other Disney HR Management Systems

---

<sup>142</sup> Understanding Pay at Disney – HR Training Modules, DISNEY-000031566 at 31575 and 31577.

<sup>143</sup> DISNEY-000031566 at 31577; Cordero Dep. 99:14-24 (confirmed global job leveling framework, job families, pay ranges, incentive targets, and reviews – are “critical components” of ensuring pay is fair to peers).

<sup>144</sup> DISNEY-000031566 at 31577. .

<sup>145</sup> Compensation Education Module 1, DISNEY-000005671 at 5702 (“Jobs in the same family and level will be in the same grade . . . but actual salary ranges may vary based on geographic differentials”).

<sup>146</sup> DISNEY-000035478 at 35496. In Disney’s own words: “At the Walt Disney Company, we strive to have a consistent approach to pay across our business segments, where appropriate. This consistency enhances the employee experience by ensuring they are paid fairly in comparison to those doing **substantially similar work** across the enterprise and enabling them to identify opportunities across the enterprise for career progression.” (emphasis added).

The importance of Disney’s job architecture is also apparent because it is foundational for its other HR management systems such as recruitment and selection, promotion, succession planning, and career planning and development.

Disney’s job architecture – its Job Families and Global Job Leveling Framework – are used for human resource management activities besides employee compensation. For example, they are used for recruitment, selection, promotion, succession planning, and career planning and development enterprise wide.<sup>147</sup> It is used during the recruitment process, and it is used to foster career development and facilitate employee movement across different parts of the enterprise.

Disney states:

- “For recruitment – Job Families drive the candidate experience on the Career Portal.”<sup>148</sup>
- “Regardless of business, geography, or job title, the Job Level will tell part of the story of the requirements needed for a role, and the overall framework can help define an employee’s career.”<sup>149</sup>
- “Global Job Leveling Framework provides visibility to the criteria that make up employees’ Job Levels, as well as possible paths for growth within their role and around the Company. Career growth may look more like a lattice than a ladder, and often includes horizontal moves that broaden skills and experiences.”<sup>150</sup>
- “Understanding Job Levels helps to guide employees to understand the roles for which they aren’t currently qualified and provide guidance on the skills and qualifications they should seek to gain to best position themselves for career growth.”<sup>151</sup>
- When an employee asks: “I’m interested in doing my job as a Project Manager in another part of the company. Where do I start?”, Disney leaders are instructed to say: “...As Project

---

<sup>147</sup> Global Job Leveling: Leader Reference Guide, DISNEY-000031217 at 31236; Disney Vista: Job Families, December 2, 2019, DISNEY-000023517; D Understand Your Pay: Compensation Education Module I, DISNEY-000005671 at 5689.

<sup>148</sup> Disney Vista Job Families, December 2, 2019, DISNEY-000023513 at 23517.

<sup>149</sup> Global Job Leveling: Leader Reference Guide, DISNEY-000031217 at 31236.

<sup>150</sup> *Id.* at 31239.

<sup>151</sup> *Id.* at 31236.

Manager positions become available, look at the Job Level on the posting. Then, you can consider if you have the experience and expertise to meet the Job Level requirements.”<sup>152</sup>

- “For Talent – Job Families drive the experience for employees and leaders with career pathing and succession planning.”<sup>153</sup>

## VI. CONCLUSIONS

Disney and its subject matter experts have undertaken significant and comprehensive work/job analysis companywide to classify its jobs into Job Families and Job Levels. The work is ongoing such that as work at Disney changes so do the Job Family/Job Level Composites. Disney’s continuous work analysis to accurately classify its jobs and update its job architecture helps ensure that, at any given time, jobs within Job Family/Job Level Composites are substantially similar.

The criteria and descriptions for Job Family/Job Level Composites are detailed and updated. The criteria and descriptions are entirely job related focusing on work duties, activities, skills, responsibilities, complexity, effort, decision-making authority, scope – the kind of information at a level of detail that I-O Psychologists use to develop fair and valid HR management systems including compensation, recruitment, and career planning and development.

Disney has operationalized its HR management systems, including compensation, recruitment, and career planning and development practices by focusing on Job Family and Job Level (Job Family/Job Level Composites). Specifically, Disney uses the combination of Job Family and Job Level to benchmark for pay ranges and market pricing. This practice as well as Disney’s other HR management systems are companywide. Thus, jobs within a Job Family/Job Level Composite have the same pay grade and pay range regardless of Disney business within which they reside.

---

<sup>152</sup> *Id.* at 31236; *See also id.* at DISNEY-000031217-31241.

<sup>153</sup> Disney Vista Job Families, December 2, 2019, DISNEY-000023513 at 23517.

The processes and activities that Disney subject matter experts engaged in and the resulting products of Disney's significant work analyses document that jobs within each Job Family within each Job Level (i.e., Job Family/Job Level Composite) are substantially similar. It is at that level in Disney's Job Family and Global Job Leveling Framework that pay equity analyses are appropriately examined to assess whether pay is equitable for men and women (and any other protected groups).

## REFERENCES

- American Educational Research Association, American Psychological Association, National Council on Measurement in Education. (2014). *Standards for educational and psychological testing*. Washington D.C.: American Educational Research Association.
- Anderson, N., Ones, D. S., Sinangil, H. K., & Viswesvaran, C. (Eds.) (2001). *Handbook of industrial, work and organizational psychology* (Vols. 1-2). London and New York: Sage.
- Barber, A. E., & Bretz, R. D. Jr. (2000). Compensation, attraction, and retention. In S. L. Rynes, & B. Gerhart (Eds.), *Compensation in organizations: Current research and practice* (pp. 32-60). San Francisco, CA: Jossey-Bass.
- Borman, W. C., & Motowidlo, S. J. (1993). Expanding the criterion domain to include elements of contextual performance. In N. Schmitt, W. C. Borman, & Associates (Eds.), *Personnel selection in organizations* (pp. 71-98).
- California Equal Pay Act, Cal. Labor Code §1197.5.
- Campbell, J. P. (1999). The definition and measurement of performance in the new age. In D. R. Ilgen, & E. D. Pulakos (Eds.), *The changing nature of performance* (pp. 399-429). San Francisco, CA: Jossey-Bass.
- Chalmers v. City of New York, 2022, 20 Civ. 3389 (AT) United States District Court, S.D. New York.
- Dunnette, M. D. (Ed.) (1976). *Handbook of industrial and organizational psychology*. Chicago, IL: Rand McNally.
- Dunnette, M. D., & Hough, L. M. (Eds.). (1990-1994). *Handbook of Industrial Organizational and Psychology* (Vols. 1-4). Palo Alto, CA: Consulting Psychologists Press.
- Equal Pay Act, 29 U.S.C. §206(d).
- Gael, S. (1988). Preface. In S. Gael (Ed.), *The job analysis handbook for business, industry, and government* (Vols. I & II, pp. xv-xvii). New York: John Wiley & Sons, Inc.
- Gael, S. (Ed.) (1988). *The job analysis handbook for business, industry, and government* (Vols. I & II). New York: John Wiley & Sons, Inc.
- Gerhart, B. (2000). Compensation strategy and organizational performance. In S. L. Rynes, & B. Gerhart (Eds.), *Compensation in organizations: Current research and practice* (pp. 151-194). San Francisco, CA: Jossey-Bass.
- Gerhart, B. & Milkovich, G. T. (1992). Employee compensation: Research and practice. In M. D. Dunnette & L. M. Hough, (Eds.) *Handbook of industrial and organizational*

- psychology*, vol. 3, 2nd ed. (pp. 481-569). Palo Alto, CA: Consulting Psychologists Press, Inc.
- Gibson, W. M., & Caplinger, J. A. (2007). Transportation of validation results. In M. McPhail (Ed.), *Alternative validation strategies: Developing new and leveraging existing validity evidence* (pp. 29-81). San Francisco, CA: Jossey-Bass.
- Harvey, R. J. (1991). Job analysis. In M. D. Dunnette & L. M. Hough, (Eds.) *Handbook of industrial and organizational psychology*, vol. 2, 2nd ed. (pp. 71-163). Palo Alto, CA: Consulting Psychologists Press, Inc.
- Hough, L. M. & Russell, T. (2022). Metrics for assessing similarity of jobs. *Industrial and Organizational Psychology: Perspectives on Science and Practice*, 15, 55-60.
- Howard, A. (Ed.). (1995). *The changing nature of work*. San Francisco, CA: Jossey-Bass.
- Klimoski, R. J., & Zukin, L. B. (1999). Selection and staffing for team effectiveness. In E. D. Sundstrom (Ed.), *Supporting work team effectiveness: Best management practices for fostering high performance* (pp. 63-91). San Francisco, CA: Jossey-Bass.
- Lawler, E. E. III. (1992). Strategic reward systems. In M. D. Dunnette & L. M. Hough, (Eds.) *Handbook of industrial and organizational psychology*, vol. 3, 2<sup>nd</sup> ed. (pp. 1010-1055). Palo Alto, CA: Consulting Psychologists Press, Inc.
- Macey, W. H., & Schneider, B. (2008). The meaning of employee engagement. *Industrial and Organizational Psychology*, 1, 3-30.
- McPhail, S. M. (Ed.). (2007). *Alternative validation strategies: Developing new and leveraging existing validity evidence*. San Francisco, CA: Jossey-Bass.
- Milkovich, G. T., & Newman, J. M. (1990). *Compensation*. Homewood, IL: BPI/Irwin.
- Morgeson, F. P. (2007). Job analysis and job analysis methods. In S. G. Rogelberg (Ed.), *Encyclopedia of industrial and organizational psychology* (Vol. 1, pp. 377-383). Thousand Oaks, CA: Sage.
- Outtz, J. L. (Ed.). (2010). *Adverse impact: Implications for Organizational Staffing and High-stakes Selection*. New York, NY: Routledge.
- Peterson, N. G., Mumford, M. D., Borman, W. C., Jeanneret, P. R., & Fleishman, E. A. (Eds.) (1999). *An occupational information system for the 21<sup>st</sup> century: The development of O\*NET*. Washington, DC: American Psychological Association.
- Peterson, N. G., Mumford, M. D., Borman, W. C., Jeanneret, P. R., Fleishman, E. A., Levin, K. Y., Campion, M. A., Mayfield, M. S., Morgeson, F. P., Pearlman, K., Gowing, M. K., Lancaster, A. R., Silver, M. B., & Dye, D. M. (2001). Understanding work using the occupational information network: Implications for practice and research. *Personnel Psychology*, 54, 451-492.

- Radford Survey (Aon Company) representative, Lonnie Abaya, November 12, 2018 phone conversation.
- Rogelberg, S. G. (2007). Introduction. In S. G. Rogelberg, (Ed.), *Encyclopedia of industrial organizational psychology*, vol. 1 (p. xxxv). Thousand Oaks, CA: Sage.
- Sackett, P. R., Walmsley, P.T., & Laczko, R. M. (2013). Job and work analysis. In I. B. Weiner (Ed.-in-Chief), *Handbook of psychology*; In W. C. Borman, D. R. Ilgen, & R. J. Klimoski (Eds.), *Handbook of psychology: Industrial and organizational psychology* (Vol. 12, pp. 61-81). New York: Wiley.
- Salas, E., Dickinson, T. L., Converse, S. A., & Tannenbaum, S. I. (1992). Toward an understanding of team performance and training. In R. W. Swezey & E. Salas (Eds.), *Teams: Their training and performance* (pp. 3-29). Norwood, NJ: Ablex Publishing Corporation.
- Sanchez, J. I., & Levine, E. L. (2001). Analysis of work in the 20<sup>th</sup> and 21<sup>st</sup> centuries. In N. Anderson, D. S. Ones, H. K. Sinangil, & C. Viswesvaran (Eds.), *Handbook of industrial, work and organizational psychology* (Vol. 1: *Personnel Psychology*, pp. 71-89). London and New York: Sage.
- Schneider, B., Macey, W. H., Barbera, K. M., & Martin, N. (2009). Driving customer satisfaction and financial success through employee engagement. *People and Strategy*, 32, 22-27.
- Society for Industrial and Organizational Psychology. (2003). *Principles for the Validation and Use of Personnel Selection Procedures* (4<sup>th</sup> edition). Bowling Green, OH: Author.
- Society for Industrial and Organizational Psychology. (2018). *Principles for the Validation and Use of Personnel Selection Procedures* (5<sup>th</sup> edition). Cambridge, MA: Cambridge University Press.
- Sundstrom, E. D. (Ed.) (1999). Preface. In E. D. Sundstrom & Associates (Ed.), *Supporting work team effectiveness: Best management practices for fostering high performance* (pp. xi-xv). San Francisco, CA: Jossey-Bass.
- Uniform Guidelines on Employee Selection Procedures. (1978). 43 *Federal Register*, 38290-38315.
- U.S. Department of Labor, Office of Federal Contract Compliance Programs Directive (DIR) 2018-05.
- U.S. Department of Labor, Office of Federal Contracts Compliance Programs (OFCCP) Federal Contract Compliance Manual, October 2014.
- Wilson, M. A., Bennett, W. Jr., Gibson, S. G., & Alliger, G. M. (Eds.). (2012). *The Handbook of work analysis: Methods, systems, applications, and science of work measurement in organizations*. New York, NY: Routledge – Taylor & Francis Group.

**Table 1**

<b>Broad Definitions of Roles in Each of the Five Disney Career Bands<sup>1</sup></b>	
Business Support	<ul style="list-style-type: none"> <li>• Performs clerical or administrative work.</li> <li>• Uses administrative, data organizing and coordination skills to complete work.</li> <li>• Performs duties according to established procedures.</li> </ul>
Technical Support	<ul style="list-style-type: none"> <li>• Performs technical work, often in support of professional roles.</li> <li>• Requires vocational training or the equivalent experience.</li> <li>• Performs duties according to established procedures.</li> </ul>
Professional/Expert	<ul style="list-style-type: none"> <li>• Applies a theoretical knowledge-base to work to achieve goals through own work.</li> <li>• Characterized by specific functional expertise typically gained through formal education.</li> <li>• May provide guidance to others as a project manager using technical expertise.</li> </ul>
Management	<ul style="list-style-type: none"> <li>• Achieves goals through the work of others.</li> <li>• Management responsibilities include performance appraisals, pay reviews, training and development.</li> <li>• Job focus is on managing others and applying operational or strategic management skills.</li> <li>• Management responsibility for meaningful internal or external workforce.</li> </ul>
Executive	<ul style="list-style-type: none"> <li>• Sets the strategic direction for the company.</li> <li>• Takes on enterprise-wide perspective.</li> <li>• Often identified by client definition of executive.</li> </ul>
<sup>1</sup> DISNEY-000005461 at 5462; DISNEY-0000023357 at 23358.	

**Table 2**

**Definitions/Criteria for Job Levels within Disney’s Business Support Band**

<b>B BUSINESS SUPPORT BAND</b>		<b>B1</b>	<b>B2</b>	<b>B3</b>	<b>B4</b>
<b>GENERAL PROFILE</b>	<ul style="list-style-type: none"> <li>• Entry-level position with limited prior training or relevant work experience</li> <li>• Acquires basic skills to perform routine tasks</li> <li>• Work is prescribed and completed with little autonomy</li> <li>• Works with either close supervision or under clearly defined procedures</li> </ul>	<ul style="list-style-type: none"> <li>• Has developed knowledge and skills through formal training or considerable work experience</li> <li>• Works within established procedures with a moderate degree of supervision</li> </ul>	<ul style="list-style-type: none"> <li>• Has developed specialized skills or is multi-skilled through job-related training and considerable on-the-job experience</li> <li>• Completes work with a limited degree of supervision</li> <li>• Likely to act as an informal resource for colleagues with less experience</li> </ul>	<ul style="list-style-type: none"> <li>• Has developed expertise in a variety of work processes or activities typically developed through a combination of job-related training and considerable on-the-job experience</li> <li>• Typically acts as a lead, coordinating the work of others—but not a supervisor</li> <li>• Works autonomously within established procedures and practices</li> </ul>	
<b>LEADERSHIP</b>	<ul style="list-style-type: none"> <li>• Has no supervisory responsibilities</li> </ul>	<ul style="list-style-type: none"> <li>• Has no supervisory responsibilities; manages own workload</li> </ul>	<ul style="list-style-type: none"> <li>• Provides informal guidance and support to more junior team members</li> </ul>	<ul style="list-style-type: none"> <li>• Serves as lead for the team, may allocate work; provides subject matter guidance to more junior team members</li> </ul>	
<b>BUSINESS EXPERTISE</b>	<ul style="list-style-type: none"> <li>• Understands how the assigned duties integrate with others in the team</li> </ul>	<ul style="list-style-type: none"> <li>• Understands how the assigned duties relate to others in the team and how the team integrates with others in the specialty</li> </ul>	<ul style="list-style-type: none"> <li>• Uses knowledge of how the team integrates with others to accomplish the team objectives</li> </ul>	<ul style="list-style-type: none"> <li>• Uses knowledge of how related teams impact achievement of objectives</li> </ul>	


**Table 2 Continued**  
**Definitions/Criteria for Job Levels within Disney’s Business Support Band**

**B** **BUSINESS SUPPORT BAND** (Cont’d)

<b>B</b>	<b>B1</b>	<b>B2</b>	<b>B3</b>	<b>B4</b>
<b>FUNCTIONAL KNOWLEDGE</b>	<ul style="list-style-type: none"> <li>Develops skills to perform basic activities in own job</li> </ul>	<ul style="list-style-type: none"> <li>Has established skills to perform a range of day-to-day activities</li> </ul>	<ul style="list-style-type: none"> <li>Is skilled in a range of processes, procedures and systems to carry out assigned tasks or has developed deep skills in a single area</li> </ul>	<ul style="list-style-type: none"> <li>Has developed breadth and/or depth of skills in a range of processes, procedures and systems, or acts as the technical expert in an area</li> </ul>
<b>PROBLEM SOLVING</b>	<ul style="list-style-type: none"> <li>Uses existing procedures to solve straightforward problems; has limited opportunity to exercise discretion</li> </ul>	<ul style="list-style-type: none"> <li>Recognizes and solves typical problems that can occur in own work area without supervisory approval; evaluates and selects solutions from established options</li> </ul>	<ul style="list-style-type: none"> <li>Provides solutions to problems in situations that are atypical or infrequently occurring based on practice and existing precedents or procedures</li> </ul>	<ul style="list-style-type: none"> <li>Gathers and analyzes data to identify and solve problems that arise with little or no precedent</li> </ul>
<b>IMPACT</b>	<ul style="list-style-type: none"> <li>Impacts the accuracy of own work; receives close supervision; duties are clearly defined, and methods and tasks are described in detail</li> </ul>	<ul style="list-style-type: none"> <li>Impacts own team through the quality of the services or information provided; follows standardized procedures and practices and receives regular but moderate supervision and guidance</li> </ul>	<ul style="list-style-type: none"> <li>Impacts the quality, timeliness and effectiveness of the team; uses discretion to modify work practices and processes to achieve results or improve efficiency</li> </ul>	<ul style="list-style-type: none"> <li>Impacts own team and other teams whose work activities are closely related; suggests improvements to existing processes and solutions to improve the efficiency of the team</li> </ul>
<b>INTER-PERSONAL SKILLS</b>	<ul style="list-style-type: none"> <li>Uses communication skills and common courtesy</li> </ul>	<ul style="list-style-type: none"> <li>Uses communication skills to exchange information</li> </ul>	<ul style="list-style-type: none"> <li>Explains technical information within the team</li> </ul>	<ul style="list-style-type: none"> <li>Evaluates and communicates technical content in a clear manner</li> </ul>

Table 3

Definitions/Criteria for Job Levels within Disney’s Technical Support Band

				
T	T1	T2	T3	T4
<b>GENERAL PROFILE</b>	<ul style="list-style-type: none"> <li>• Entry-level position with appropriate licenses/training certifications</li> <li>• Has basic skills in an analytical or scientific method or operational process</li> <li>• Works within clearly defined standard operating procedures and/or scientific methods and adheres to quality guidelines</li> <li>• Work is completed with close supervision</li> </ul>	<ul style="list-style-type: none"> <li>• Expands skills in own work area within an analytical/scientific method or operational process</li> <li>• Maintains appropriate licenses, training and/or certifications, as needed</li> <li>• Applies experience and skills to complete assigned work within area of expertise</li> <li>• Works within standard operating procedures and/or scientific methods</li> <li>• Works with a moderate degree of supervision</li> </ul>	<ul style="list-style-type: none"> <li>• Has developed proficiency in a range of processes or procedures through job-related training and considerable on-the-job experience</li> <li>• Completes a variety of atypical assignments, as needed</li> <li>• Works within defined processes and procedures or methodologies and may help determine the appropriate approach for new assignments</li> <li>• Completes work with a limited degree of supervision</li> <li>• Likely to act as an informal resource for colleagues with less experience</li> </ul>	<ul style="list-style-type: none"> <li>• Has advanced and specialized expertise in an analytical/scientific method or operational process, typically developed through a combination of job-related training and considerable on-the-job experience</li> <li>• Completes assignments and facilitates the work activities of others; may coordinate work beyond own area</li> <li>• Proposes improvements to processes and methods</li> <li>• Acts as a lead, coordinating the work of others—but is not a supervisor</li> <li>• Works autonomously within established procedures and practices</li> </ul>
<b>LEADERSHIP</b>	<ul style="list-style-type: none"> <li>• Has no supervisory responsibilities</li> </ul>	<ul style="list-style-type: none"> <li>• Has no supervisory responsibilities</li> </ul>	<ul style="list-style-type: none"> <li>• May provide informal guidance and support to more junior team members</li> </ul>	<ul style="list-style-type: none"> <li>• Serves as team lead, may allocate work and provide subject matter guidance to more junior team members</li> </ul>
<b>BUSINESS EXPERTISE</b>	<ul style="list-style-type: none"> <li>• Understands how the assigned duties relate to others in the team and how the team integrates with others</li> </ul>	<ul style="list-style-type: none"> <li>• Has good understanding of how the team integrates with others</li> </ul>	<ul style="list-style-type: none"> <li>• Has a good understanding of how the team integrates with others to achieve objectives</li> </ul>	<ul style="list-style-type: none"> <li>• Has a good understanding of how related teams coordinate their efforts and resources to achieve objectives</li> </ul>


**Table 3 Continued**  
**Definitions/Criteria for Job Levels within Disney's Technical Support Band**

**T** **TECHNICAL SUPPORT BAND (Cont'd)**

T	T1	T2	T3	T4
<b>FUNCTIONAL KNOWLEDGE</b>	<ul style="list-style-type: none"> <li>Applies basic analytical skills or scientific methods or operational processes to perform straightforward activities</li> </ul>	<ul style="list-style-type: none"> <li>Has developed analytical skills and application of scientific methods to perform a variety of activities</li> </ul>	<ul style="list-style-type: none"> <li>Has developed proficiency in a range of analytical processes or procedures to carry out assigned tasks</li> </ul>	<ul style="list-style-type: none"> <li>Has developed advanced specialized expertise within an analytical/scientific area to perform the most complex work</li> </ul>
<b>PROBLEM SOLVING</b>	<ul style="list-style-type: none"> <li>Uses standard operating procedures or scientific methods to guide own work and solve standard problems</li> </ul>	<ul style="list-style-type: none"> <li>Recognizes and solves typical problems that can occur in own work area without supervisory approval; evaluates and selects solutions from established operating procedures and/or scientific methods</li> </ul>	<ul style="list-style-type: none"> <li>Provides solutions to problems in situations that are atypical or infrequently occurring based on existing precedents or procedures</li> </ul>	<ul style="list-style-type: none"> <li>Exercises judgment, based on previous experience, practices and precedents, to identify and solve problems that arise with little or no precedent</li> </ul>
<b>IMPACT</b>	<ul style="list-style-type: none"> <li>Impacts own work</li> </ul>	<ul style="list-style-type: none"> <li>Impacts the quality of own work</li> </ul>	<ul style="list-style-type: none"> <li>Impacts the quality of own work and its contribution to the team</li> </ul>	<ul style="list-style-type: none"> <li>Impacts the effectiveness of own team and closely related teams</li> </ul>
<b>INTER-PERSONAL SKILLS</b>	<ul style="list-style-type: none"> <li>Uses communication skills to exchange information</li> </ul>	<ul style="list-style-type: none"> <li>Uses communication skills to exchange information</li> </ul>	<ul style="list-style-type: none"> <li>Uses communication skills regularly to exchange information</li> </ul>	<ul style="list-style-type: none"> <li>Exchanges ideas and information effectively; uses tact and diplomacy when dealing with others</li> </ul>

Table 4

Definitions/Criteria for Job Levels within Disney’s Professional Band

						
P	P1	P2	P3	P4	P5	P6
GENERAL PROFILE	<ul style="list-style-type: none"> <li>Performs routine assignments in the entry level to a professional job progression</li> <li>Typically requires a college or university degree or the equivalent work experience that provides knowledge and exposure to fundamental theories, principles and concepts</li> <li>Develops competence by performing structured work assignments</li> <li>Uses existing procedures to solve routine or standard problems</li> <li>Receives instruction, guidance and direction from others</li> </ul>	<ul style="list-style-type: none"> <li>Requires knowledge and experience in own specialty; still acquiring higher-level knowledge and skills</li> <li>Builds knowledge of the company, processes and customers</li> <li>Solves a range of straightforward problems</li> <li>Analyzes possible solutions using standard procedures</li> <li>Receives a moderate level of guidance and direction</li> </ul>	<ul style="list-style-type: none"> <li>Requires in-depth knowledge and experience</li> <li>Uses best practices and knowledge of internal or external business issues to improve products or services</li> <li>Solves complex problems; takes a new perspective on existing solutions</li> <li>Works independently, receives minimal guidance</li> <li>Acts as a resource for colleagues with less experience</li> </ul>	<ul style="list-style-type: none"> <li>Requires specialized depth and/or breadth of expertise</li> <li>Interprets internal or external business issues and recommends best practices</li> <li>Solves complex problems; takes a broad perspective to identify innovative solutions</li> <li>Works independently, with guidance in only the most complex situations</li> <li>May lead functional teams or projects</li> </ul>	<ul style="list-style-type: none"> <li>Often regarded as an expert in their particular field</li> <li>Applies in-depth understanding of how own specialty integrates within the function</li> <li>Solves unique and complex problems that have a broad impact on the business</li> <li>Contributes to the development of functional strategy</li> <li>Leads project teams to achieve milestones and objectives</li> <li>Consistently involved in major work efforts of strategic importance, working directly with senior levels, often multidisciplinary in nature</li> <li>Progression to this level is typically restricted on the basis of business requirements</li> </ul>	<ul style="list-style-type: none"> <li>Recognized as an external thought leader within a strategic function or specialty</li> <li>Influences the strategy to address internal or external business and regulatory issues</li> <li>Proactively identifies and solves the most complex problems that impact the management and direction of the business</li> <li>May participate in the development of the product or business strategy</li> <li>Leads multidisciplinary projects or initiatives</li> <li>Progression to this level is typically restricted on the basis of individual capabilities and business requirements</li> </ul>

**Table 4 Continued**  
**Definitions/Criteria for Job Levels within Disney's Professional Band**



**PROFESSIONAL BAND (Cont'd)**

<b>P</b>	<b>P1</b>	<b>P2</b>	<b>P3</b>	<b>P4</b>	<b>P5</b>	<b>P6</b>
<b>ROLE SUMMARY</b>	<ul style="list-style-type: none"> <li>Entry level professional role (typically college/university degree)</li> </ul>	<ul style="list-style-type: none"> <li>Intermediate level professional role, still becoming fully knowledgeable/skilled in the function/specialty</li> </ul>	<ul style="list-style-type: none"> <li>Role exhibiting full knowledge and expertise in the function/specialty</li> <li>Role where an employee may spend most of their career; top level role in a progression unless specialized skills are acquired or team leadership is applied</li> </ul>	<ul style="list-style-type: none"> <li>Role that either exhibits special skills/expertise in the function/specialty ("go-to" role) and/or serves as a team lead to others</li> <li>Does not provide full supervisory/managerial support, but may train, mentor and guide others</li> </ul>	<ul style="list-style-type: none"> <li>Often regarded as an expert in their particular field</li> <li>Not necessarily found in all functions/specialties</li> <li>Business need is a key factor to promotion to this level</li> </ul>	<ul style="list-style-type: none"> <li>Regarded as the technical expert in their particular field within the company and externally; "guru"</li> <li>Business need is a key factor to promotion to this level</li> <li>Found in select functions/specialties</li> </ul>
<b>LEADERSHIP</b>	<ul style="list-style-type: none"> <li>No supervisory responsibilities; accountable for developing technical contribution</li> </ul>	<ul style="list-style-type: none"> <li>No supervisory responsibilities but provides informal guidance to new team members</li> </ul>	<ul style="list-style-type: none"> <li>Acts as a resource for colleagues with less experience; may lead small projects with manageable risks and resource requirements</li> </ul>	<ul style="list-style-type: none"> <li>May lead functional teams or projects with moderate resource requirements, risk, and/or complexity</li> </ul>	<ul style="list-style-type: none"> <li>Leads projects with notable risk and complexity, consistently over time, often multidisciplinary in nature; develops the strategy for project execution</li> </ul>	<ul style="list-style-type: none"> <li>Leads highly visible multidisciplinary project teams or initiatives; provides thought leadership</li> </ul>

**Table 4 Continued**  
**Definitions/Criteria for Job Levels within Disney's Professional Band**



**PROFESSIONAL BAND (Cont'd)**

<b>P</b>	<b>P1</b>	<b>P2</b>	<b>P3</b>	<b>P4</b>	<b>P5</b>	<b>P6</b>
<b>BUSINESS EXPERTISE</b>	<ul style="list-style-type: none"> <li>Applies general knowledge of business developed through education or past experience</li> </ul>	<ul style="list-style-type: none"> <li>Understands key business drivers; uses this understanding to accomplish own work</li> </ul>	<ul style="list-style-type: none"> <li>Has knowledge of best practices and how own area integrates with others; is aware of the competition and the factors that differentiate them in the market</li> </ul>	<ul style="list-style-type: none"> <li>Interprets internal/external business challenges and recommends best practices to improve products, processes, or services</li> </ul>	<ul style="list-style-type: none"> <li>Applies in-depth understanding of how own specialty integrates within the broader function and/or across functions</li> </ul>	<ul style="list-style-type: none"> <li>Influences internal/external business and/or regulatory issues that have an impact on the business</li> </ul>
<b>FUNCTIONAL KNOWLEDGE</b>	<ul style="list-style-type: none"> <li>Requires conceptual knowledge of theories, practices and procedures within a specialty</li> </ul>	<ul style="list-style-type: none"> <li>Requires expanded conceptual knowledge in own specialty and broadens capabilities</li> </ul>	<ul style="list-style-type: none"> <li>Requires conceptual and practical expertise in own specialty and basic knowledge of related specialties</li> </ul>	<ul style="list-style-type: none"> <li>Requires depth and/or breadth of expertise in own specialty or field</li> </ul>	<ul style="list-style-type: none"> <li>Requires in-depth and/or breadth of expertise in own specialty and broad knowledge of other specialties within the function</li> <li>Often regarded as an expert in their particular field</li> </ul>	<ul style="list-style-type: none"> <li>Recognized as "guru" or external expert in a function</li> <li>Requires broad and comprehensive expertise in leading-edge theories, techniques and/or technologies within own field</li> </ul>
<b>PROBLEM SOLVING</b>	<ul style="list-style-type: none"> <li>Uses existing procedures to solve standard problems; analyzes information and standard practices to make judgments</li> </ul>	<ul style="list-style-type: none"> <li>Solves problems in straightforward situations; analyzes possible solutions using technical experience and judgment and precedents</li> </ul>	<ul style="list-style-type: none"> <li>Solves complex problems; takes a new perspective on existing solutions; exercises judgment based on the analysis of multiple sources of information</li> </ul>	<ul style="list-style-type: none"> <li>Leads others to solve complex problems; uses sophisticated analytical thought to exercise judgement and identify innovative solutions</li> </ul>	<ul style="list-style-type: none"> <li>Solves unique and complex problems with broad impact on the business; requires conceptual and innovative thinking to develop solutions</li> </ul>	<ul style="list-style-type: none"> <li>Proactively identifies and solves the most complex problems; uses groundbreaking methods to think beyond existing solutions</li> </ul>

**Table 4 Continued**  
**Definitions/Criteria for Job Levels within Disney's Professional Band**



**PROFESSIONAL BAND (Cont'd)**

<b>P</b>	<b>P1</b>	<b>P2</b>	<b>P3</b>	<b>P4</b>	<b>P5</b>	<b>P6</b>
<b>IMPACT</b>	<ul style="list-style-type: none"> <li>Has limited impact on own work team; works within standardized procedures and practices to achieve objectives and meet deadlines</li> </ul>	<ul style="list-style-type: none"> <li>Impacts quality of own work and the work of others on the team; works within guidelines and policies</li> </ul>	<ul style="list-style-type: none"> <li>Impacts a range of customer, operational, project or service activities within own team and other related teams; works within broad guidelines and policies</li> </ul>	<ul style="list-style-type: none"> <li>Impacts the achievement of customer, operational, project or service objectives; work is guided by functional policies</li> </ul>	<ul style="list-style-type: none"> <li>Impacts the direction and resource allocation for program, project or services; works within general functional policies and industry guidelines</li> <li>Involved in major work efforts of strategic importance, working directly with senior levels</li> </ul>	<ul style="list-style-type: none"> <li>Impacts business direction through the development of innovative services or products</li> </ul>
<b>INTER-PERSONAL SKILLS</b>	<ul style="list-style-type: none"> <li>Exchanges straightforward information, asks questions, and checks for understanding</li> </ul>	<ul style="list-style-type: none"> <li>Explains complex information to others in straightforward situations</li> </ul>	<ul style="list-style-type: none"> <li>Explains difficult or sensitive information; works to build consensus</li> </ul>	<ul style="list-style-type: none"> <li>Communicates difficult concepts and negotiates with others to adopt a different point of view</li> </ul>	<ul style="list-style-type: none"> <li>Communicates complex ideas, anticipates potential objections and persuades others, often with senior levels, to adopt a different point of view</li> </ul>	<ul style="list-style-type: none"> <li>Negotiates with senior management, customers, regulators or vendors to influence decisions</li> </ul>

**Table 5**

**Definitions/Criteria for Job Levels within Disney’s Management Band**



M	M1	M2	M3
<b>GENERAL PROFILE</b>	<ul style="list-style-type: none"> <li>Supervises the daily activities of business or technical support or production team</li> <li>Sets priorities for the team to ensure task completion; coordinates work activities with other supervisors</li> <li>Decisions are based on their managerial direction, guided by policies, procedures, and business plans; receives guidance and oversight from leader</li> <li>Typically does not perform the work supervised</li> </ul>	<ul style="list-style-type: none"> <li>Typically manages teams of professional employees and/or supervisors</li> <li>Is accountable for the performance and results of a team within own specialty</li> <li>Adapts departmental plans and priorities to address resource and operational challenges</li> <li>Decisions are guided by policies, procedures and business plan; receives guidance from leader</li> <li>Provides technical guidance to employees, colleagues, and/or customers</li> </ul>	<ul style="list-style-type: none"> <li>Provides leadership to others who lead and professional staff</li> <li>Is accountable for the performance and results of multiple related teams</li> <li>Develops departmental plans, including business, production, and/or organizational priorities</li> <li>Decisions are guided by resource availability and functional objectives</li> </ul>
<b>LEADERSHIP</b>	<ul style="list-style-type: none"> <li>Provides supervision over the daily activities of business or technical support or production teams</li> <li>Sets priorities for and coaches team members to ensure daily deadlines are met</li> </ul>	<ul style="list-style-type: none"> <li>Typically provides management to teams of professionals and/or M1 Level supervisors and their teams</li> <li>Adapts departmental priorities and is accountable for the performance of teams under them</li> </ul>	<ul style="list-style-type: none"> <li>Provides leadership to M1 Level supervisors and M2 Level managers and their teams; may also provide direct leadership to teams of professionals</li> <li>Develops departmental priorities and is accountable for the performance and results of multiple teams</li> </ul>
<b>BUSINESS EXPERTISE</b>	<ul style="list-style-type: none"> <li>Applies understanding of how the team relates to other closely related areas to improve efficiency of own team</li> </ul>	<ul style="list-style-type: none"> <li>Applies understanding of the industry and how own area contributes to the achievement of objectives</li> </ul>	<ul style="list-style-type: none"> <li>Applies in-depth understanding of how own specialty integrates within the function</li> </ul>


**Table 5 Continued**  
**Definitions/Criteria for Job Levels within Disney's Management Band**

**M** **MANAGEMENT BAND** (Cont'd)

<b>M</b>	<b>M1</b>	<b>M2</b>	<b>M3</b>
<b>FUNCTIONAL KNOWLEDGE</b>	<ul style="list-style-type: none"> <li>Requires understanding and application of procedures and concepts within own specialty and basic knowledge of other specialties</li> </ul>	<ul style="list-style-type: none"> <li>Requires in-depth understanding of concepts, theories, and principles in own specialty and basic knowledge of other specialties</li> </ul>	<ul style="list-style-type: none"> <li>Requires comprehensive understanding of concepts and principles within own specialty and knowledge of others</li> </ul>
<b>PROBLEM SOLVING</b>	<ul style="list-style-type: none"> <li>Uses judgment to identify and resolve day-to-day technical and operational problems</li> </ul>	<ul style="list-style-type: none"> <li>Identifies and resolves technical, operational, and organizational problems</li> </ul>	<ul style="list-style-type: none"> <li>Identifies and resolves complex technical, operational, and organizational problems</li> </ul>
<b>IMPACT</b>	<ul style="list-style-type: none"> <li>Impacts the quality, efficiency, and effectiveness of own team and its contribution to the sub-function</li> </ul>	<ul style="list-style-type: none"> <li>Impacts the level of service and the team's ability to meet quality, volume, and timeliness objectives</li> <li>Guided by policies, resource requirements, budgets, and the business plan</li> </ul>	<ul style="list-style-type: none"> <li>Impacts the business results of a sub-function by supporting and funding of projects, products, services and/or technologies, and developing policies and plans</li> <li>Guided by functional business plans</li> </ul>
<b>INTER-PERSONAL SKILLS</b>	<ul style="list-style-type: none"> <li>Uses tact and diplomacy to exchange information and handle sensitive issues</li> </ul>	<ul style="list-style-type: none"> <li>Guides, influences, and persuades others either internally in other areas or externally with customers or agencies</li> </ul>	<ul style="list-style-type: none"> <li>Influences others internally and externally, including senior leaders</li> </ul>

Table 6

Definitions/Criteria for Job Levels within Disney’s Executive Band

				
E	E1	E2	E3	E4+
GENERAL PROFILE	<ul style="list-style-type: none"> <li>Is accountable for the performance and results of related or diverse specialties or departments within a major region or division</li> <li>Develops and executes functional or departmental strategy and business plans to achieve key business objectives</li> <li>Decisions are guided by company and functional strategy and objectives, along with functional strategy and priorities</li> </ul>	<ul style="list-style-type: none"> <li>Has primary accountability for the financial performance of a function, line of business or region</li> <li>Develops and executes function, line of business or region strategy</li> <li>Influences the allocation of resources across multiple lines of business, regions, or sub-functions</li> </ul>	<ul style="list-style-type: none"> <li>Has primary accountability for the financial performance of a strategic function, Business, or region</li> <li>Develops and executes strategic plan for own function, Business, or region</li> <li>Is accountable for decisions that have significant impact on financial or operational performance</li> </ul>	<ul style="list-style-type: none"> <li>Establishes the overall strategic direction of the company as a member of the executive committee</li> <li>Has primary accountability for the financial performance and/or operations of a business segment, region or multiple strategic functions</li> <li>Is accountable for long-range planning and major initiatives of the company</li> <li>Has direct and lasting impact on overall corporate performance</li> </ul>
LEADERSHIP	<ul style="list-style-type: none"> <li>Leads a function typically through multiple levels of M-Band leaders of diverse activities (and their teams), developing and executing functional strategy of business plans to achieve key business objectives</li> <li>Typically provides direction to multiple leaders/teams</li> </ul>	<ul style="list-style-type: none"> <li>Has full leadership responsibility for E1 Level and M-Band leaders of related activities (and their teams), developing and executing functional, line of business, or regional strategy of business plans to achieve key business objectives</li> <li>Typically provides direction to multiple leaders/teams</li> </ul>	<ul style="list-style-type: none"> <li>Has full leadership responsibility for teams of leaders at the E2 and E1 Levels (and their teams), planning for the future needs of the Business and providing functional strategy</li> <li>Typically provides direction to multiple leaders/teams</li> </ul>	<ul style="list-style-type: none"> <li>Has full leadership responsibility for numerous teams of E-Band leaders at all levels (and their teams), performing a wide range of activities for a Business or region, planning for future needs and operations, and providing functional and business strategy</li> <li>Typically provides direction to multiple leaders/teams</li> </ul>

- Positioning within the Executive Band may depend on additional special criteria, such as business complexity and impact
- Specific factors that may help determine Executive Band positioning include unique job responsibilities, broad scope of a role, revenue responsibility (where applicable), and reporting line

**Table 6 Continued**  
**Definitions/Criteria for Job Levels within Disney's Executive Band**

**E** EXECUTIVE BAND (Cont'd)

<b>E</b>	<b>E1</b>	<b>E2</b>	<b>E3</b>	<b>E4+</b>
<b>BUSINESS EXPERTISE</b>	<ul style="list-style-type: none"> <li>Applies in-depth knowledge of own function, business, and commercial expertise to differentiate itself from the competition or applies broad industry and commercial awareness to drive financial and operational performance across sub-functions</li> </ul>	<ul style="list-style-type: none"> <li>Has in-depth knowledge how own function integrates within the Business and how the sub-functions collectively integrate within the function; has knowledge of direct competitors</li> </ul>	<ul style="list-style-type: none"> <li>Has in-depth knowledge of how multiple functions, Businesses, and regions work together with knowledge of the economic, commercial, and political issues affecting the industry</li> </ul>	<ul style="list-style-type: none"> <li>Has a comprehensive understanding of the Business, and a thorough understanding of economic, commercial, and political issues affecting the industry</li> </ul>
<b>FUNCTIONAL KNOWLEDGE</b>	<ul style="list-style-type: none"> <li>Requires broad and comprehensive understanding of different systems, theories, and practices as well as the changing business environment</li> </ul>	<ul style="list-style-type: none"> <li>Has broad and comprehensive understanding of systems, theories, and practices in a function</li> </ul>	<ul style="list-style-type: none"> <li>Has broad and comprehensive understanding of systems, theories, and practices in a function, Business, or region</li> </ul>	<ul style="list-style-type: none"> <li>Has broad and comprehensive understanding of the different systems, theories, and practices relevant to the Business</li> </ul>
<b>PROBLEM SOLVING</b>	<ul style="list-style-type: none"> <li>Evaluates key business challenges; directs the development of new or innovative solutions or directs the resolution of highly complex or unusual business problems applying advanced analytical thought and judgment</li> </ul>	<ul style="list-style-type: none"> <li>Evaluates key business and organizational challenges; develops innovative solutions within broad company policies and strategy</li> </ul>	<ul style="list-style-type: none"> <li>Integrates fundamental organizational requirements (organization structure, policies, resources, etc.) and innovative thinking to develop new solutions</li> </ul>	<ul style="list-style-type: none"> <li>Drives business direction on the basis of market trends; originates new, uncharted approaches and solutions</li> </ul>

**Table 6 Continued**  
**Definitions/Criteria for Job Levels within Disney's Executive Band**

**E** EXECUTIVE BAND (Cont'd)

E	E1	E2	E3	E4+
<b>IMPACT</b>	<ul style="list-style-type: none"> <li>Guided by Company strategy and functional business objectives, impacts results of a core business, part of a function, division, or region, or facilitates the work done by other functions by providing support to impact the business</li> </ul>	<ul style="list-style-type: none"> <li>Impacts the performance of product line, function, region, or market in support of the broader market or functional strategy</li> </ul>	<ul style="list-style-type: none"> <li>Sets or significantly impacts the strategy of a function, region, or Business</li> </ul>	<ul style="list-style-type: none"> <li>Serves with peers on the executive leadership team to set the overall strategic direction of the Company; has direct and lasting impact on a key Business', function's, or region's revenue and profitability</li> </ul>
<b>INTER-PERSONAL SKILLS</b>	<ul style="list-style-type: none"> <li>Influences and negotiates with great latitude on outcomes; presents and defends complicated or delicate issues; exercises sensitivity to the audience</li> </ul>	<ul style="list-style-type: none"> <li>Influences the opinions of their teams and others; establishes collaborative relationships with other departments within the Business or external organizations</li> </ul>	<ul style="list-style-type: none"> <li>Influences a wide range of audiences; presents and defends complicated or delicate issues that have an important impact on the business</li> </ul>	<ul style="list-style-type: none"> <li>Influences and shapes the image of the Company; presents and defends complicated or delicate issues that have an important impact on the business</li> </ul>

**Table 7**

**Other - Frontline Operational Jobs, Attorneys, and Unique Positions**

Frontline Operational	Attorney Band
<ul style="list-style-type: none"><li>• In addition to the five Career Bands are various frontline operational roles, spanning across all businesses.</li><li>• These unique jobs don't fall into the Career Bands, due to nuances unique to the operational nature of the role.</li><li>• Many frontline operational employees may aspire to move into a Career Band role.</li></ul>	<ul style="list-style-type: none"><li>• The Attorney Band is an additional band within the framework that is designed exclusively for the practicing attorneys within the Company.</li></ul>

**BEYOND THE BANDS**

**Table 8**  
**SAMPLE List of Disney Job Functions<sup>1</sup>**

<ul style="list-style-type: none"> <li>• Creative</li> <li>• Production</li> <li>• Stage Productions</li> <li>• Sales</li> <li>• Technology</li> <li>• Administration</li> <li>• Animation and Visual Effects</li> <li>• Architecture and Design</li> <li>• Asset Management</li> <li>• Banking</li> <li>• Building, Construction and Facilities</li> <li>• Business Strategy and Development</li> <li>• Call Center</li> <li>• Communications</li> <li>• Culinary</li> <li>• Data Science and Analytics</li> <li>• Engineering</li> <li>• Executive</li> <li>• Finance and Accounting</li> <li>• Food and Beverage</li> <li>• Gaming and Interactive</li> <li>• General Management</li> <li>• Governmental Affairs</li> </ul>	<ul style="list-style-type: none"> <li>• Graphic Design</li> <li>• Health Services</li> <li>• Horticulture and Landscaping</li> <li>• Hotel and Resorts</li> <li>• Human Resources</li> <li>• Legal and Business Affairs</li> <li>• Licensing</li> <li>• Maritime and Cruise Operations</li> <li>• Marketing and Digital Media</li> <li>• Merchandising</li> <li>• Operations</li> <li>• Project Management</li> <li>• Publishing</li> <li>• Quality Assurance</li> <li>• Research and Development</li> <li>• Retail Operations</li> <li>• Sciences and Animal Programs</li> <li>• Security</li> <li>• Social Responsibility</li> <li>• Sports and Recreation</li> <li>• Supply Chain Management</li> <li>• Talent</li> <li>• Theme Park Operations</li> </ul>
--	--

<sup>1</sup> DISNEY-000031352.

**Table 9**  
**Examples of Disney Job Families Embedded within Job Functions**

<b>Job Function</b>	<b>Job Families Embedded within Job Function</b>
<i>Human Resources</i> <sup>1</sup>	<ul style="list-style-type: none"> <li>• Benefits</li> <li>• Compensation</li> <li>• Diversity</li> <li>• Employee Relations</li> <li>• Executive Compensation</li> <li>• Executive OP</li> <li>• Stock Administration</li> <li>• Global Mobility</li> <li>• HR Shared Services</li> <li>• HR Business Partner/Generalist</li> <li>• HR Information Systems</li> <li>• Immigration</li> <li>• Labor Relations</li> <li>• Learning &amp; Development</li> <li>• Talent Acquisition</li> <li>• Talent Acquisition – Campus</li> <li>• Talent Acquisition – Hourly</li> <li>• Talent Management</li> <li>• Workforce Analytics</li> <li>• HR Business Intelligence/WFI<sup>2</sup></li> <li>• HR Leaves/Compliance/Policy</li> <li>• HR SSVCS Process/Knowledge management<sup>2</sup></li> <li>• HR Org. Management<sup>2</sup></li> </ul>

<sup>1</sup> DISNEY-000023513 at 23518; DISNEY-000005671 at 5683.

<sup>2</sup> New job family; DISNEY-000041298 at 41301.

**Table 9 Continued**  
**Examples of Disney Job Families Embedded within Job Functions**

<b>Job Function</b>	<b>Job Families Embedded within Job Function</b>
Technology <sup>1</sup>	<ul style="list-style-type: none"> <li>• Software Engineer</li> <li>• Network Engineer</li> <li>• Systems Engineer</li> <li>• Architecture</li> <li>• Data Science</li> <li>• Database Engineering</li> <li>• Business Intelligence</li> <li>• Database Administration</li> <li>• QA (Quality Assurance) Engineering</li> <li>• Radio/Audio/Visual Engineering</li> <li>• Security Engineering</li> <li>• User Experience</li> <li>• Web Development</li> <li>• QA (Quality Assurance) Analyst</li> <li>• Business &amp; Information Analysis</li> <li>• Product Development</li> <li>• Technical Support</li> <li>• Information management Engineering</li> <li>• Product Management</li> </ul>

<sup>1</sup> DISNEY-00041301; DISNEY-00005683.

**Table 10**  
**Example of the Detailed Job Information for Seven Disney Job Family/Job Level Composites**

**Job Family: Media Delivery – QC Managers**

**Job Family Overview:** The Media Delivery team at DSS is responsible for the entire video encoding supply chain from acquisition to delivery, consisting of agile and responsive teams of technicians that perform the daily processes and procedures of our live and on-demand streaming video products. The department's responsibilities provide round-the-clock support for these products, ensuring proper functionality across all platforms and front-end playback scenarios. The QC organization maintains quality standards by approving incoming materials, in-process production, finished products, and recording the results.

**Management Band**

Job Title	Sup, Media Delivery QC	Mgr, Media Delivery QC	Sr Mgr, Media Delivery QC
Job Level	M1	M2	M3
Salary Grade / Job Key	Q21	Q23	Q25
Exempt / Non-Exempt	Non-Exempt	Exempt	Exempt
Variable Pay Eligibility			
<b>Career Level General Profile</b> [Reference -- may be removed upon completion]	<ul style="list-style-type: none"> <li>Supervises the daily activities of business or technical support or production team</li> <li>Sets priorities for the team to ensure task completion; coordinates work activities with other supervisors</li> <li>Decisions are guided by policies, procedures and business plan; receives guidance and oversight from manager</li> <li>Typically does not perform the work supervised</li> </ul>	<ul style="list-style-type: none"> <li>Manages professional employees and/or supervisors</li> <li>Is accountable for the performance and results of a team within own specialty</li> <li>Adapts departmental plans and priorities to address resource and operational challenges</li> <li>Decisions are guided by policies, procedures and business plan; receives guidance from manager</li> <li>Provides technical guidance to employees, colleagues and/or customers</li> </ul>	<ul style="list-style-type: none"> <li>Provides leadership to managers and professional staff</li> <li>Is accountable for the performance and results of multiple related teams</li> <li>Develops departmental plans, including business, production and/or organizational priorities</li> <li>Decisions are guided by resource availability and functional objectives</li> </ul>
<b>Specific Accountabilities</b> • Job Responsibilities • Scope of Work • Role in strategy formulation • Leadership responsibilities	<ul style="list-style-type: none"> <li>Supervises a team of QC Techs. .</li> <li>Contributes to the creation and documentation of operational procedures</li> <li>Provides training and support to ensure the QC workflow is being executed properly.</li> <li>Provides ongoing status of the overall QC workload and performance of the team.</li> <li>Acts as Tier 1 support for internally reported qc issues</li> </ul>	<ul style="list-style-type: none"> <li>Manages a team of Supervisors and QC Techs</li> <li>Maintains the QC Staff and supervisor staff schedules</li> <li>Defines operational procedures and requirements used by QC Techs and supervisors</li> <li>Assists in training and technical guidance to supervisors and QC Techs</li> <li>Contributes to requirements with internal development teams</li> </ul>	<ul style="list-style-type: none"> <li>Manages a team of Managers/Supervisors and QC Techs</li> <li>Defines operational priorities for the QC team</li> <li>Assists in training and technical guidance to managers/supervisors and QC Techs</li> <li>Defines and prioritizes functional requirements with internal development teams</li> <li>Works with external partners on QC related issues</li> </ul>

**Table 10 Continued**  
**Example of the Detailed Job Information for Seven Disney Job Family/Job Level Composites**

		<ul style="list-style-type: none"> <li>• Provides analysis and reporting on the QC workflow and works with Senior Manager to resolve issues.</li> <li>• Acts as tier 1 support for customer or internally reported qc issues</li> <li>• Supports QC Operations(20%)</li> </ul>	<ul style="list-style-type: none"> <li>• Reports on performance of the team to department leads</li> <li>• Acts as tier 2 support for customer or internally reported qc issues</li> <li>• Supports QC Operations(20%)</li> </ul>
<p><b>Problem Solving/ Decision Making</b></p> <ul style="list-style-type: none"> <li>• Decision making authority</li> <li>• Accountability for Financial Results/ Outcomes</li> <li>• Involvement in policy determination</li> <li>• Analysis and Problem solving</li> <li>• Interpretation of Information</li> </ul>	<ul style="list-style-type: none"> <li>• Requires understanding and application of procedures and concepts within own specialty and basic knowledge of other specialties.</li> <li>• Applies understanding of how the team relates to other closely related areas to improve efficiency of own team.</li> <li>• Uses judgment to identify and resolve day-to-day technical and operational problems. <b>Technical and operational problems of the QC workflow.</b></li> <li>• Impacts the quality, efficiency and effectiveness of own team and its contribution to the sub-function.</li> <li>• Work is subject to regular review relative to defined milestones. <b>QC on track, tickets in remediation are being completed.</b></li> <li>• Provides input into daily operating plans of the work group or team.</li> <li>• Outcomes impact assigned work group / team.</li> <li>• Determines processes to achieve defined operating plans.</li> </ul>	<ul style="list-style-type: none"> <li>• Requires in-depth understanding of concepts, theories and principles of <b>audio visual qc.</b></li> <li>• Applies understanding of the industry and how own area contributes to the achievement of objectives.</li> <li>• Work is reviewed relative to defined operating outcomes / milestones.</li> <li>• Works with department leaders to inform and set policies, processes, and goals for managed team.</li> <li>• Identifies and resolves technical, operational and organizational problems.</li> <li>• Impacts the level of service and the team's ability to meet quality, volume, and timeliness objectives.</li> <li>• Guided by policies, resource requirements, budgets and the business plan.</li> </ul>	<ul style="list-style-type: none"> <li>• Requires comprehensive understanding of concepts and principles of <b>audio visual qc.</b></li> <li>• Applies in-depth understanding of how own specialty integrates within the function.</li> <li>• Work is reviewed relative to defined operating outcomes / milestones. <b>QC operations are running efficiently and goals/timelines are being met</b></li> <li>• Works with department leaders to inform and set policies, processes, and goals for department.</li> <li>• Identifies and resolves complex technical, operational and organizational problems.</li> <li>• Impacts the business results of a sub-function by supporting and funding of projects, products, services and/or technologies and developing policies and plans.</li> <li>• Guided by functional business plans.</li> </ul>
<p><b>Communications/ Interactions</b></p> <ul style="list-style-type: none"> <li>• Interaction with peers or mgmt at Unit/ Dept/Company level</li> <li>• Customer Service/ Relationships</li> <li>• Internal or external customers</li> </ul>	<ul style="list-style-type: none"> <li>• Has formal supervisory responsibilities; sets priorities for and coaches employees to meet daily deadlines.</li> <li>• Trains new employees on daily tasks and specialized equipment. Mentors and ensures the ongoing training of members of work group / team.</li> <li>• Uses tact and diplomacy to exchange information and handle sensitive issues.</li> <li>• Interacts with subordinates, peers and/or managers in other work groups / teams / customers / vendors to share information, transact business agreements and improve workflow processes.</li> </ul>	<ul style="list-style-type: none"> <li>• Manages a generally homogeneous team; adapts plans and priorities to meet service and/or operational challenges.</li> <li>• Ensures the ongoing training and development of direct reports.</li> <li>• Interacts with direct reports and peers in management / customers / vendors to share information and improve cross-departmental processes.</li> <li>• Builds or manages complex relationships with external affiliates.</li> <li>• Manages relationships with key external vendors.</li> <li>• Guides, influences and persuades others either internally in other areas or externally with</li> </ul>	<ul style="list-style-type: none"> <li>• Manages multiple related teams, sets organizational priorities and allocates resources.</li> <li>• Ensures the ongoing training and development of direct reports.</li> <li>• Interacts with direct reports and peers in management / customers / vendors to share information and improve cross-departmental processes.</li> <li>• Builds and manages complex relationships with external affiliates.</li> <li>• Manages relationships with key external vendors.</li> <li>• Influences others internally and externally, including senior leaders.</li> </ul>

**Table 10 Continued**  
**Example of the Detailed Job Information for Seven Disney Job Family/Job Level Composites**

<p><b>Specific Knowledge/Skills/ Experience</b></p> <ul style="list-style-type: none"> <li>• Years of work exp</li> <li>• Educ/degree requirements</li> <li>• Business/systems knowledge</li> </ul>	<ul style="list-style-type: none"> <li>• Typically has 5 or more years of video quality control related experience with 1 or more years of lead / supervisory experience.</li> <li>• BA/BS required</li> <li>• Background in encoding audio/video for the web</li> <li>• Good understanding of video codecs and encoding</li> <li>• Working knowledge of ABR streaming, specifically HLS</li> <li>• A solid computer and technical background, with experience working in new media and online organizations.</li> <li>• Ability to recognize video/audio issues</li> <li>• Exemplary attention to detail.</li> <li>• Solid organizational skills.</li> <li>• must be self-motivated.</li> <li>• must have a strong ability to multitask and adapt to new situations.</li> <li>• Fluency in languages other than English is a big preferred (Dutch, French, Spanish, German, Mandarin, etc)</li> </ul>	<ul style="list-style-type: none"> <li>• customers or agencies.</li> <li>•</li> <li>• Typically has 7 or more years of experience in a media or technology field with 3 or more years of management experience.</li> <li>• BA/BS required</li> <li>• 5+ years of experience in a video quality control position</li> <li>• Solid understanding of digital video/audio formats, video codecs and encoding</li> <li>• Solid understanding of ABR streaming, specifically HLS</li> <li>• Strong organizational skills; must be able to track large scale projects and keep teams updated on status.</li> <li>• Experience working with asset management systems</li> <li>• Must be able to field questions and handle several on-going projects simultaneously</li> <li>• Fluency in languages other than English is preferred</li> </ul>	<ul style="list-style-type: none"> <li>• Typically has 10 or more years of experience in a media or technology field with 4 or more years of management experience.</li> <li>• BA/BS required; Advanced Degree preferred</li> <li>• 7+ years of experience in a video quality control position</li> <li>• Experience supporting a large quality control operation</li> <li>• Solid understanding of digital video/audio formats, video codecs and encoding</li> <li>• Solid understanding of ABR streaming, specifically HLS</li> <li>• Strong organizational skills; must be able to track large scale projects and keep teams updated on status.</li> <li>• Experience working with asset management systems</li> <li>• Must be able to field questions and handle several on-going projects simultaneously</li> <li>• Must be able to pivot project plans quickly to meet the changing needs of internal and external stakeholders</li> <li>• Fluency in languages other than English is preferred</li> </ul>
<p><b>Enabling Experiences for Career Advancement to Next Level</b></p>	<p align="center"><b>M1 to M2</b></p> <ul style="list-style-type: none"> <li>• Through work experience shows a good understanding of the QC operations</li> <li>• Displays the ability to make decisions when a manager is not present</li> <li>• Displays ability to manage people effectively apart from delegating tasks and new work</li> </ul>	<p align="center"><b>M2 to M3</b></p> <ul style="list-style-type: none"> <li>• Through work experience shows a thorough and complete understanding of the QC operations</li> <li>• Displays leadership and confidence in their decision making</li> <li>• Is comfortable and effective when dealing with internal and external partners..</li> </ul>	

**Table 10 Continued**  
**Example of the Detailed Job Information for Seven Disney Job Family/Job Level Composites**

	<ul style="list-style-type: none"> <li>• Is comfortable communicating at all levels of the organization including VP and SVP levels.</li> <li>• Has the confidence to make decisions and stand by them.</li> </ul>
--	--

**Job Family: Media Delivery – QC Technician**

**Job Family Overview:** The Media Delivery team at DSS is responsible for the entire video encoding supply chain from acquisition to delivery, consisting of agile and responsive teams of technicians that perform the daily processes and procedures of our live and on-demand streaming video products. The department’s responsibilities provide round-the-clock support for these products, ensuring proper functionality across all platforms and front-end playback scenarios. The QC organization maintains quality standards by approving incoming materials, in-process production, finished products, and recording the results.

**Technical Support Band**

Job Title	Assoc QC Technician	QC Technician	Sr QC Technician	Lead QC Technician
Job Level	T1: Entry	T2: Intermediate	T3: Senior	T4: Lead
Salary Grade / Job Key	Q16	Q17	Q19	Q21
Exempt / Non-Exempt	Non-Exempt	Non-Exempt	Non-Exempt	Non-Exempt
Variable Pay Eligibility				
<b>Career Level General Profile</b> [Reference – may be removed upon completion]	<ul style="list-style-type: none"> <li>• Entry-level position</li> <li>• Has basic skills in an operational process</li> <li>• Works within clearly defined standard operating procedures</li> <li>• Work is completed with close supervision</li> </ul>	<ul style="list-style-type: none"> <li>• Expands skills in own work area within an operational process</li> <li>• Maintains appropriate training as needed</li> <li>• Applies experience and skills to complete assigned work within area of expertise</li> <li>• Works within standard operating procedures</li> <li>• Works with a moderate degree of supervision</li> </ul>	<ul style="list-style-type: none"> <li>• Has developed proficiency in a range of processes or procedures through job-related training and considerable on-the-job experience</li> <li>• Completes a variety of atypical assignments, as needed</li> <li>• Works within defined processes and procedures or methodologies and may help determine the appropriate approach for new assignments</li> <li>• Completes work with a limited degree</li> </ul>	<ul style="list-style-type: none"> <li>• Has advanced and specialized expertise in an operational process, typically developed through a combination of job-related training and considerable on-the-job experience</li> <li>• Completes assignments and facilitates the work activities of others; may coordinate work beyond own area</li> <li>• Proposes improvements to processes and methods</li> </ul>

**Table 10 Continued**  
**Example of the Detailed Job Information for Seven Disney Job Family/Job Level Composites**

			<ul style="list-style-type: none"> <li>of supervision</li> </ul>	<ul style="list-style-type: none"> <li>Acts as a lead, coordinating the work of others but is not supervisor</li> <li>Works autonomously within established procedures and practices</li> </ul>
<ul style="list-style-type: none"> <li>Job Responsibilities</li> <li>Scope of Work</li> <li>Role in strategy formulation</li> <li>Leadership responsibilities</li> </ul>	<ul style="list-style-type: none"> <li>checking the video/audio quality</li> <li>report any abnormalities via Google Form</li> </ul>	<ul style="list-style-type: none"> <li>checking the video/audio quality</li> <li>report any abnormalities via Google Form</li> <li>Likely to act as an informal resource for colleagues with less experience</li> </ul>	<ul style="list-style-type: none"> <li>checking the video/audio quality</li> <li>Maintains quality standards by approving incoming materials, in-process production, finished products, and recording the results.</li> <li>Vets QC Technician trouble tickets and creates JIRA tickets for DSO notification</li> <li>Acts as a resource for colleagues with less experience</li> </ul>	<ul style="list-style-type: none"> <li>checking the video/audio quality</li> <li>Maintains quality standards by approving incoming materials, in-process production, finished products, and recording the results.</li> <li>Vets QC Technician trouble tickets and creates JIRA tickets for DSO notification</li> <li>Formal resource for colleagues with less experience</li> </ul>
<ul style="list-style-type: none"> <li>Problem Solving/ Decision Making</li> <li>Decision making authority</li> <li>Accountability for Financial Results/ Outcomes</li> <li>Involvement in policy determination</li> <li>Analysis and Problem solving</li> <li>Interpretation of Information</li> </ul>	<ul style="list-style-type: none"> <li>Uses standard operating procedures to guide own work and solve standard problems.</li> <li>Normally receives detailed instructions on all work.</li> <li>Makes routine decisions under close supervision</li> <li>Works on assignments that are routine in nature, requiring limited judgment.</li> <li>Has limited impact on own work team; works within standardized procedures and practices to achieve objectives and meet deadlines.</li> <li>Uses existing procedures to identify standard problems; gather information and follow standard practices</li> </ul>	<ul style="list-style-type: none"> <li>Normally follows established procedures on routine work, requires instructions only on new assignments.</li> <li>Evaluates and selects solutions from established operating procedures</li> <li>Works on assignments that are semi-routine in nature but recognizes the need for occasional deviation from accepted practice.</li> <li>Makes routine and non-routine decisions on technical issues, with guidance from leader</li> <li>Solves problems in straightforward situations; assess possible solutions using technical experience, and standard procedures</li> <li>Provides limited impact of the quality of own work and the work of others on the team; works within existing guidelines and policies</li> </ul>	<ul style="list-style-type: none"> <li>Normally receives little instruction on daily work, general instructions on newly introduced assignments.</li> <li>Works on assignments that are moderately difficult, requiring judgment in resolving issues or in making recommendations.</li> </ul>	<ul style="list-style-type: none"> <li>Exercises judgment, based on previous experience, practices and precedents, to identify and solve problems that arise with little or no precedent</li> <li>Acts independently to determine methods and procedures on new assignments. May act as facilitator, formal or informal team leader.</li> <li>Works on assignments requiring considerable judgment and initiative. Understands implications of work, makes solution recommendations.</li> <li>Recommends modifications to daily operations of the work group / team. Outcomes impact the work of the work group / team. Makes needed adjustments to short-term priorities.</li> <li>Acts as a resource for colleagues with less experience</li> <li>Ability to prioritize projects and emerging incidents</li> </ul>

**Table 10 Continued**  
**Example of the Detailed Job Information for Seven Disney Job Family/Job Level Composites**

<p><b>Communications/ Interactions</b></p> <ul style="list-style-type: none"> <li>• Interaction with peers or mgmt at Unit/ Dept/Company level</li> <li>• Customer Service/ Relationships</li> <li>• Internal or external customers</li> </ul>	<ul style="list-style-type: none"> <li>• Interacts with team members and/or managers to exchange routine information related to assigned tasks.</li> </ul>	<ul style="list-style-type: none"> <li>• Interacts with team members and internal peers and may interact with external peers to provide semi-routine information related to assigned tasks.</li> </ul>	<ul style="list-style-type: none"> <li>• Interacts with internal peers and/or managers to exchange semi-complex information related to assigned activities.</li> </ul>	<ul style="list-style-type: none"> <li>• Interacts with internal and external peers and managers to exchange complex information related to areas of specialization.</li> </ul>
<p><b>Specific Knowledge/Skills/ Experience</b></p> <ul style="list-style-type: none"> <li>• Years of work exp</li> <li>• Educ/degree requirements</li> <li>• Business/systems knowledge</li> </ul>	<ul style="list-style-type: none"> <li>• Typically has 0 to 1-year related experience.</li> <li>• Demonstrates proficiency in some, and specialization in a few technical concepts and related processes.</li> <li>• Flexible hours, but must be available to work late nights (until 12pm), weekends, and holidays</li> <li>• Strong understanding of computers and applications</li> <li>• Must have an exemplary attention to detail</li> <li>• Must possess strong communication and organizational skills</li> <li>• A team player, with an enthusiastic, congenial, and committed performance as an employee</li> <li>• A solid computer and technical background, with experience working in new media</li> </ul> <p>Preferred Qualifications:</p> <ul style="list-style-type: none"> <li>• Familiarity with streaming and broadcast media, and spreadsheet applications</li> <li>• Strong understanding of mobile applications and platform devices</li> <li>• High attention to detail</li> <li>• Strong communication skills, including written and verbal</li> <li>• Must have a strong ability to multitask</li> <li>• Familiarity with the company and its products</li> <li>• Streaming video user (live and</li> </ul>	<ul style="list-style-type: none"> <li>• Typically requires a minimum of 1 - 2 years of related experience.</li> <li>• Demonstrates proficiency in most, and in-depth specialization in some, technical concepts and related processes.</li> <li>• Exemplary attention to detail</li> <li>• Strong understanding of computers and applications</li> <li>• Must have an exemplary attention to detail</li> <li>• Must possess strong communication and organizational skills</li> <li>• A team player, with an enthusiastic, congenial, and committed performance as an employee</li> <li>• A solid computer and technical background, with experience working in new media</li> </ul> <p>Preferred Qualifications:</p> <ul style="list-style-type: none"> <li>• Familiarity with streaming and broadcast media, and spreadsheet applications</li> <li>• Strong understanding of mobile applications and platform devices</li> <li>• High attention to detail</li> <li>• Strong communication skills, including written and verbal</li> <li>• Must have a strong ability to multitask</li> <li>• Familiarity with the company and its products</li> <li>• Streaming video user (live and ondemand)</li> </ul>	<ul style="list-style-type: none"> <li>• Typically requires a minimum of 2 - 4 years of related experience.</li> <li>• Demonstrates proficiency in all, and in-depth specialization in most, technical concepts and related processes.</li> <li>• Background in video quality control and is extremely comfortable working in Mac OS X.</li> <li>• Understanding of macOS and Windows operating systems</li> <li>• QC video assets for video/audio fidelity</li> <li>• A solid computer and technical background, with experience working in new media and online organizations.</li> <li>• Familiarity with streaming and broadcast media</li> <li>• Familiarity with Google apps</li> <li>• Ability to recognize video/audio issues</li> <li>• exemplary attention to detail.</li> <li>• solid organizational skills.</li> <li>• must be self-motivated.</li> <li>• must have a strong ability to multitask and adapt to new situations.</li> </ul> <p>Preferred Skills</p> <ul style="list-style-type: none"> <li>• B.A. degree or equivalent</li> <li>• Fluency in languages other than English is a big plus (Dutch, French, Spanish, German, Mandarin, etc)</li> <li>• Background in encoding audio/video for the web</li> </ul>	<ul style="list-style-type: none"> <li>• Typically requires a minimum of 4 - 6 years of related experience.</li> <li>• Demonstrates clear expertise and in-depth working knowledge of all technical concepts and related processes.</li> <li>• strong communication skills.</li> </ul>

**Table 10 Continued**  
**Example of the Detailed Job Information for Seven Disney Job Family/Job Level Composites**

	<ul style="list-style-type: none"> <li>• ondemand)</li> </ul>		<ul style="list-style-type: none"> <li>• An understanding of various video codecs, notably H.264</li> <li>• Familiar with Atlassian's Suite of products (Confluence, Jira)</li> </ul>	
<b>Enabling Experiences for Career Advancement to Next Level</b>	<p align="center"><b>T1 to T2</b></p> <ul style="list-style-type: none"> <li>• Expands skills in own work area within an operational process</li> <li>• Maintains appropriate training as needed</li> <li>• Applies experience and skills to complete assigned work within area of expertise</li> <li>• Works within standard operating procedures</li> <li>• Works with a moderate degree of supervision</li> <li>• Normally follows established procedures on routine work, requires instructions only on new assignments.</li> <li>• Evaluates and selects solutions from established operating procedures</li> <li>• Works on assignments that are semi-routine in nature but recognizes the need for occasional deviation from accepted practice.</li> <li>• Interacts with team members and internal peers and may interact with external peers to provide semi-routine information related to assigned tasks.</li> <li>• Typically requires a minimum of 1 - 2 years of related experience.</li> <li>• Demonstrates proficiency in most, and in-depth specialization in some, technical concepts and related processes.</li> <li>•</li> </ul>	<p align="center"><b>T2 to T3</b></p> <ul style="list-style-type: none"> <li>• Has developed proficiency in a range of processes or procedures through job-related training and considerable on-the-job experience</li> <li>• Completes a variety of atypical assignments, as needed</li> <li>• Works within defined processes and procedures or methodologies and may help determine the appropriate approach for new assignments</li> <li>• Completes work with a limited degree of supervision</li> <li>• Likely to act as an informal resource for colleagues with less experience</li> <li>• Maintains quality standards by approving incoming materials, in-process production, finished products, and recording the results.</li> <li>• Vets QC Technician trouble tickets and creates JIRA tickets for DSO notification</li> <li>• Normally receives little instruction on daily work, general instructions on newly introduced assignments.</li> <li>• Works on assignments that are moderately difficult, requiring judgment in resolving issues or in making recommendations.</li> </ul>	<p align="center"><b>T3 to T4</b></p> <ul style="list-style-type: none"> <li>• Has advanced and specialized expertise in an operational process, typically developed through a combination of job-related training and considerable on-the-job experience</li> <li>• Completes assignments and facilitates the work activities of others; may coordinate work beyond own area</li> <li>• Proposes improvements to processes and methods</li> <li>• Acts as a lead, coordinating the work of others but is not supervisor</li> <li>• Works autonomously within established procedures and practices</li> <li>• checking the video/audio quality</li> <li>• Maintains quality standards by approving incoming materials, in-process production, finished products, and recording the results.</li> <li>• Vets QC Technician trouble tickets and creates JIRA tickets for DSO notification</li> <li>• Exercises judgment, based on previous experience, practices and precedents, to identify and solve problems that arise with little or no precedent</li> <li>• Acts independently to determine methods and procedures on new assignments. May act as facilitator, formal or informal team leader.</li> <li>• Works on assignments requiring considerable judgment and initiative. Understands implications of work, makes solution recommendations.</li> <li>• Recommends modifications to daily operations of the work group / team. Outcomes impact the work of the work group / team. Makes needed adjustments to short-term priorities</li> </ul>	

# **Appendix A**

## **Curriculum Vitae of Dr. Leaetta M. Hough**

## Leaetta M. Hough, Ph.D.

*The Dunnette Group, Ltd.  
370 Summit Avenue  
St. Paul, MN 55102*

*Telephone: 651-227-4888  
Cell: 612-805-8230  
Email: leaetta@msn.com*

---

### **OVERALL IMPACT**

Dr. Hough is known for her independent thinking and work challenging “received wisdom” about what is and is not useful for predicting important outcomes in organizational settings. She is one of the world’s leaders in developing and implementing innovative staffing and performance management tools and systems that are aligned with organizational goals and are compatible with increased diversity in an organization’s work force. She designs new, non-traditional assessment strategies that show a solid payoff and mitigate adverse impact against protected classes. She is an expert in designing and implementing systems to measure people, work and performance.

She is president and founder of the Dunnette Group, Ltd., and a past president of the Society for Industrial and Organizational Psychology (SIOP; a 10,000+ member organization of industrial and organizational psychologists from around the world) and of FABBS (Federation of Associations in Behavioral and Brain Sciences consisting of 26 scientific societies and 64 University affiliates). She was a co-founder of Personnel Decisions Research Institute (PDRI), Minnesota Professionals for Psychology Applied to Work (MPPAW) and Invent Minnesota. She is currently an officer of the Society for Industrial and Organizational Psychology (SIOP) Foundation, and a past board member and officer of FABBS (Federation of Associations in Behavioral and Brain Sciences, U.S. Delegation for Friendship among Women around the World, Regions Hospital Foundation, Personnel Decisions, Inc., A Toast to Bread, and the American Composers Forum.

Dr. Hough received the Society for Industrial and Organizational Psychology (SIOP) Distinguished Professional Contributions award (a life-time career award generally awarded annually to one person) as well as its Scientist-Practitioner Presidential Recognition award. She is a fellow of four professional organizations: Association for Psychological Science (APS), American Psychological Association (APA), APA’s Division 14 (SIOP), and APA’s Division 5 (Division of Evaluation, Measurement, and Statistics). She received FABBS’ “In Honor of” award acknowledging her contributions to the behavioral and brain sciences. She received a Ph.D. from the University of Minnesota Psychology Department in 1981 and was the recipient of its 2020 Distinguished Alumni Award.

Dr. Hough has developed new methods of work analysis, performance measurement systems, selection methods, and personnel coaching, training, and development programs and developed hundreds of assessment and performance measures. Many of these methods (such as the *Accomplishment Record*) are innovative, non-traditional assessment strategies that have shown excellent validities with minimal adverse impact against protected groups.

One of Dr. Hough's most important accomplishments has been her role in resurrecting personality and temperament measures as important predictors of such critical areas of job performance as effort, leadership, innovation, persistence, accountability, engagement, and retention. She and her colleagues were the first to summarize criterion-related validities of personality scales according to both predictor and criterion constructs revealing replicable relationships between personality constructs and appropriate/relevant outcomes. She developed a nomological-web clustering approach to build a better taxonomic structure of personality variables for applied psychology and has, along with her colleagues, proposed working taxons and strategies for using the taxons to produce more useful information than other models of personality. She continues to contribute to the literature about the importance of a construct-oriented approach to predicting work-related outcomes.

She has also made important contributions to the profession through her volunteer work in SIOP. For example, as president of the Society, she initiated in 2005 the *Leading Edge Consortium* (LEC), structuring it to be the annual forum for practice and science to highlight advances in important topical areas for the field of I-O. She also was instrumental in founding and shaping the *I-O Psychology Perspectives on Science and Practice* (IOP) journal into a venue for discussing I-O issues, highlighting contributions from both science and practice. Both LEC and IOP continue to have significant influence in the field of I-O. In addition, as president, she led a strategic planning process and articulated the vision, mission, and values that guided and focused the Society's activities for over a decade. She was a member of the SIOP task force that articulated SIOP's guidelines and principles for the use of artificial intelligence for personnel decisions – SIOP's *Considerations and Recommendations for the Validation and Use of AI-Based Assessments for Employee Selection*, issued January 2023.

Hough has been a very active contributor to the scientific and professional literature. She has published dozens of articles in refereed journals, book chapters, and reviews. Noteworthy has been her role as co-editor of the four-volume *Handbook of Industrial and Organizational Psychology*, lead author of the personnel selection chapter for the *Annual Review of Psychology*, the biodata chapter in the *Handbook of Workplace Assessment: Selecting and Developing Talent*, and personality chapters in the *International Handbook of Work & Organizational Psychology*, the *Handbook of Personnel Selection*, both editions of the I-O Psychology volume of the *Comprehensive Handbook of*, and the *APA Handbook on Testing and Assessment*.

Three of her articles were reprinted in *Employee Selection and Performance Management*, a book consisting of articles that I-O psychologists identified as seminal publications in the last 100 years. Her work has helped shape the science and practice of I-O Psychology.

## **EDUCATION**

- 1965** Bagley High School, Bagley, MN – Valedictorian; National Honor Society; State Speech Alternate (Extemporaneous Poetry); “Outstanding Vocal Performance” (Tristate – Minnesota, Iowa, Wisconsin)
- 1970** University of Minnesota, Minneapolis, MN  
*BA*, Sociology/Economics – Summa Cum Laude; Phi Beta Kappa (1969)

- 1973** University of Minnesota, Minneapolis  
MA, Psychology
- 1981** University of Minnesota, Minneapolis  
Ph.D., Major: Industrial-Organizational Psychology  
Minor: Differential Psychology, Measurement, Statistics, and Personality

## **PROFESSIONAL WORK HISTORY**

- 1996 to Present**      **The Dunnette Group, Ltd.**  
Founder & President
- 1982 to Present**      **Department of Psychology (I-O) University of Minnesota**  
Adjunct Appointment
- 2013 to 2016**        **HirePayoff**  
Co-founder & Chief Science Officer
- 1975 to 1995**        **Personnel Decisions Research Institutes, Minneapolis**  
Co-founder, Chief Financial Officer, & Research Psychologist  
Executive Vice President  
Vice President
- 1971 to 1975**        **Marvin D. Dunnette**  
Editorial Assistant for Dunnette's first *Handbook of I-O Psychology*
- 1973 to 1974**        **University of Minnesota, Minneapolis, Department of Psychology**  
Teaching Assistant
- 1970 to 1973**        **Personnel Decisions, Inc.**  
Research Assistant
- 1969 to 1970**        **University of Minnesota, Minneapolis**  
Administrative Fellow for Professors John Campbell and Marvin Dunnette

## **LEADERSHIP ACTIVITIES & HONORS**

- **SIOP (Society for Industrial & Organizational Psychology)**
  - Scientist-Practitioner Presidential Recognition Award, 2019
  - Distinguished Professional Contributions Award (life-time achievement award), 2016
  - Past President, 2006
  - President, 2005
  - President-elect, 2004

- Chair, General; *SIOP Leading Edge Consortium – Leadership at the Top: Selection, Globalization, and Ethics of Executive Talent*, 2005
  - Chair, General; *SIOP Leading Edge Consortium – Enabling Innovation in Organizations*, 2007
  - Chair, Election Committee, 2006
  - Chair, Awards Committee, 2011 to 2013
  - Founded SIOP's KARE (Katrina Aid & Relief Effort), 2005; State of Louisiana Senate passed resolution honoring SIOP for its contributions
  - Chair, Fellowship Committee, 2002 to 2004
  - Member, SIOP Taskforce on Artificial Intelligence and Selection; 2021 to 2023; resulted in two SIOP-approved documents:
    - *Considerations and Recommendations for the Validation and Use of AI-Based Assessments for Employee Selection* (2023)
    - *Guidance on the Effective Use of AI-Based Assessments for Hiring* (2022)
  - Member, SIOP Taskforce on Personality Importance and Measurement, 2020 to present
  - Member, Fellowship Committee, 1994 to 1997
  - Member, Awards Committee, 1991
  - SIOP Police Initiative Committee, 2015 to 2018
  - SIOP *Principles* – Committee member, 2015 Revision
  - SIOP *Principles* – Advisory Panel member, 2003 Revision
  - Distinguished Case Review Panel, 1995 to 1996, *Ethical Practice of Psychology of Organizations*, Lowman (Ed.), 1998
  - Member, Program Review Committee, 1996
  - Fellow, 1995
  - Member, Scientific Affairs Committee, 1990 to 1991
- **SIOP Foundation**
    - Treasurer, board member, 2017 to present
    - Trustee/board member, 2012 to present
    - Chair, SIOP Foundation Awards Task Force, 2018 to 2019
    - Co-chair, SIOP Foundation Awards Implementation Task Force, 2019 to 2023
- **APA (American Psychological Association)**
    - Fellow, 1995
    - Fellow, APA Division 5, Evaluation, Measurement, & Statistics
    - Fellow, APA Division 14, Society for Industrial and Organizational Psychology (SIOP)
    - APA Committee on Psychological Tests and Assessment, 1996 to 2000
    - APA Test User Qualifications Task Force, 1998 to 2000
    - Member, APA Amicus Brief Committee - Soroka v. Target, 1992

- Chair, Fellowship Committee, APA Division 5 (Evaluation, Measurement, & Statistics), 2004 to 2005
- Member, Fellowship Committee, APA Division 5 (Evaluation, Measurement, & Statistics), 2003 to 2004
- Member, APA Division 19, Military Psychology
- **FABBS (Federation of Associations in Behavioral and Brain Sciences)** – Federation of 26 scientific societies and 64 University affiliates
  - Member, Finance Committee, 2023 to present
  - Treasurer, 2018 to 2022
  - Received “In Honor of” award recognizing contributions to the behavioral and brain sciences, 2015
  - Past President, 2010 to 2011
  - President, 2008 to 2009
  - President-elect, 2006 to 2007
  - Board Member (including FABBS Foundation), 2005 to 2022
- **APS (Association for Psychological Science)**
  - Charter Member
  - Fellow, 1995
- **University of Minnesota**
  - Department of Psychology’s 2020 Distinguished Alumni Award
  - Phi Beta Kappa, 1969
- **National Academy of Sciences**
  - Committee member, Committee on Measuring Human Capabilities: Performance Potential of Individuals and Collectives
  - Book published: National Research Council. (2015). *Measuring Human Capabilities: An Agenda for Basic Research on the Assessment of Individual and Group Performance Potential for Military Accession*. Lead author (with Kyllonen & Oswald) of chapter entitled “Adaptability and Inventiveness.”
- **Other Professional Organizations**
  - Summit Group, 2000 to present
  - California Psychological Association’s Award for Contributions to Industrial/Organizational Psychology, 2001
  - Minnesota Professionals for Psychology Applied to Work (MPPAW)
    - Co-founder, 1998
    - Steering committee, 1998-1999
    - Member, 1998 to present

- **Federal Agencies/Departments and Other Associations**
  - Member, Advisory Board, Association of American Medical Colleges (AAMC), 2012 to 2014
  - Member, Advisory Board (Board of Examiners), U. S. Department of State, 2007 to 2012
  - Member, Oversight Committee – development of selection standards for entry-level firefighter position, New York City; U.S. Department of Justice, 2010 to 2013
  - Member, Oversight Committee – development of selection standards for entry-level police officer position, Nassau County, New York; U.S. Department of Justice, 1992 to 1995; 1997
  - Member, Advisory Board, U.S. Department Justice, 2000
  - National Skill Standards Board (NSSB) Technical Advisory Group & Endorsement Review Panel, 1999 to 2003
  - National Skill Standards Board (NSSB) Expert Panel on Assessment, 1999
- **Other For-Profit & Not-For-Profit Organizations**
  - Director, Regions Hospital Foundation, 2015 to 2022
    - Executive Committee, 2017 to 2022
    - Chair, Nominating Committee, 2015 to 2022
  - Co-founder & Director, Invent Minnesota, 2007 to 2016
  - Co-founder & Director, Clarence Johnston Society, 2011 to present
  - Member, Minnesota Women’s Economic Roundtable, 1991 to 2022
  - American Composers Forum, 1997 to 2013
    - Director & Vice President, 2011 to 2013
    - Executive Committee member, 2011 to 2013
    - Chair of Governance Committee, 2007 to 2011
    - Chair of Personnel Committee, 1997 to 2004
    - Board member, 1997 to 2013
  - Officer, U. S. Delegation for Friendship Among Women Around the World, 1990 to 2011
    - Cuba, 2002
    - Western Samoa and Tonga, 1995
    - Albania and Hungary, 1993
    - Yemen, Oman, and Morocco, 1990
  - Director & Officer, A Toast to Bread, Ltd., 1988 to 2003
  - Director, Personnel Decisions International, 1994 to 1998
  - Director & Officer, Personnel Decisions Research Institutes, Inc., 1975 to 1995
- **Journals** – Associate Editor, Consulting Editor, Review Board, Reviewer
  - *Journal of Applied Psychology*, Consulting Editor, 1994 to 2015

- *Industrial and Organizational Psychology: Perspectives on Science and Practice*, Editorial Review Board, 2008 to present
- *International Journal of Selection and Assessment*, Editorial Review Board, 2001 to 2006
- *Journal of Business and Psychology*, Editorial Review Board, 2012 to present
- *Journal of Organizational Behavior*, Associate Editor, 1991 to 1999
- *Organizational Behavior and Human Decision Processes*, Editorial Review Board, 1998 to 2005
- *Human Performance*, Occasional Reviewer
- *Journal of Counseling Psychology*, Occasional Reviewer
- *Journal of Personality*, Occasional Reviewer
- *Personnel Psychology*, Occasional Reviewer
- *Psychological Bulletin*, Occasional Reviewer

## **CONSULTING PROJECTS**

### ***Integrated HRM Systems, Organizational Change, Organizational Restructuring Projects***

- Directed project involving entire NYNEX Family of Companies (now Verizon) during its restructuring efforts.
  - Developed competency model that addressed needed changes in corporate structure and culture.
  - Designed integrated HRM systems including selection, performance appraisal, training and development, and succession planning for all management and executive levels in all functional areas that reinforced needed change and aligned with organizational goals.
  - Involved survey development and administration, data analysis, system design, and implementation.
  - Time period: Early 1990s.
- Directed development of organization-wide competency model & integrated HRM systems and tools for Microsoft.
  - Identified organization-wide success factors as well as unit-specific areas of competence, roles, and responsibilities.
  - Developed integrated system of tools for recruitment, selection, project staffing, performance appraisal, 360° feedback, training, development, career planning, and promotion.
  - Design emphasized flexibility and adaptability, enabling performance management activities to continually align and reinforce organizational goals.
  - Time Period: Mid and late 1990s.

- Developed competency model and integrated HRM systems and tools for all SONY Corporation of America managers and executives.
  - Identified new behaviors and skills needed for SONY to achieve its vision of delivering electronic services through a then newly emerging technology.
  - Identified organization-wide success factors.
  - Identified unit-specific technical competencies.
  - Included performance evaluation, 360° feedback, training guides, and career planning and development.
  - Required working with SONY information technology (IT) specialists and other contractors to design features and functionality of an intranet delivery system.
  - Time Period: Late 1990s.
  
- Developed company-wide competency model and performance appraisal tool relevant for entry-level through lower-level management for Thomson Corporation.
  - Incorporated Thomson's strategic initiative in the area of e-commerce.
  - Integrated all HRM systems in and for a frequently changing environment.
  - Highlighted needed new skills and behaviors.
  - Time Period: Late 1990s.
  
- Developed tools for organizational restructuring for Electric Power Research Institute (EPRI).
  - Identified skills, competencies, and knowledges needed in the new work roles.
  - Developed an *Accomplishment Record* and two self-assessment tools to measure the level of competence of each candidate (i.e., employee) in each of the required skills and competencies.
  - Worked with another contractor to deliver the tools via the company intranet.
  - Time Period: Mid 1990s.
  
- Developed and implemented a practical and valid promotion and performance management system for the U.S. General Accounting Office (GAO) administrative, professional, management, support, and skilled trade positions.
  - 74 different job series characterized by:
    - Multiple job families (from skilled trade positions such as electricians, locksmiths, and forklift operators to professional positions such as psychologists, editors, and librarians).
    - Diverse job responsibilities within job series (positions in each series range from entry level to middle management).
    - Geographic diversity (locations included Europe and Asia).
  - System addressed:
    - Great diversity of work.
    - Validity, regardless of the small number of incumbents in some job series.
    - Validity and reliability, despite changing work and organizational structure.

- Validity and reliability of performance ratings for compensation, training, and promotion decisions.
  - Project team developed a hybrid validation strategy:
    - Integrated the theoretical underpinnings of both content and component (synthetic) validation.
    - Ensured the job-relatedness of the promotion and performance management system for positions in a diverse and changing community.
  - Considerable organization, coordination, communication, innovative problem solving, and technical expertise were required.
  - Time period: Late 1980s.
- Developed and implemented performance management system for U.S. General Accounting Office (GAO) lawyers.
  - Included development and implementation of selection, performance appraisal, promotion, training and development, and performance-based compensation systems.
  - Involved task and job analysis, behavioral analysis, organizational analysis, training needs analysis, systems development, and documentation.
  - Required significant and sensitive discussions with senior executive service (SES) level managerial attorneys to ensure the acceptability, practicality, and utility of the entire performance management system.
  - Time period: Mid 1980s.
- Developed methodology and directed project team that identified managerial competencies and validated the components of the U.S. Army Civilian Career Evaluation System (ACCES) and Training, Education, and Development System (ACTEDS) for all civilian manager positions in the supply, materiel maintenance, and transportation management career programs.
  - Included designing centralized, computerized evaluation and referral system for staffing and training.
  - Resulted in centralized, computerized evaluation and referral system for:
    - Selecting and promoting civilian managers.
    - Enhancing relevancy of training provided to the Army's civilian work force.
  - Procedures (both technical and administrative) and analyses the team developed were used as the model for developing content valid, legally defensible selection, promotion, and training components for other Army civilian career programs.
  - Required considerable technical and managerial skill.
    - Communication and coordination among the participants, their top management, and the research staff were critically important.
    - Project team was sizable, geographically dispersed, and consisted of research staff from four different organizations.
    - Job incumbents were located worldwide and numbered several thousand.

- Job analysis included empirically identifying job groupings (26).
- Time period: Mid 1980s.

### ***Identification of Future Skill Sets/Competencies***

- Member of National Academy of Sciences (NAS) National Research Council committee established to address current and future state-of-the-science strategies for measuring individual capability and collective capacity. Committee charged with going beyond tests of cognitive ability and personality to identify new and unique methods for measuring individual capabilities that predict individual and collective performance.
  - Lead author of the chapter on measuring characteristics predictive of creativity and innovation.
  - Time period: Early and mid-2010s.

### ***Expatriate/International Consulting Projects***

- Developed and validated *Global Mindset Inventory* for Thunderbird School of Global Management's Najafi Global Mindset Institute.
  - Refined the construct "Global Mindset."
  - Conceptualized as the ability to influence individuals, groups, organizations, and systems that are unlike those of the leader, "Global Mindset" consists of three broad dimensions: *Intellectual Capital*, *Psychological Capital*, and *Social Capital*.
  - Hough and her colleagues developed an item pool and analyzed four major data sets to derive scales to measure these broader dimensions.
  - Project team analyzed performance data (criteria) against which to criterion validate the Global Mindset scales, providing additional evidence of the nomological net and construct validity of the scales.
  - Thunderbird School of Global Management built a Global Mindset Institute, renamed Najafi Global Mindset Institute, to educate and consult with industry using the concepts defined and measured by the *Global Mindset Inventory*.
  - Time Period: Late 2000s (first decade, late).
- Directed project for AT&T that developed valid predictors of successful job performance and personal adjustment of U.S. managers and professionals living and working abroad.
  - Identified 11 factors contributing to an individual's adjustment and success both on and off the job.
  - Developed strategies and items ("Foreign Assignment Career Decisions Inventory", interview, and rating and scoring guidelines) to measure the 11 individual difference variables.
  - Tools were used to:
    - Identify persons likely to perform effectively abroad;
    - Identify persons likely to adjust to living abroad, and

- Counsel people about difficulties they are likely to encounter while working abroad.
- Time period: Late 1980s.

### ***Personnel Selection, Credentialing, Promotion, & Performance Evaluation Projects***

- Member of expert advisory committee to the Association of American Medical Colleges (AAMC).
  - Charged with helping AAMC respond to the changing medical practice model of an individual physician practicing within an often fragmented, hierarchical structure towards a more team-based, collaborative approach to providing health care.
  - Investigated strategies (such as situational judgment inventories and accomplishment record inventories) and constructs (such as teamwork and interpersonal effectiveness) to predict medical training performance and actual physician effectiveness better than measures of cognitive ability (i.e., MCAT) alone.
  - Time period: Early 2010s.
- Worked with Corporate Executive Board (CEB).
  - Developed valid cognitive, situational judgment, and non-cognitive predictors of “Challenger” sales behavior.
  - Developed tools for identifying developmental needs and providing feedback for sales personnel.
  - Time period: Early 2010s.
- Worked with North Central Ministry Development Center and Midwest Ministry Development to identify ministerial competencies (such as resiliency, self-management, conflict management/resolution, problem solving, communication, relationship building, and self-awareness, and leadership) that could be used to evaluate ministerial effectiveness in religious communities. Time period: Early 2010s.
- Worked with Boalt School of Law (project directors Marjorie Shultz and Shelly Zedeck) to successfully define, measure, and predict law school performance and successful lawyering with validity similar to college grades and the Law School Admission Test (LSAT) but with less adverse impact using:
  - Situational judgment inventory,
  - Personality scales, and an
  - Accomplishment record/experience inventory.
  - Time period: Entire first decade 2000s.
- Worked with Golden Gate University School of Law (in conjunction with Marjorie Shultz) to confirm the fairness for protected groups of law school applicants of the Accomplishment and Experience Record (AER) developed in the Boalt School of Law project. Time period: Early 2010s.

- Defined the core competencies of community-oriented police behavior and developed a prototype test battery to predict effective community-oriented policing. Work performed for Community Policing Consortium, Office of Community Oriented Policing Services (U.S. Department of Justice).
  - Identified relevant experts and gathered extensive information (published and unpublished).
  - Summarized information to define core competencies of effective community-oriented policing.
  - Identified and evaluated existing (commercially available) tests to identify tests that measure the core competencies.
  - Recommended a set of tests that capture the essence of hiring in the spirit of service.
  - Time period: Early 2000s (first decade, early).
- Conducted “Hiring in the Spirit of Service” demonstration project designed to change public policy and policing activities (crime prevention and law enforcement) through proactive involvement with citizens and neighborhoods.
  - Involved working with the Community Policing Consortium (CPS), a partnership of five leading police organizations in the United States, i.e., International Association of Chiefs of Police (IACP), National Organization of Black Law Enforcement Executives (NOBLE), National Sheriffs’ Association (NSA), and Police Executive Research Forum (PERF), and the Police Foundation (PF).
  - Included evaluation and recommendations for improving the hiring practices and performance management practices of King County Sheriff’s Office (KCSO).
  - Advanced the understanding and practice of community policing.
  - Time period: Early 2000s (first decade, early).
- Worked with Caliber Associates and OPM to define, measure, and predict (using fair and valid measures) effectiveness of administrative law judges (ALJs).
  - Included an *Accomplishment Record*, rating scales, and reference check (verification of accomplishments).
  - Included a structured interview and rating scales.
  - Time period: Mid 2000s (first decade, mid).
- Member of 3-person, expert advisory panel to National Skill Standards Board (NSSB) which was created in 1994 when Congress enacted the National Skill Standards Act.
  - NSSB was charged with developing a national, skill standards and credentialing system that industries throughout the U.S. would endorse and use.
  - U.S. economy was segmented into 15 industry clusters (e.g., manufacturing, sales and service, information and communication technology, education and training, and so forth).

- Expert advisory panel oversaw development of unified skill standards for work performance throughout the U.S. economy, ensuring that the industry coalitions' work products accomplished the goals of the National Skills Standards Act.
  - Skill standards needed to provide:
    - Linkages and paths to training and curriculum development.
    - Diagnostic and continuous improvement feedback to participants.
    - Information about types and levels of skills, knowledge, and performance valued and required in the workplace.
    - Foundation for development of valid measurement systems.
  - Credentialing system for each industry coalition had to be:
    - Valid and fair for all workers and potential workers.
    - Legally defensible.
  - Time period: Late 1990s and early 2000s.
- Worked with NASA and colleagues at Michigan State University to identify valid predictors of astronaut team cohesiveness and effectiveness for long-duration missions to outer space. Time period: late 1990s.
  - Member of 3-person oversight committee that provided expert technical advice and direction to GTE Corporation (now Verizon) and Personnel Decisions Research Institutes in their development of a computerized, criterion-valid selection system for all GTE non-management employees. Time period: Late 1990s and early 2000s.
  - Directed PDRI's development and implementation of the *Universal Test Battery (UTB)* for Bell Atlantic (now Verizon) – first fully automated criterion-valid personnel selection and placement system in the U.S. The computer administered *UTB* measured core skills, abilities, temperament characteristics, and interests important for success for all non-management positions in the company. Accomplishments included:
    - Development of a single job description instrument appropriate for the entire spectrum of 101 specific non-exempt jobs.
    - Design of an interpretive strategy for use by lay persons in summarizing hundreds of job elements according to eleven job families.
    - Development of a practical, empirically based job family structure.
    - Development of job specific performance appraisal forms for all 101 jobs.
    - Development of measures (including parallel forms) of ability, skill, and personality characteristics required in the different job families.
    - Development and implementation of software to manage the administration, scoring, and reporting of *UTB* results.
    - Coordination and management of all data collection, analyses, and interpretation for job analysis, predictor measures, criterion constructs, and criterion-related validities, and fairness analyses for all job families.

- Development and operational implementation for on-going database management procedures.
- Training of company employees in how to use and manage the system.
- On-schedule implementation despite severe time constraints; the time span from beginning of validation study to full scale, company-wide implementation was sixteen months.
- Time Period: Early 1990s.
- Worked with the Navy Personnel Research and Development Center (NPRDC) in a joint services effort to incorporate the new Army personality scales and tests developed by NPRDC into the U.S. Armed Services selection system.
  - Developed strategies to detect and deter intentional distortion of self-report measures.
  - Time period: Early 1990s.
- Headed the “non-cognitive” project team of Project A (a 3-organization consortium project funded by the U.S. Army Research Institute for the Behavioral and Social Sciences (ARI) devoted to developing predictors for enlisted personnel in the Army).
  - Conducted comprehensive literature review of criterion-related validities of personality, interest, biodata, and physical fitness measures for predicting work-related criteria.
  - Aggregated data across personality measures within constructs providing first replicable evidence that criterion-related validities, when summarized within personality constructs, correlated with appropriate work-related criterion constructs.
  - Developed psychometrically sound measures of non-cognitive variables.
  - Conducted experimental and field studies of effects of intentional response distortion to items in the personality inventory on criterion-related validity.
  - Others demonstrated in a criterion-related validity involving thousands of soldiers that personality variables predict theoretically related, will-do criteria (e.g., effort, dependability, and personal discipline) better than cognitive ability measures.
  - Time period: Entire 1980s.
- Developed performance appraisal (behavior summary) rating scales for Army Brigade Commander and Program Manager positions.
  - Used critical incident methodology to analyze general-level positions.
  - Army general officers finalized the job dimensions and rated the effectiveness level of each critical incident.
  - Resulted in behavior summary performance appraisal rating scales for Army Brigade Commander and Program Manager positions.
  - Time period: Mid 1980s.
- Developed prototype selection and behavioral reliability monitoring program for sensitive duty positions for the Defense Nuclear Agency.

- Involved extensive literature review and site visits to learn how government and private organizations with sensitive duty positions develop and administer behavioral reliability programs.
  - Involved interviews with personnel very knowledgeable about reliability programs for such positions as undercover FBI agents, U.S. Marine Corps embassy guards, L.A. SWAT team members, Olympic Games guards, nuclear power plant operators and guards.
  - Resulted in a practical and valid prototype selection and monitoring system.
  - Time period: Early and mid-1980s.
- Developed and content-validated job knowledge promotion exam for Library of Congress police force sergeant position.
    - Identified needed knowledges.
    - Developed content-valid measure of job knowledges.
    - Combined content-valid job knowledge measure and criterion-valid overall predictor to form content-valid composite to predict overall sergeant performance.
    - Time period: Mid 1980s.
- Developed and criterion-validated innovative selection and performance management system for Library of Congress police force – private, sergeant, lieutenant, captain, and civilian head.
    - Conducted job analysis.
    - Developed biodata-task scales, personality scales, interest scales, and behavioral interview protocol and rating scales.
    - Developed content valid performance rating system.
    - New selection system – fair and criterion-valid with little or no adverse impact.
    - Time period: Early 1980s.
- Developed and validated innovative selection and performance management systems for all professional positions (included reference, subject cataloger, descriptive cataloger, acquisition librarians, as well as lawyers, economists, foreign affair analysts, social science analysts, technical information analysts, computer analysts, copyright catalogers, copyright examiners, information specialists, and supervisors) at the Library of Congress.
    - Candidates applied from sites around the world, making traditional cognitive ability testing (at that time) impossible.
    - Developed *Accomplishment Record* inventory and rating scales, biodata inventory, and interests and opinions inventory – “alternative” selection inventories.
    - Developed content valid performance rating system tailored to each profession.
    - New selection system – fair and criterion-valid with little or no adverse impact.
    - Time period: Early 1980s.
- Evaluated criterion-related validity of existing Library of Congress police force selection system.
    - Determined actual system.

- Gathered predictor and criterion data.
- Found little or no criterion-related validity.
- Time period: Early 1980s.
- Developed and validated innovative selection and performance management systems for all professional positions (including lawyers, economists, accountants, managers, research analysts, computer specialists) at the Federal Trade Commission.
  - Professionals objected to traditional psychological (cognitive) testing.
  - Developed *Accomplishment Record* inventory and rating scales, biodata inventory, interest inventory, task and experience inventory, and personality inventory – “alternative” selection inventories.
  - Developed content valid performance rating system tailored to each profession.
  - New selection system – fair and criterion-valid with little or no adverse impact.
  - Time period: Late 1970s.
- Developed new or introduced innovations to existing measurement methods that often involved difficult-to-measure characteristics and hard-to-predict behavior in a wide variety of settings. Examples of measurement methods developed include scored (weighted) application blanks, biodata inventories, accomplishment record inventories, personality inventories, interest inventories, situational judgment inventories, prior experiences inventories, structured interviews and rating scales, task experience inventories, cognitive ability tests, skills tests, work samples, simulations, and performance rating scales. Time period: career.

***Court-involved Selection/Promotion/Pay Equity/Measurement Projects, Cases, & Consent Decrees – Advisor, Litigation Support, & Expert Witness***

- Expert for plaintiff
  - [Confidential]
  - Issue: Testing; discrimination; class action
  - Time period: Ongoing
- Expert witness for plaintiff.
  - Included expert witness report. [Confidential]
  - Case: Rasmussen, et al. v. The Walt Disney Company et al.
  - Issue: Pay equity for women, class action.
  - Time period: Ongoing.
- Expert witness for plaintiff.
  - Included expert witness reports and deposition. [Confidential]
  - Case: Chen-Oster, et al. v. Goldman Sachs & Co.
  - Issue: Pay equity for women, class action.
  - Time period: Early 2010s to early 2020s.

- Expert witness for plaintiff.
  - Included expert witness reports and depositions. [Confidential]
  - Case: Jewett, et al. v. Oracle America, Inc.
  - Issue: Pay equity for women, class action.
  - Time period: Late 2010s to early 2020s.
- Expert witness for plaintiff.
  - Included expert witness reports and depositions. [Confidential]
  - Case: Kelly Ellis, et al. v. Google, LLC.
  - Issue: Pay equity for women, class action.
  - Time period: Late 2010s to early 2020s.
- Expert for plaintiff.
  - Included reviewing documents and providing advice to plaintiffs’ attorneys.
  - Case: Ross, et al. v. Hewlett Packard Enterprise Company
  - Issue: Pay equity for women, class action.
  - Time period: Late 2010s to early 2020s.
- Expert for plaintiff. [Confidential]
  - Provided advice regarding HR audits.
  - Time period: 2020.
- Expert witness for plaintiff.
  - Included expert witness report, deposition, and testimony in court.
  - Provided opinion regarding “alternative” tests – their validity, adverse impact, and availability.
  - Police promotion.
  - Case: Bruce Smith, et al. v. City of Boston
  - EEO discrimination; minorities.
  - Judge stated: This is a profoundly important case, one that evokes the finest of our nation’s aspirations to give everyone equal opportunity and a fair shot.”
  - Time period: Mid 2010s.
- Expert witness for plaintiff.
  - Included expert witness report and deposition. [Confidential]
  - Provided opinion regarding employment practices used in implementing Section 19 of the FDIA (terminations resulting from failing a background investigation).
  - Provided opinion regarding “alternative” practices.
  - Case: Cara Williams, et al., v. Wells Fargo, N.A.
  - EEO discrimination; minorities.
  - Time period: Mid 2010s.

- Expert for U.S. Department of Justice.
  - Worked with opposing experts, monitoring their work to develop a fair and valid selection system that had less adverse impact and was legally defensible.
  - Entry-level police.
  - Case: U.S. v. Lubbock Texas Police Department.
  - EEO discrimination; Latinos.
  - Time period: Mid 2010s.
  
- Expert advisor to City of Pittsburgh.
  - Overseeing E.B. Jacobs' revision of entry-level police selection system.
  - Overseeing and monitoring implementation.
  - Case: James M. Foster, Sharp, et al. v. City of Pittsburgh – settlement.
  - EEO discrimination; minorities.
  - Time period: Mid 2010s.
  
- Neutral expert for the City of Pittsburgh, the American Civil Liberties Union – Pennsylvania (ACLU-PA), and Feinstein Dole Payne & Kravec (FDPK) law firm.
  - Evaluated City of Pittsburgh's entry-level police selection system.
  - Required interviewing police officers and their supervisors and the highest-level officers, civil servants, elected officials, and community representatives – gaining their trust and confidence that Hough was/is neutral (unbiased, objective) and knowledgeable (an expert) in matters related to personnel selection and how to reduce adverse impact against protected classes.
  - Required diplomacy in dealing with parties involved in a highly charged, highly visible lawsuit.
  - Recommended changes to increase validity and reduce adverse impact against minorities that were acceptable to all parties.
  - Lawsuit settled; settlement required that Hough continue to be the neutral expert overseeing the revision and implementation of a new selection system.
  - Case: James M. Foster, Sharp, et al. v. City of Pittsburgh.
  - EEO discrimination; minorities.
  - Time period: Early to mid-2010s.
  
- Reviewed and evaluated validity studies and selection practices for conformance to legal and professional guidelines and standards for [Confidential] County in [Confidential]. Time period: Mid 2010s.
  
- Expert witness for U.S. Department of Justice. Member of court-ordered expert team to develop new, valid, entry-level selection system for the City of New York fire department (NYFD).
  - City had hired virtually all white, male firefighters after the loss of many firefighters during the terrorist attack on the twin towers of the World Trade Center.

- Worked with court-appointed master, Psychological Services, Inc. (PSI) experts, Vulcan Society's (Black firefighter union) expert, other U.S. Department of Justice experts, and NYC representatives to develop and validate new selection system.
- Significant technical and interpersonal skill required to deal with variety of stakeholders and experts in highly charged situation.
- Case: United States, Vulcan Society, and Candido Nunez, et al. v. City of New York, et al.
- EEO discrimination; minorities.
- Time period: Early 2000s (first decade and early 2010s).
- Expert witness for U.S. Department of Justice. Member of court-ordered expert team to develop new, valid, entry-level selection system for Nassau County Police Department (NCPD).
  - Nassau County had been involved in years of litigation and had conducted three previous criterion-related studies that they had been unsuccessful in defending.
  - Worked cooperatively with other experts to develop a fair and valid selection system that had less adverse impact and was legally defensible.
  - Case: United States, Nassau County Guardians Assoc., Inc., Nassau County Police Hispanic Society, Terrence Clyburn, et al., and Anibal Aponte v. Nassau County, and the Nassau County Police Department.
  - EEO discrimination; minorities.
  - Time period: Early and mid-1990s.
- Expert for the U.S. Department of Justice; included writing expert witness reports and rebuttals, providing under-oath testimony in depositions and in court. Additional cases:
  - United States v. Jacksonville Fire & Rescue Department, Jacksonville, FL.
    - Promotion to Firefighter Engineer, Lieutenant, Captain, and District Chief positions.
    - EEO discrimination case, African Americans.
    - Settled 2017.
    - Time period: Mid 2010s.
  - United States v. City of Erie, PA.
    - Entry-level police.
    - EEO discrimination case; minorities.
    - Time period: Early and mid-2000s (first decade, early and mid).
  - United States v. City of Los Angeles, CA.
    - Entry-level fire.
    - EEO discrimination case, minorities.
    - Time period: Early 2000s (first decade, early).
  - United States v. City of Garland, TX.
    - Entry-level police and fire.

- EEO discrimination case; minorities.
    - Time period: Late 1990s and early 2000s.
  - United States v. City of Belleville, IL.
    - Entry-level police and fire.
    - EEO discrimination case; minorities.
    - Time period: Mid and late 1990s.
  - United States v. City of Torrance, CA.
    - Entry-level police and fire.
    - EEO discrimination case; minorities.
    - Time period: Mid 1990s.
  - United States v. City of Atlanta, GA.
    - Entry-level fire.
    - EEO discrimination case; minorities.
    - Time period: Early 1990s.
- Reviewed and evaluated documentation and validation studies submitted to Office of Federal Contract Compliance Programs (OFCCP) of the Department of Labor (DOL) for compliance with professional and legal guidelines and principles:
  - By Procter & Gamble (P&G) in support of its personnel practices for a variety of jobs.
  - By Kimberly-Clark in support of its personnel selection practices for plant technician jobs.
  - Time period: Mid 2000s (first decade, mid).
- Advisor to Caliber, Associates project team in their activities to develop selection procedures for five classes of jobs in the Waste Water Treatment job family for the Personnel Board of Jefferson County of Alabama, which was involved in a long-standing consent decree and court order.
  - Included job analysis, test development, and validation studies (content validity and transportability methodologies).
  - Required significant technical and interpersonal skill to deal constructively with teams of lawyers and several sets of experts with different and often opposing interests.
  - Time period: Early and mid-2000s (first decade, early and mid).
- Expert consultant for plaintiff regarding validity of existing selection system and validity and availability of “alternative” tests.
  - Entry-level fire.
  - Case: Lewis v. City of Chicago.
  - EEO discrimination; minorities.
  - Time period: Early 2000s (first decade, early).
- Expert witness for plaintiff (Douglas A. Hedin law firm).

- Case: Karen Feist v. Nash Finch Company.
- EEO discrimination; gender; promotion.
- Time period: Mid 1990s.
- Developed content-valid, fair, panel interview to select entry-level firefighters for Minneapolis Fire Department that was acceptable to the fire department, plaintiff class, and a diverse constituency.
  - Developed interview questions and rating scales sensitive to the diverse cultural backgrounds of applicants.
  - Actual and perceived fairness – critically important.
  - Worked successfully with all parties – Fire Department, Office of the City Attorney, attorney for the plaintiff class, expert for the plaintiff class, Civil Rights Commission representatives, a steering committee composed of minorities and women, and Minneapolis City Council – to resolve many polarized and politicized issues.
  - Case: Gerald Carter, et al. v. Hugh Gallagher, et al. (Minneapolis Fire Department); settled.
  - Time period: Early 1990s.
- Member of American Psychology Association’s (APA) committee that wrote amicus brief in support of testing.
  - Soroka v. Target Corporation.
  - Conducted literature search; meta-analyzed criterion-related validities of Minnesota Multiphasic Personality Inventory (MMPI) and California Psychological Inventory (CPI) inventories for predicting job performance in protective service positions.
  - Time period: Early 1990s.
- Expert witness for plaintiff (Heart of the Earth Survival School) who charged U.S. Department of Education with using an unfair measurement system to evaluate its grant proposal.
  - Case involved use of score adjustments – raters’ evaluations of proposals were adjusted to correct for leniency and other rating errors.
  - Examined effects of score adjustments given small samples and extreme scores.
  - Case: Heart of the Earth Survival School v. U.S. Department of Education.
  - Time period: Early 1990s.
- Expert consultant for defendant charged with bias against placing women in higher paid jobs.
  - Developed gender-neutral standard for classifying applicants.
  - Compared and evaluated company decisions against standard.
  - EEO discrimination; gender; promotion.
  - Time period: Mid 1980s.

- Member of a team that examined whether a large multi-national, non-U.S. organization paid three, male American employees less than their Japanese counterparts for work that required similar skill, effort, responsibility, and working conditions.
  - Charges brought under Equal Pay Act and Title VII of the 1964 Civil Rights Act.
  - Case: Michael E. Spiess, Jack K. Hardy and Benjamin F. Rountree v. C. Itoh & Co. (America) Inc.
  - Time Period: Early 1980s.
  
- **Arbitration cases:**
  - Expert witness for Association of Administrative Law Judges (AALJ) to describe the methodology and results of a work analysis study designed to determine the amount of time required to adjudicate adult disability cases in accordance with Social Security Administration (SSA) guidance and guidelines about legally sufficient decisions.
    - Issue: SSA requires ALJs to adjudicate a minimum of 500 adult disability cases and/or to schedule at least 50 hearings per month or lose the right to telework.
      - AALJ v. SSA, Office of Disability Adjudication and Review (ODAR)
      - AALJ (Judge Moises Penalver; NYC) v. SSA, ODAR.
      - AALJ (Judge Kathleen Harrington; New Haven) v. SSA, ODAR
      - AALJ (Judge Jerry Meade; Huntington, WV) v. SSA, ODAR
      - AALJ (Judge Francis Hurley; Boston) v. SSA, ODAR
      - AALJ (Judge Bryce Baird; Buffalo) v. SSA, ODAR
      - AALJ (Judge Bryce Baird, different grievance; Buffalo) v. SSA, ODAR
      - AALJ (Judge Margaret Donaghy; Queens) v. SSA, ODAR
    - Time Period: Mid to late 2010s.
  - Expert witness for claimants charging General Mills, Inc. with age discrimination in its reduction-in-force termination decisions.
    - Issue: claimants argue that they were terminated not because of their job performance but because they were older than their colleagues who were not terminated.
      - Nancy Lykkehoy v. General Mills, Inc.
      - Michael Allard v. General Mills, Inc.
      - David Kirk v. General Mills, Inc.
      - Michael Murray v. General Mills, Inc.
      - Denise Holtz v. General Mills, Inc.
      - Peggy Maxe v. General Mills, Inc.

- Tom King v. General Mills, Inc.
    - Prepared expert witness reports and rebuttal reports. [Confidential]
    - Testified about the existence of negative age stereotypes, their accuracy, and their impact on employment decisions; testified about the susceptibility of General Mills’ talent assessments (i.e., ratings of “potential”) to negative age stereotypes; testified about the validity of General Mills’ ratings of long-term potential; testified about the merits of opposing expert’s “economic theory”.
    - Case settled. [Confidential]
    - Time period: Mid to late 2010s.
- Designed and conducted work/time analysis study and gave expert testimony for the Association of Administrative Law Judges (AALJ), the union representing administrative law judges handling adult disability cases employed at the Social Security Administration (SSA).
  - Issue: AALJ claimed quotas established by SSA for administrative law judges to schedule hearings and adjudicate cases were excessive.
  - Administered work samples (3 cases) to sample of administrative law judges to determine time required to read, decide, and write decision instructions following agency directions regarding legally sufficient decisions.
  - Administered task analysis survey to sample of administrative law judges to determine time required to perform all job-required activities.
  - Testified about study and results to hearing officer.
  - Time period: Mid 2010s.
- Expert witness for defendant (Bell Atlantic Legal Department) involving Bell Atlantic’s use of the *Universal Test Battery (UTB)* to select entry-level applicants.
  - Issue: union argued that *UTB* lacked validity.
  - Prepared report summarizing the 10-volume *UTB* technical report.
  - Testified about the validity evidence in support of the *UTB* and its fairness for all ethnic groups.
  - Time period: Late 1990s.
- Prepared expert report for defendant (Bell Atlantic Legal Department) involving Bell Atlantic’s use of the *Universal Test Battery (UTB)* to select entry-level applicants.
  - Issue: union argued that only measures of “abilities” could be used to select applicants and interpersonal skills were not abilities.
  - Prepared report documenting that the social sciences considered interpersonal skills to be abilities.
  - Time period: Late 1990s.
- Expert witness for defendant (Farrell & Ricci law firm) involving Bell Atlantic’s use of the *Universal Test Battery (UTB)* to select entry-level applicants.
  - Case: Gary Stauffer v. Francine Taylor.

- Age discrimination.
- Prepared expert report documenting the evidence that *UTB* did not discriminate on the basis of age; testified to the same.
- Time period: Late 1990s.

***Evaluation of Staffing Systems, HRM Services, Leadership, Programs, & Organizations (not legal/court-related)***

- Worked with Corporate Executive Board (CEB) to vet testing, assessment, and survey companies for merger and acquisition. Time period: Early 2010s.
- Evaluated NASA astronaut selection system (part of a Congressionally mandated expert review panel) after astronaut Lisa Novak drove cross country from Texas to Florida in diapers to confront and assault a woman who was involved with Novak’s astronaut lover. Time period: Mid 1990s.
- Conducted a national needs assessment for a large financial planning/investment company to improve organizational effectiveness.
  - Identified current and future leadership needs.
  - Identified roadblocks and obstacles that were interfering with meeting key organizational objectives.
  - Identified actions and systems needed to support leaders in achieving their goals.
  - Time period: Mid 1990s.
- Evaluated controversial busing program.
  - Included interviewing students, parents, and teachers about sensitive issues.
  - Involved obtaining difficult-to-get current as well as archival data.
  - Required skill dealing with highly charged issues in highly visible/public situations.
  - Required knowledge of sociological and psychological principles and a variety of measurement methods.
  - Time period: Early 1970s.

***Other Projects***

Dr. Hough has worked closely on the following additional studies:

- Development of selection system for electrical power plant operators. Time period: Late 1970s and early 1980s.
- Evaluation of effectiveness of a very large nationwide retail chain’s Affirmative Action Plan in meeting various staffing requirements and development of new staffing strategy.
  - Identified nontraditional internal sources of talent for redressing EEO imbalances.
    - Developed job description questionnaire to describe all the “timecard” positions; administered questionnaire to stratified random sample of employees; clustered the 70 jobs.

- Identified career opportunities within the company and probable internal sources of labor; identified external labor supply sources.
  - Time period: Late 1970s.
- Reenlistment motivations of first-term enlisted men and women. Time period: Late 1970s.
- Satisfaction and commitment among sales representatives. Time period: Late 1970s.
- Development of selection system for entry-level firefighters (nation-wide project). Time period: Mid and late 1970s.
- Investigation of performance ratings – the reliability, accuracy and relationships between individual differences and rater error. Time period: Mid 1970s.
- Investigation of motivation, morale, and job satisfaction among enlisted personnel in the U.S. Army. Time period: Mid 1970s.
- Evaluation of impact of an “awareness” training workshop designed to educate and alleviate the problems encountered by persons in non-traditional work roles.
  - Evaluated intended and unintended consequences.
  - Developed attitude questionnaires, in-baskets, other role-playing simulations, and an organizational impact questionnaire.
  - Time period: Mid 1970s.
- Development of selection system for entry-level, detective, supervisory, and mid-level command positions for police (nation-wide project). Time period: Mid 1970s.
- Study of Merrill Lynch account executive job. Time period: Mid 1970s.
- Development of a “readiness index” for Navy personnel. Time period: Early 1970s.

## CLIENTS

Altshuler Berzon LLP (Law Firm)  
 Andrus Anderson LLP (Law Firm)  
 Association of American Medical Colleges (AAMC)  
 American Civil Liberties Union, PA  
 American Telephone & Telegraph  
 Aon Consulting  
 Army Research Institute  
 Association of Administrative Law Judges  
 Balch & Bingham, LLP (Law Firm)  
 Bell Atlantic  
 Bernard Jacobs Architects, Ltd.  
 Boalt Hall School of Law (UC Berkeley)  
 Bureau of Naval Personnel  
 C. Itoh Company

Caliber Associates  
Chicago Lawyers' Committee for Civil Rights Under Law, Inc.  
City of Minneapolis Fire Department  
City of Pittsburgh  
Cohen Milstein (Law Firm)  
Consulting Psychologists Press (CPP)  
Corporate Executive Board  
Defense Nuclear Agency  
Defense Supply Service  
Douglas A. Hedin (Law Firm)  
Edison Electric Institute  
Electric Power Research Institute  
Eli Lilly & Company  
Farrell & Ricci, P.C. (Law Firm)  
Federal Trade Commission  
Feinstein Doyle Payne & Kravec, LLC  
Ford Motor Company  
Fulbright & Jaworski (Law Firm)  
Golden Gate University School of Law  
Goldstein Borgen Dardarian & Ho (Law Firm)  
Government of South Africa  
Graham Hollis, APC  
GTE Corporation  
Heart of the Earth Survival School  
HumRRO  
IDS Financial Services  
Institute of Nuclear Power Operations  
International Business Machines, Inc.  
JML, APLC (Law Firm)  
Josten's  
Katz, Marshall & Banks, LLP (Law Firm)  
King County Sheriff's Office  
Klamann & Hubbard, P.A. (Law Firm)  
Leads Corporation  
Library of Congress  
Law Enforcement Assistance Administration (LEAA)  
Leventhal & Associates (Law Firm)  
Lichten & Liss-Riordan, P.C. (Law Firm)  
Lieff Cabraser Heimann & Bernstein, LLP (Law Firm)  
Lockridge Grindal Nauen, P.L.L.P.  
MDA Leadership Consulting  
Merrill Lynch, Pierce, Fenner & Smith  
Microsoft Corporation  
Miles Homes, Inc.  
Minneapolis Public Schools  
Minnesota Department of Economic Security

National Academy of Sciences (NAS)  
National Aeronautics & Space Administration (NASA)  
National Skill Standards Board (NSSB)  
Navy Personnel Research & Development Center  
Newkirk Zwagerman, PLC (Law Firm)  
Nichols Kaster (Law Firm)  
North Central Ministry Development Center  
NYNEX  
Office of Naval Research  
Oppenheimer, Wolff, Foster, Shepard & Donnelly (Law Firm)  
Outten & Golden, LLP (Law Firm)  
Pennsylvania Civil Liberties Union  
Personnel Decisions International  
Personnel Decisions Research Institutes  
Procter & Gamble  
Rudy, Exelrod, Zieff & Lowe, LLP (Law Firm)  
Sears, Roebuck & Company  
Snyder & Brandt, P.A. (Law Firm)  
Sony Electronics Corporation  
Sony Corporation of America  
State of Louisiana  
Target Corporation  
Tennant Company  
Thomson Corporation  
Thunderbird School of Global Management  
U. S. Air Force  
U. S. Army Civilian Personnel Center  
U. S. Army Research Institute for the Behavioral and Social Sciences  
U. S. Civil Service Commission  
U. S. Department of State  
U. S. Department of Labor  
U. S. Department of Justice  
U. S. General Accounting Office  
University of Minnesota  
University of Toronto  
Waterfront International, Ltd.  
West Group  
William Mitchell College of Law  
Zimmerman Reed, LLP

## **PUBLICATIONS**

Hough, L. M. & Oswald, F. L. (in press). Revisiting predictor-criterion construct congruence: Implications for designing personnel selection systems. *Industrial and Organizational Psychology: Perspectives on Science and Practice*.

- Hough, L. M. & Russell, T. (2022). Metrics for Assessing Similarity of Jobs. *Industrial and Organizational Psychology: Perspectives on Science and Practice*, 15, 55-60.
- Hough, L. M. & Oswald, F. L. (2021). Personality determinants of engagement. In J. P. Meyer & B. Schneider (Eds.), *Research Agenda for Employee Engagement in a Changing World of Work* (pp. 67-85). Cheltenham, UK: Elgar Publishing.
- Oswald, F. L., Hough, L. M., & Zuo, C. (2019). Personnel selection and vocational Interests: Recent research and future directions. In C. D. Nye & J. Rounds (Eds.), *Vocational Interests in the Workplace: Rethinking Behavior at Work* (pp. 129-141). New York, NY: Routledge.
- Hough, L. M., & Dilchert, S. (2017). Personality: Its measurement and validity for personnel selection. In J. Farr & N. Tippins (Eds.), *Handbook of Employee Selection*, 2<sup>nd</sup> ed. (pp. 298-325). New York, NY: Routledge – Taylor & Francis Group.
- Hough, L. M. (2017). Review of *Personality and Preference Inventory* (PAPI). In V. Zeigler-Hill & T. Shackelford (Eds.), *Encyclopedia of Personality and Individual Differences*. New York, NY: Springer Publishing Co.
- Hough, L. M. (2017). Marvin D. Dunnette – 20<sup>th</sup> century industrial-organizational psychology icon. In S. Rogelberg (Ed.), *The Encyclopedia of Industrial and Organizational Psychology*, Vol. 1 (pp. 330-332). Thousand Oaks, CA: Sage Publications.
- Heggestad, E. D., & Hough, L. M. (2017). Impression management, faking, and socially desirable responding to self-report personality inventories. In S. Rogelberg (Ed.), *The Encyclopedia of Industrial and Organizational Psychology*, Vol. 1 (pp.). Thousand Oaks, CA: Sage Publications.
- Hough, L. M. (2016). Community-oriented policing: Hiring in the spirit of service. *Industrial and Organizational Psychology: Perspectives on Science and Practice*, 9, 573-582.
- Hough, L. M., Oswald, F. L., & Ock, J. (2015). Beyond the big five – New directions for personality research and practice. In F. P. Morgeson (Ed.), *Annual review of organizational psychology and organizational behavior* (pp. 183-209). Palo Alto, CA: Annual Reviews.
- National Research Council. (2015). *Measuring Human Capabilities: An Agenda for Basic Research on the Assessment of Individual and Group Performance Potential for Military Accession*. Committee on Measuring Human Capabilities: Performance Potential of Individuals and Collectives, Board on Behavioral, Cognitive, and Sensory Sciences, Division of Behavioral and Social Sciences and Education. Washington, DC: The National Academies Press. (Hough, L.M., Kyllonen, P. & Oswald, F. L. Chapter 7: “Adaptability and Inventiveness”, pp. 127-158.)
- Hough, L. M., & Johnson, J. W. (2013). Use and importance of personality variables in work settings. In I. B. Weiner (Ed.-in-Chief) & N. Schmitt & S. Highhouse (Vol. Eds.), *Handbook of psychology: Vol. 12. Industrial and organizational psychology* (pp. 211-243). New York: Wiley.
- Oswald, F. L., Hough, L. M., & Ock, J. (2013). Theoretical and empirical structures of personality: Implications for measurement, modeling and prediction. In N. D. Christiansen & R. P. Tett (Eds.), *Handbook of personality at work* (pp. 11-29). New York, NY: Routledge/Taylor & Francis Group.

- Hough, L. M., & Connelly, B. S. (2012). Personality measurement and use in industrial-organizational psychology. In K. F. Geisinger (Editor-in-Chief), *APA handbook on testing and assessment* and N Kuncel (Vol. 1 Ed.), *test theory and testing and assessment in Industrial and Organizational Psychology (Vol. 1, pp. 501-531)*. Washington, DC: American Psychological Association.
- Hough, L. M., & Muschewske, R.C. (2012). Implications for HR and OD professionals: Can I-O principles and practices contribute to the achievement of corporate environmental sustainability? In S. Jackson, D. Ones, & S. Dilchert (Eds.), *Managing human resources for environmental sustainability*. New York: Wiley & Sons, Inc.
- Oswald, F. L., & Hough, L. M. (2012). I-O 2.0 from Intelligence 1.5: Staying (just) behind the cutting edge of intelligence theories. *Industrial and Organizational Psychology: Perspectives on Science and Practice, 5*, 172-175.
- Oswald, F. L., & Hough, L. M. (2011). Personality and its assessment in organizations: Theoretical and empirical developments. In S. Zedeck (Ed.), *APA handbook of industrial and organizational psychology: Vol. 2. Selecting and developing members for the organization* (pp. 153-184). Washington, DC: American Psychological Association.
- Gernsbacher, M. A., Pew, R., Hough, L. M., & Pomerantz, J. (Eds.) (2011). *Psychology and the real world: Essays illustrating fundamental contributions to society*. New York, NY: Worth Publishers.
- Hough, L. M. (2010). Assessment of background and life experience: The past as prologue. In J. Scott & D. Reynolds (Eds.), *Handbook of Workplace Assessment: Evidence-based Practices for Selecting and Developing Organizational Talent* (pp. 109-139). New York: Wiley & Sons, Inc.
- Hough, L. M., & Dilchert, S. (2010). Personality: Its measurement and validity for personnel selection. In J. Farr & N. Tippins (Eds.), *Handbook of Employee Selection* (pp. 299-319). New York, NY: Routledge – Taylor & Francis Group.
- Oswald, F. L., & Hough, L. M. (2010). Validity in a jiffy: How synthetic validation contributes to personnel selection. *Industrial and Organizational Psychology: Perspectives on Science and Practice, 3*, 329-334.
- McGrath, R. E., Mitchell, M., Kim, B., & Hough, L. M. (2010). The validity of response bias indicators. *Psychological Bulletin, 136*, 450-470.
- Hough, L. M., & Oswald, F. L. (2008). Personality testing and industrial-organizational psychology: Reflections, progress and prospects (focal article). *Industrial and Organizational Psychology: Perspectives on Science and Practice, 1*, 272-290.
- Oswald, F. L., & Hough, L. M. (2008). Personality testing and industrial-organizational psychology: A productive exchange and some future directions (author response to commentaries). *Industrial and Organizational Psychology: Perspectives on Science and Practice, 1*, 343-332.
- Heggestad, E. D., & Hough, L. M. (2006). Impression management, faking, and socially desirable responding to self-report personality inventories. In S. Rogelberg (Ed.), *The Encyclopedia of Industrial and Organizational Psychology, Vol. 1* (pp. 335-338). Thousand Oaks, CA: Sage Publications.

- Hough, L. M. (2006). Shaping our destiny: SIOP presidential address. *The Industrial-Organizational Psychologist*, 44, 17-24.
- Ones, D. S., Viswesvaran, C., Hough, L. M., & Dilchert, S. (2005). Managers, leaders, and executives: Successful personality. In J. Deller, & D. S. Ones (Eds.), *International symposium on personality at work: Proceedings* (p. 8). Lüneburg, Germany: University of Applied Sciences.
- Hough, L. M., & Oswald, F. L. (2005). They're right, well...mostly right: Research evidence and an agenda to rescue personality testing from 1960s' insights. *Human Performance*, 18, 373-387.
- Hough, L. M. (2003). Emerging trends and needs in personality research and practice: Beyond main effects. In M. Barrick & A. Ryan (Eds.), *Personality and Work* (pp. 289-325). New York: Wiley & Sons, Inc.
- Hough, L. M., & Furnham, A. (2003). Importance and use of personality variables in work settings. In I. B. Weiner (Ed.-in-Chief) & W. Borman, D. Ilgen, & R. Klimoski (Vol. Eds.), *Handbook of Psychology: Vol. 12. Industrial and Organizational Psychology* (pp. 131-169). New York: Wiley.
- Wanberg, C. R., Hough, L. M., & Song, Z. (2002). Predictive validity of a multidisciplinary model of reemployment success. *Journal of Applied Psychology*, 87, 1100-1120.
- Hough, L. M., & Ones, D. S. (2001). The structure, measurement, validity, and use of personality variables in industrial, work, and organizational psychology. In N. R. Anderson, D. S. Ones, H. K. Sinangil, & C. Viswesvaran (Eds.), *Handbook of Industrial, Work and Organizational Psychology: Vol. 1* (pp. 233-277). London and New York: Sage.
- Reprinted in:
- Anderson, N. R., & Hülsheger, U. R. (Eds.). (2008). *Employee Selection and Performance Management: Vol. 2* (pp. 263-340). London: Sage Publications, Ltd.
- Hough, L. M., Oswald, F. L., & Ployhart, R. E. (2001). Determinants, detection, and amelioration of adverse impact in personnel selection procedures: Issues, evidence, and lessons learned. *International Journal of Selection and Assessment*, 9, 152-194.
- Reprinted in:
- Anderson, N. R., & Hülsheger, U. R. (Eds.). (2008). *Employee Selection and Performance Management: Vol. 3* (pp. 258-331). London: Sage Publications, Ltd.
- Hough, L. M. (2001). *I/O* owes its advances to personality. In B. W. Roberts & R. T. Hogan (Eds.), *Applied Personality Psychology: The Intersection of Personality and Industrial/Organizational Psychology* (pp. 19-44). Washington, DC: American Psychological Association.
- Reprinted in:
- Anderson, N. R., & Hülsheger, U. R. (Eds.). (2008). *Employee Selection and Performance Management: Vol. 2* (pp. 239-262). London: Sage Publications, Ltd.

- Hough, L. M., Barge, B. N., & Kamp, J. D. (2001). Assessment of personality, temperament, vocational interests, and work outcome preferences. In J. P. Campbell & D. Knapp (Eds.), *Exploring the Limits in Personnel Selection and Classification* (pp. 111-154). Hillsdale, NJ: Erlbaum Associates, Inc.
- Viswesvaran, C., Ones, D. S., & Hough, L. M. (2001). Do impression management scales in personality inventories predict managerial job performance ratings? *International Journal of Selection and Assessment*, *9*, 277-289.
- Hough, L. M., & Oswald, F. L. (2000). Personnel selection: Looking toward the future – Remembering the past. In S. Fiske (Ed.), *Annual Review of Psychology*, *Vol. 51*, (pp. 631-664). Palo Alto, CA: Annual Reviews.
- Ellingson, J. E., Sackett, P. R., & Hough, L. M. (1999). Social desirability and correcting for social desirability: Issues of applicant comparison and personality trait construct validity. *Journal of Applied Psychology*, *84*, 155-166.
- Hough, L. M. (1998). Effects of intentional distortion in personality measurement and evaluation of suggested palliatives. *Human Performance*, *11*, 209-244.
- Hough, L. M. (1998). Personality at work: Issues and evidence. In M. Hakel (Ed.), *Beyond Multiple Choice: Evaluating Alternatives to Traditional Testing for Selection* (pp. 131-166). Hillsdale, NJ: Erlbaum Associates, Inc.
- Hough, L. M. (1997). The millennium for personality psychology: New horizons or good old daze. *Applied Psychology: An International Review*, *47*, 233-261.
- Hough, L. M., & Schneider, R. J. (1996). Personality traits, taxonomies, and applications in organizations. In K. Murphy (Ed.), *Individual Differences and Behavior in Organizations* (pp. 31-88). San Francisco: Jossey-Bass.
- Schneider, R. J., Hough, L. M., & Dunnette, M. D. (1996). Broad-sided by broad traits: How to sink science in five dimensions or less. *Journal of Organizational Behavior*, *17*, 639-655.
- Reprinted in:  
Boyle, G. J., & Saklofske, D. H. (Eds.). (2004). *Psychology of Individual Differences: Vol. 2 – Personality* (pp.). London: Sage Publications, Ltd.
- Hough, L. M. (1996). Can integrity tests be trusted? *Employment Testing: Law & Policy Reporter*, *5*, 97-103,111.
- Wanberg, C. R., & Hough, L. M. (1996). Unemployment and outplacement: An organizational psychology perspective. In R. F. Broderick (Ed.), *National Academy of Sciences: Issues in Civilian Outplacement Strategies* (pp. 14-32). Washington, DC: National Academy Press.
- Schneider, R. J., & Hough, L. M. (1995). Personality and industrial/organizational psychology. In C. L. Cooper & I. T. Robertson (Eds.), *International review of industrial/organizational psychology* (Vol. 10, pp. 75-130). New York: Wiley & Sons.
- Triandis, H. C., Dunnette, M. D., & Hough, L. M. (Eds.). (1994). *Handbook of Industrial and Organizational Psychology* (Vol. 4). Palo Alto, CA: Consulting Psychologists Press.

- Hough, L. M., & Paullin, C. (1994). Construct-oriented scale construction: The rational approach. In G. S. Stokes, M. D. Mumford, & W. A. Owens (Eds.), *The Biodata Handbook: Theory, Research, and Application* (pp. 109-146). Palo Alto, CA: Consulting Psychologists Press.
- Dunnette, M. D., & Hough, L. M. (Eds.). (1992). *Handbook of Industrial and Organizational Psychology* (Vol. 3). Palo Alto, CA: Consulting Psychologists Press.
- Hough, L. M. (1992). The “Big Five” personality variables - construct confusion: Description versus prediction. *Human Performance*, 5 (1&2), 139-155.
- Hough, L. M. (1992). Review of the “Correctional Officers’ Interest Blank”. In D. J. Keyser & R. C. Sweetland (Eds.), *Test Critiques: Volume IX* (pp. 132-138). Austin TX: Pro-ed.
- Dunnette, M. D., & Hough, L. M. (Eds.). (1991). *Handbook of Industrial and Organizational Psychology* (Vol. 2). Palo Alto, CA: Consulting Psychologists Press.
- Hough, L. M. (1991). Review of the “Personnel Reaction Blank”. In D. J. Keyser & R. C. Sweetland (Eds.), *Test Critiques: Volume VIII* (pp. 563-569). Austin, TX: Pro-ed.
- Hough, L. M. (1991). Use of personality assessment for employment decisions in the 90s and beyond. *Proceedings of the 1991 National Assessment Conference*. Minneapolis, MN.
- Dunnette, M. D., & Hough, L. M. (Eds.). (1990). *Handbook of Industrial Organizational and Psychology* (Vol. 1). Palo Alto, CA: Consulting Psychologists Press.
- Hough, L. M. (1990). Review of the “Personnel Reaction Blank”. In J. Hogan & R. Hogan (Eds.), *Business and industry testing: Current practices and test reviews* (pp. 434-440). Austin, TX: Pro-ed.
- Hough, L. M., Eaton, N. K., Dunnette, M. D., Kamp, J. D., & McCloy, R. A. (1990). Criterion-related validities of personality constructs and the effect of response distortion on those validities [Monograph]. *Journal of Applied Psychology*, 75, 581-595.
- Reprinted in:
- Matthews, M. D., & Laurence, J. H. (Eds.). (2011). *Military Psychology*, vol. 3. London: Sage Publications, Ltd.
- McHenry, J. J., Hough, L. M., Toquam, J. L., Hanson, M. A., & Ashworth, S. (1990). Project A validity results: The relationship between predictor and criterion domains. *Personnel Psychology*, 43, 335-354.
- Peterson, N. G., Hough, L. M., Dunnette, M. D., Rosse, R. L., Houston, J. S., Toquam, J. L., & Wing, H. (1990). Project A: Specification of the predictor domain and development of new selection/classification tests. *Personnel Psychology*, 43, 247-276.
- Hanson, M. A., Hallam, G. L., & Hough, L. M. (1989). Detection of response distortion in the Adaptability Screening Profile (ASP). *Proceedings of the 31<sup>st</sup> Annual Conference of the Military Testing Association Conference*.
- Hough, L. M. (1989). Development of personality measures to supplement selection decisions. In B.J. Fallon, H.P. Pfister, & J. Brebner (Eds.), *Advances in Industrial Organizational Psychology* (pp. 365-375). North-Holland: Elsevier Science Publishers B.V.

- Pulakos, E. D., Borman, W. C., & Hough, L. M. (1988). Test validation for scientific understanding: Two demonstrations of an approach to studying predictor-criterion linkages. *Personnel Psychology, 41*, 703-716.
- Fisher, G. P., Hough, L. M., & Lilienthal, R. (1986). Using CODAP job analysis for training and selection: Retrospective considerations. *Proceedings of the 28<sup>th</sup> Annual Military Testing Association Conference*.
- Peterson, N. G., Hough, L. M., Ashworth, S. D., & Toquam, J. L. (1986). New predictors of soldier performance. *Proceedings of the 28<sup>th</sup> Annual Military Testing Association Conference*.
- Fisher, G. P., Lilienthal, R., & Hough, L. M. (1985). The training and selection of Army managers: Quantitative/qualitative approaches. *Proceedings of the 27<sup>th</sup> Annual Military Testing Association Conference, 2*, 900-905.
- Hough, L. M., McGue, M. K., Kamp, J. D., Houston, J. S., & Barge, B. N. (1985). Measuring personal attributes: Temperament, biodata, and interests. *Proceedings of the 27<sup>th</sup> Annual Military Testing Association Conference, 2*, 891-896.
- Wing, H., Barge, B. N., & Hough, L. M. (1985). Vocational interests as predictors of Army performance. *Proceedings of the 27<sup>th</sup> Annual Military Testing Association Conference, 2*, 582-586.
- Hough, L. M. (1984). Development and evaluation of the “Accomplishment Record” method of selecting and promoting professionals. *Journal of Applied Psychology, 69*, 135-146.
- Hough, L. M., Dunnette, M. D., & Keyes, M. A. (1983). The development and evaluation of three traditional and three alternative (non-traditional) selection procedures. *Proceedings of the International Personnel Managers Association (IMPA) Assessment Council Conference*.
- Hough, L. M., Dunnette, M. D., & Keyes, M. A. (1983). Evaluation of three “alternative” selection strategies. *Personnel Psychology, 36*, 261-276.
- Dunnette, M. D., Hough, L. M., & Rosse, R. L. (1979). Task and job taxonomies as a basis for identifying labor supply sources and evaluating employment qualifications. *Human Resource Planning Journal, 2*, (1), 37-52.
- Dunnette, M. D., Hough, L. M., Rosett, H., Mumford, E., & Fine, S. A. (1973). Work and nonwork: Merging human and societal needs. In M. D. Dunnette (Ed.), *Work and nonwork in the year 2001*. Monterey, CA: Wadsworth Publishing Company.
- Hough, L. M. (1973). Interviewers beware! [Review of Dean Peskin’s book, *Human Behavior and Employment Interviewing*]. *Contemporary Psychology, 18*, 488.

## **TALKS & COLLOQUIA**

- Hough, L. M. (2020, February). *Current research and professional activities: Hough update*. Presentation, Summit Group, Sanibel, FL.
- Hough, L. M. (2019, April). Seeking gender equality: Reflections, mentors, & I-O allies in action. In C. Demsky, J. Rineer, R. Crain, & A. Ellis (Chairs), *Advancing the Women of I-O*:

- Allies in Action*. Symposium conducted at the 34<sup>th</sup> Annual Convention for Industrial and Organizational Psychology, Baltimore.
- Hough, L. M. (2018, April). Work content: Effects on personality and leadership – Discussant comments. In A. B. Yost (Chair), *Work Context Effects on Personality & Leadership: Advancing Theory and Practice*. Symposium conducted at the 33<sup>rd</sup> Annual Convention for Industrial and Organizational Psychology, Chicago.
- Hough, L. M. (2018, April). Deniz Ones’ premises are correct but her conclusions are not. In J. J. Donovan & E. J. Kutcher (Chairs), *I-O Psychology and the Scientist-Practitioner Model: Have We Really Lost Our Way?* Panel discussion conducted at the 33<sup>rd</sup> Annual Convention for Industrial and Organizational Psychology, Chicago.
- Hough, L. M. (2018, April). Person-centered analytic approaches to study relationships between personality and work outcomes – Discussant comments. In R. S. Muhammad (Chair), *Innovations in Personality Research in I-O: Person-centered Analytic Approaches*. Symposium conducted at the 33<sup>rd</sup> Annual Convention for Industrial and Organizational Psychology, Chicago.
- Hough, L. M. (2017, May). *Personality validities in the .50s: What?! How? When?* Presentation at Personnel & Human Resources Research Group, Dublin City University: Dublin, Ireland.
- Hough, L. M. (2017, April). Challenging received wisdom: My journey. *Disruptors in the Field – Distinguished Professional Contributions Award Invited Address*. Special event conducted at the 32<sup>nd</sup> Annual Convention for Industrial and Organizational Psychology, Orlando.
- Hough, L. M. (2017, April). How to boost the validity of personality predictors: 50+ Year Saga. In C. DuBois (Chair), *Conceptual foundations of personality assessment in organizations: “Useful” to “Optimal”*. Symposium conducted at the 32<sup>nd</sup> Annual Convention for Industrial and Organizational Psychology, Orlando.
- Hough, L. M. (2016, April). Enhancing person-job fit. In H. Wolters (Chair), *Innovations in job assignment: Challenges and opportunities using noncognitive measures*. Panel conducted at the 31<sup>st</sup> Annual Convention of the Society for Industrial and Organizational Psychology, Anaheim.
- Hough, L. M. (2016, April). Person-centered leadership research – Discussant’s comments. In W. H. Macey (Chair), *Current perspectives on person-centered leadership research*. Symposium conducted at the 31<sup>st</sup> Annual Convention of the Society for Industrial and Organizational Psychology, Anaheim.
- Oswald, F., Shaw, A., & Hough, L. M. (2016, April). Considering vocational interests in personnel selection. In C. D. Nye (Chair), *Rethinking the study of vocational interests at work*. Symposium conducted at the 31<sup>st</sup> Annual Convention of the Society for Industrial and Organizational Psychology, Anaheim.
- Hough, L. M. (2015, October). *Improving Soldier-Army Outcomes through Better Fit/Classification Indices*. Paper presented to U.S. Army Research Institute for Behavioral and Social Sciences. Fort Belvoir, VA.

- Hough, L. M. (2014, May). Discussant. In R. Su (Chair), *Interests: New Frontier for Personnel Selection*. Symposium conducted at the 29<sup>th</sup> Annual Convention of the Society for Industrial and Organizational Psychology, Honolulu.
- Jones, D. P., & Hough, L. M. (2013, October). *Can They? And Will They? – How “Will Do” Drives Employee Engagement and Builds the Bottom Line*. Invited address, Minnesota Professionals for Psychology Applied to Work, Minneapolis.
- Hough, L. M. (2013, April). Panel member. In B. Chambers (Chair), *Scientist-Practitioner Divide: Try to eliminate or accept as inevitable*. Panel discussion conducted at the 28<sup>th</sup> Annual Convention of the Society for Industrial and Organizational Psychology, Houston.
- Hough, L. M. (2013, April). Discussant. In J. Hedge (Chair), *SIOP Honors and Awards: Navigating the requirements for career recognition*. Session conducted at the 28<sup>th</sup> Annual Convention of the Society for Industrial and Organizational Psychology, Houston.
- Ock, J., Oswald, F., & Hough, L. M. (2013, April). Theoretical and empirical structures of personality. In N. Christiansen (Chair), *Personality at Work: Expanding the nomological network*. Symposium conducted at the 28<sup>th</sup> Annual Convention of the Society for Industrial and Organizational Psychology, Houston.
- Hough, L. M. (2013, April). *SIOP awards presentation*. Plenary session conducted at the 28<sup>th</sup> Annual Convention of the Society for Industrial and Organizational Psychology, Houston.
- Hough, L. M. (2013, April). *SIOP Foundation awards presentation*. Foundation reception held at the 28<sup>th</sup> Annual Convention of the Society for Industrial and Organizational Psychology, Houston.
- Hough, L. M. (2012, April). *Racial differences in personnel selection: Complex findings and ongoing research*. Chair, Symposium conducted at the 27<sup>th</sup> Annual Convention of the Society for Industrial and Organizational Psychology, San Diego.
- Hough, L. M. (2012, April). *SIOP awards presentation*. Plenary session conducted at the 27<sup>th</sup> Annual Convention of the Society for Industrial and Organizational Psychology, San Diego.
- Hough, L. M. (2011, October). *Innovation & creativity: Climate is important...but don't forget selection*. Invited address, Minnesota Professionals for Psychology Applied to Work, Minneapolis.
- Hough, L. M. (2011, April). What do the results mean for practice? In T. S. Heffner & L. White (Chairs), *Advancing personality assessment for selection*. Symposium conducted at 26<sup>th</sup> Annual Convention of the Society for Industrial and Organizational Psychology, Chicago.
- Hough, L. M. (2011, April). My view after 35 years. In C. Scheu (Chair), *(Consulting) Women with a view*. Panel discussion conducted at the 26<sup>th</sup> Annual Convention of the Society for Industrial and Organizational Psychology, Chicago.
- Hough, L. M. (2011, April). *SIOP awards presentation*. Plenary session conducted at the 26<sup>th</sup> Annual Convention of the Society for Industrial and Organizational Psychology, Chicago.
- Hough, L. M. (2010, April). Others' reports of personality: Implications and cautions for practice. In B. S. Connelly & L. Chang (Chairs), *Stop being so self-centered! Researching and applying personality via observer reports*. Symposium conducted at 25<sup>th</sup> Annual Convention of the Society for Industrial and Organizational Psychology, Atlanta.

- Hough, L. M. (2010, April). The importance of sharing data. In S. E. Humphrey & K. Delaney-Klinger (Chairs), *Archiving data: Pitfalls and Possibilities*. Panel discussion conducted at the 25<sup>th</sup> Annual Convention of the Society for Industrial and Organizational Psychology, Atlanta.
- Hough, L. M. (2009, April). Career turning points – my story. In E. L. Hartman & J. Thompson (Chairs), *From surviving to thriving: Seven leaders share stories worth knowing*. Presentation and panel discussion conducted at the 24<sup>th</sup> Annual Convention of the Society for Industrial and Organizational Psychology, New Orleans.
- Hough, L. M. (2009, April). *Getting to know your SIOP Fellows*. In N. Bencaz, D. Diaz Granados, & R. D. Pritchard (Chairs), Panel discussion conducted at the 24<sup>th</sup> Annual Convention of the Society for Industrial and Organizational Psychology, New Orleans.
- Hough, L. M., & Dilchert, S. (2008, October). Inspiring creativity is important...but don't forget about selection. Invited presentation at the University of Toronto, Rotman School of Business and SIOP Conference *Inspiring Creative Thinking in Your Employees*. Toronto, Canada.
- Hough, L. M. (2007, November). *Staffing for innovation*. Invited presentation at Bowling Green State University, Bowling Green, OH.
- Hough, L. M. (2008, April). *Enabling innovation in organizations – 2007 Leading Edge Consortium*. Chair. Symposium conducted at 23<sup>rd</sup> Annual Convention of the Society for Industrial and Organizational Psychology, San Francisco.
- Hough, L. M. (2008, April). *Creative possibilities for federal funding of I-O scientists*. Chair. Executive Committee invited session at 23<sup>rd</sup> Annual Convention of the Society for Industrial and Organizational Psychology, San Francisco.
- Hough, L. M., & Dilchert, S. (2007, October). Inventors, innovators, and their leaders: Selecting for conscientiousness will keep you “inside the box.” Invited presentation at SIOP's *Enabling Innovation in Organizations: The Leading Edge*. Kansas City, MO.
- Hough, L. M. (2007, April). How can we be anything but scientist-practitioners? What's all the fuss about? In D. J. Beal & D. E. Rupp (Chairs), *Checking in with the Scientist-Practitioner Model: How are we doing?* Panel discussion conducted at the 22<sup>nd</sup> Annual Convention of the Society for Industrial and Organizational Psychology, NYC.
- Hough, L. M. (2007, April). Presenter and panelist. In A. J. Colella (Chair), *SIOP KARES (Katrina Aid and Relief Effort): Dealing with Disaster*. Panel discussion conducted at the 22<sup>nd</sup> Annual Convention for the Society for Industrial and Organizational Psychology, NYC.
- Hough, L. M. (2007, March). *Misconceptions & Milestones of Personality Testing for Personnel Selection*. Invited presentation at Minnesota State University, Mankato, MN.
- Hough, L. M. (2006, September). *Misconceptions & Milestones of Personality Testing for Personnel Selection*. Invited presentation at Houston Area Industrial and Organizational Psychologists, Houston, TX.
- Hough, L. M. (2006, June). *Myths, misconceptions, and milestones of personality testing for personnel selection*. Keynote speaker at the Chicago Industrial Organizational Psychologists Annual Meeting, Chicago.

- Hough, L. M. (2006, May). *Shaping our destiny: SIOP presidential address*. Presented at the 21<sup>st</sup> Annual Convention of the Society for Industrial and Organizational Psychology, Dallas.
- Hough, L. M. (2006, April). Expert witness experiences. Invited presentation in *Fairness and Bias in Personnel Selection*, University of Minnesota, Minneapolis, MN.
- Ones, D. S., Viswesvaran, C., Hough, L. M., & Dilchert, S. (2005). *Managers, leaders, and executives: Successful personality*. Paper presented at the International Symposium on Personality at Work, Lüneburg, Germany.
- Hough, L. M., & Ones, D. S. (2005, April). *Power of personality: Longitudinal studies and meta-analyses*. Chairs. Symposium presented at the 20<sup>th</sup> Annual Convention of the Society for Industrial and Organizational Psychology, Los Angeles.
- Hough, L. M. (2005, April). *Gaining visibility for your work: Learn from the experts*. Facilitator. Panel discussion conducted at the 20<sup>th</sup> Annual Convention of the Society for Industrial and Organizational Psychology, Los Angeles.
- Hough, L. M. (2005, April). *Gaining credibility for your work*. Panelist. Panel discussion at the Doctoral Consortium at the 20<sup>th</sup> Annual Convention of the Society for Industrial and Organizational Psychology, Los Angeles.
- Hough, L. M., & Johnson, J. W. (2003, April). *The Science and Art of Selection and Assessment*. Workshop presented at the 18<sup>th</sup> Annual Convention of the Society for Industrial and Organizational Psychology, Orlando.
- Hough, L. M. (2003, April). Emerging thoughts on emerging views of validity. Presenter and panelist. In W. H. Macey (Chair), *Emerging Views of Validity*. Panel discussion conducted at the 18<sup>th</sup> Annual Convention of the Society for Industrial and Organizational Psychology, Orlando.
- Curnow, C. K., Hough, L. M., & Baranowski, L. (2003, April). Applications and modifications of the Accomplishment Record development process. In D. L. Whetzel (Chair), *New Twists on Several Measurement Methods*. Symposium presented at the 18<sup>th</sup> Annual Convention of the Society for Industrial and Organizational Psychology, Orlando.
- Jackson, H. L., Ones, D. S., Sinangil, H. K., & Hough, L. M. (2003, May). Impression management as a predictor of expatriate job performance. Paper presented at the 11<sup>th</sup> European Congress on Work and Organizational Psychology, Lisbon, Portugal.
- Hough, L. M. (2002, April). Emerging trends and needs in personality research and practice. In M. R. Barrick (Chair). *Personality and Work*. Symposium conducted at the 17<sup>th</sup> Annual Convention of the Society for Industrial and Organizational Psychology, Toronto.
- Hough, L. M. (2002, April). Chair. *Compound Traits: The Next Frontier of I/O Personality Research*. Symposium conducted at the 17<sup>th</sup> Annual Convention of the Society for Industrial and Organizational Psychology, Toronto.
- Hough, L. M. (2002, April). Panelist. In M. Campion (Chair), *What I/O Psychologists Need to Know About the Skill Standards Movement*. Panel discussion conducted at the 17<sup>th</sup> Annual Convention of the Society for Industrial and Organizational Psychology, Toronto.
- Hough, L. M. (2002, February). *Personality predictors of managerial performance*. Paper presented at the Summit Group meeting, Charleston, SC.

- Wanberg, C. R., Hough, L. M., & Song, Z. (2001, June). *Predictive validity of a multidisciplinary model of reemployment success*. Paper presented at America's Workforce Network Research Conference, Washington, DC.
- Hough, L. M. (2001, April). My career experiences. In L. L. Koppes (Chair), *Preeminent Women I-O Psychologists: Historical and Contemporary Perspectives*. Panel discussion conducted at the 16<sup>th</sup> Annual Conference of the Society for Industrial and Organizational Psychology, San Diego.
- Hough, L. M. (2001, April). My views on being an expert witness. In M. L. Connerley (Chair), *Everything You Want to Know About Being an Expert Witness*. Panel discussion conducted at the 16<sup>th</sup> Annual Conference of the Society for Industrial and Organizational Psychology, San Diego.
- Hough, L. M. (2001, April). Impact of social desirability on validity: The facts. In C. E. Miller (Chair), *What Conclusions can be drawn from Social Desirability Measure Research?* Panel discussion conducted at the 16<sup>th</sup> Annual Conference for the Society for Industrial and Organizational Psychology, San Diego.
- Wanberg, C., Hough, L. M., & Song, Z. (2001, April). New directions for the selection and referral of job-seekers to reemployment services. In M. Fugate (Chair), *Job Loss and Reemployment Research: Critical New Directions*. Symposium conducted at the 16<sup>th</sup> Annual Conference of the Society for Industrial and Organizational Psychology, San Diego.
- Hough, L. M. (2001, March). *Personality changes I/O psychology*. Invited address at 54<sup>th</sup> Annual Conference of the California Psychological Association, Los Angeles.
- Hough, L. M., & Ones, D. S. (2000, August). *Personality and performance in leadership positions: Presidents, CEO's and managers* (Chairs). Symposium presented at the 108<sup>th</sup> Annual Convention of the American Psychological Association, Washington, DC.
- Ones, D. S., Hough, L. M., & Viswesvaran, C. (2000, August). Personality of managers: Mean differences and predictors of performance. In L. M. Hough & D. S. Ones (Chairs), *Personality and performance in leadership positions: Presidents, CEO's and managers*. Symposium presented at the 108<sup>th</sup> Annual Convention of the American Psychological Association, Washington, DC.
- Viswesvaran, C., Ones, D. S., Hough, L. M. (2000, August). Personality constructs predictive of leadership performance for managers and executives. In L. M. Hough & D. S. Ones (Chairs), *Personality and performance in leadership positions: Presidents, CEO's and managers*. Symposium presented at the 108<sup>th</sup> Annual Convention of the American Psychological Association, Washington, DC.
- Hough, L. M. (2000, March). *Personnel selection – 1995-2000: Trends, key findings, and implications*. Invited address at Minnesota Professional Psychologists at Work, Minneapolis, MN.
- Hough, L. M. (2000, February). *Personality's contributions to I.O. Psychology*. Invited address at Summit Group, Fort Myers, FL.
- Hough, L. M. (1999, May). *I/O owes its advances to personality*. Invited address at Applied Personality Psychology Conference University of Tulsa, Tulsa, OK.

- Hough, L. M. (1999, May). *Integrating HR systems conceptually and technologically with business objectives*. In L. M. Hough (Chair), Practitioner forum conducted at the 14<sup>th</sup> Annual Conference of the Society for Industrial and Organizational Psychology, Atlanta.
- Hough, L. M. (1998, October). New Horizons for Personality Testing. Keynote address at Personnel Testing Council of Southern California conference *Unearthing Hidden Potential: Exploring Non-traditional Means of Assessment*, Los Angeles.
- Hough, L. M. (1998, July). *Solving real-world problems: Creating competitive advantage through HRM Systems*. Workshop conducted at the 6<sup>th</sup> Conference of the International Society for the Study of Work and Organizational Values, Istanbul, Turkey.
- Hough, L.M. (1998, June). *Directions in personality testing*. Invited address at Annual Conference of the IPMA Assessment Council on Public Personnel Assessment, Chicago.
- Hough, L.M., Ones, D. S., & Viswesvaran, C. (1998, April). Personality correlates of managerial performance constructs. In R. Page (Chair), *Personality Determinants of Managerial Potential, Performance, Progression, and Ascendancy*. Symposium conducted at the 13<sup>th</sup> Annual Convention of the Society for Industrial and Organizational Psychology, Dallas.
- Ones, D. S., Hough, L.M., & Viswesvaran, C. (1998, April). Validity and adverse impact of personality-based managerial potential scales. In R. Page (Chair), *Personality Determinants of Managerial Potential, Performance, Progression, and Ascendancy*. Symposium conducted at the 13<sup>th</sup> Annual Convention of the Society for Industrial and Organizational Psychology, Dallas.
- Viswesvaran, C., Ones, D. S., & Hough, L.M. (1998, April). Construct validity of managerial potential scales. In R. Page (Chair), *Personality Determinants of Managerial Potential, Performance, Progression, and Ascendancy*. Symposium conducted at the 13<sup>th</sup> Annual Convention of the Society for Industrial and Organizational Psychology, Dallas.
- Hough, L. M. (1998, April). *Job performance models and personality taxonomies*. In J. C. Hogan (Chair). Symposium conducted at the 13<sup>th</sup> Annual Convention of the Society for Industrial and Organizational Psychology, Dallas.
- Hough, L M. (1998, April). *A Mock Ethics Tribunal: Cases from SIOP's Revised Ethics Casebook*. Panel Discussion at 13<sup>th</sup> Annual Conference of the Society for Industrial and Organizational Psychology, Dallas.
- Ellingson, J. E., Sackett, P. R., & Hough, L. M. (1998, April). *Correcting Response Distortion: Issues of Fairness and Trait Construct Validity*. Paper presented at the 13<sup>th</sup> Annual Convention of the Society for Industrial and Organizational Psychology, Dallas.
- Hough, L. M. (1997, August). Personality variables and prediction of job performance: The nature of the taxonomies makes a difference. In J. Collins (Chair), *Which Trait Theory Should Psychologists Adopt and Why?* Symposium at the 105<sup>th</sup> Annual Convention of the American Psychological Association, Chicago.
- Hough, L. M. (1997, August). Overview of APA task force on Test User Qualifications. In L. M. Hough (chair), *Are You Qualified to Use Tests?* Symposium conducted at the 105<sup>th</sup> Annual Convention of the American Psychological Association, Chicago.

- Hough, L. M. (1997, July). *What's New in Personality Testing in the World of Work*. Invited address at the National Research Council/National Academy of Sciences. Woods Hole, MA.
- Hough, L. M., & Sackett, P. (1997, April). Personality and integrity testing for personnel selection: Issues and controversies. Workshop presented at 12th Annual Conference of the Society for Industrial and Organizational Psychology, St. Louis.
- Hough, L. M. (1997, April). Nassau County personality measures: Issues & evidence. In J. R. Hollenbeck (Chair), *Police Selection in Nassau County: Validity and Demographic Diversity*. Invited address and panel discussion at the 12th Annual Convention of the Society for Industrial and Organizational Psychology, St. Louis.
- Hough, L. M. (1997, April). Issues and evidence: Use of personality variables for predicting job performance. In F. L. Schmidt & D. S. Ones (Chairs), *Improving Prediction with Personality Constructs: Concerns and Non-Concerns*. Symposium conducted at the 12th Annual Convention of the Society for Industrial and Organizational Psychology, St. Louis.
- Hough, L. M. (1997, April). Faking: What is the evidence? What does it mean? (Discussant). In G. J. Lautenschlager (Chair), *Faking on Non-Cognitive Measures: The Extent, Impact, and Identification of Dissimulation*. Symposium conducted at the 12th Annual Convention of the Society for Industrial and Organizational Psychology, St. Louis.
- Hough, L. M. (1997, January). *Personality: New Horizons or Good Old Daze*. Invited address at Industrial Relations Center, University of Minnesota, Minneapolis.
- Hough, L. M. (1996, October). *Personality - Who Needs It?* Invited address at Industrial/Organizational Seminar, Psychology Department of the University of Minnesota, Minneapolis.
- Hough, L. M. (1996, June). *Personnel Assessment: Issues and Trends - Our Future*. Keynote Address at Annual Conference of the IPMA Assessment Council on Public Personnel Assessment, Boston.
- Hough, L. M., & Sackett, P. (1996, April). *Personality and Integrity Testing for Personnel Selection: Issues and Controversies*. Workshop presented at 11<sup>th</sup> Annual Conference of the Society for Industrial and Organizational Psychology, San Diego.
- Hough, L. M. (1996, April). Personality measurement and personnel selection: Implementation issues. In J. Hogan (Chair), *Personality Measurement and Employment Decisions: Questions and Answers*. Practitioner forum conducted at the 11<sup>th</sup> Annual Conference of the Society for Industrial and Organizational Psychology, San Diego.
- Hough, L. M. (1996, February). *Displacement and Outplacement: What Makes a Difference?* Invited address at National Academy of Sciences & Department of Defense, Washington, DC.
- Hough, L. M. (1995, May). Applicant self-descriptions: Evaluating strategies for reducing distortion. In F. L. Schmidt (Chair), *Response Distortion and Social Desirability in Personality Testing for Personnel Selection*. Symposium conducted at the 10<sup>th</sup> Annual Convention of the Society for Industrial and Organizational Psychology, Orlando.

- Hough, L. M. (1995, May). Competency modeling: HR systems that reinforce organizational transformations. In L. M. Hough (chair), *Strategic Competency Modeling: Rethinking and Reengineering Job Analysis*. Practitioner's Forum conducted at the 10<sup>th</sup> Annual Convention of the Society for Industrial and Organizational Psychology, Orlando.
- Hough, L. M. (1995, January). *The Future of I.O. Psychology: A Changing Practice*. Invited address at Metro New York Association for Applied Psychology, NYC.
- Hough, L. M. (1994, October). Personality at work: Issues and evidence. Invited address Bowling Green State University Conference *Evaluating Alternatives to Traditional Testing for Selection*, Toledo.
- Hough, L. M. (1994, September). *Importance and Growing Role of Personality Assessment in Selection*. Invited address at National Staffing Forum annual conference, Chicago.
- Hough, L. M., & Tippins, N. T. (1994, April). New designs for selection and placement systems: The Universal Test Battery. In N. W. Schmitt (Chair), *Cutting Edge Developments in Selection*. Symposium presented at the 9<sup>th</sup> Annual Convention of the Society for Industrial and Organizational Psychology, Nashville.
- Hough, L. M. (1994, April). Recommended revisions to the Standards: A consulting psychologist's point of view. In W. J. Camara (Chair). *Revising the Testing Standards: Invited Comments from I/O Psychology*. Symposium presented at the 9th Annual Meeting of the Society for Industrial and Organizational Psychology, Nashville.
- Dunnette, M. D., & Hough, L. M. (1993, November). Personality Factors in Work Performance. In *Does Applied Science Pay?* Symposium in honor of Professor Henk Thierry, University of Amsterdam, Amsterdam.
- Hough, L. M. (1993, November). *Validity of Personality Constructs for Predicting Work Performance: The 'Big Five' are Too Fat*. Colloquium presented at University of East London, London, England.
- Hough, L. M. (1993, November). *Validity of Personality Constructs for Predicting Work Performance: The 'Big Five' are Too Fat*. Colloquium presented at Centre for Interdisciplinary Business Research at Katholieke Universiteit Leuven, Leuven, Belgium.
- Hough, L. M. (1993, June). *Putting Some Personality in Assessment*. Keynote address at IPMA Assessment Council Conference on Public Personnel Assessment, Sacramento, CA.
- Hough, L. M. (1993, May). Summary of validity studies that used MMPI and CPI scales to predict police officer performance. In W. F. Cascio (Chair), *Soroka v. Dayton Hudson and Implications for Personality Assessment in Employment*. Symposium presented at the 8th Annual Meeting of the Society for Industrial and Organizational Psychology, San Francisco.
- Dunnette, M. D., & Hough, L. M. (1993, May). The many faces of job performance. In R. M. Guion (Chair), *Personality at Work*. Symposium presented at the 8th Annual Meeting of the Society for Industrial and Organizational Psychology, San Francisco.
- Hough, L. M., & Dunnette, M. D. (1992). U.S. Managers abroad: What it takes to succeed. In R. Guzzo (Chair), *Expatriate Assignments: Identifying Candidates, Managing Retention, and Strategic Roles*. Symposium conducted at the 52<sup>nd</sup> Annual Meeting of the Academy of Management, Las Vegas.

- Hough, L. M. (1992, May). *Symposium: Incremental Validity of Personality Over Ability in Predicting Job Performance*, Chair. Symposium conducted at the 7<sup>th</sup> Annual Meeting of the Society for Industrial and Organizational Psychology, Montreal.
- Paullin, C. J., Hough, L. M., Dohm, T. E. (1992, May). *Development of a Content-valid Structured Interview for Selecting Entry-level Firefighters*. Poster session presented at the 7<sup>th</sup> Annual Meeting of the Society for Industrial and Organizational Psychology, Montreal.
- Hough, L. M. (1992, January). *Nine Faces of Personality Assessment*. Invited address presented at Metropolitan New York Association for Applied Psychology, New York City, NY.
- Hough, L. M. (1991, October). Use of personality assessment for employment decisions in the 90s and beyond. Presented at the PDI/Univ. of MN National Assessment Conference: *A Changing View - Moving Toward the 21st Century*. Minneapolis, MN.
- Hough, L. M. (1991, August). *Use of Personality Assessment for Employee Selection*. Workshop presented at 99th Annual Convention of the American Psychological Association, San Francisco.
- McKenna, D. D., Hough, L. M. (1991, August). Impact of personality in intragroup working relationships. In W. W. Tornow (Chair), *New Perspectives on Personality and Job Performance*. Symposium conducted at the 99th Annual American Psychological Association Convention, San Francisco, CA.
- Hough, L. M. (1991, July). Attributes of an effective work force. Presented at Cornell University conference *Better Schools, Better Jobs: Making School Pay Off in the Workplace*, Ithaca, NY.
- Hough, L. M. (1991, April). Validity of personality constructs for predicting job performance constructs. In K. J. Nilan (Chair), *Personality Measurement: Back to the Future*. Symposium conducted at the 6th Annual Conference of the Society for Industrial and Organizational Psychology, St. Louis, MO.
- Hough, L. M. (1990, October). The 'Big Five' personality factors: Construct confusion. Presented at Personnel Testing Council of Southern California Conference *Construct Validity: Issues and Opportunities*, Newport Beach, CA.
- Hough, L. M. (1990, January). *Personality Variables: From Scrap Heap to Winner's Circle*. Colloquium presented at University of Tulsa. Tulsa, OK.
- Hanson, M. A., Hallam, G. L., & Hough, L. M. (1989, November). Detection of response distortion in the Adaptability Screening Profile (ASP). In S. Selman (Chair), *Implementation of Biodata into Military Enlistment Screening*. Symposium conducted at the 31<sup>st</sup> Annual Convention for the Military Testing Association, San Antonio.
- Hough, L. M. (1989, April). Biodata and the measurement of individual differences. In T. Mitchell (Chair), *Biodata vs Personality: The Same or Different Classes of Individual Differences*. Symposium conducted at the 4th Annual Conference of the Society for Industrial and Organizational Psychology, Boston.
- Hough, L. M. (1988, October). *Personality—Does It Matter?* Invited address at Personnel Decisions, Inc. Professional Development Workshop, Minneapolis.

- Hough, L. M. (1988, September). *Development of Personality Measures to Supplement Selection Decisions*. Paper presented at the 24th Annual International Congress of Psychology Convention, Sydney, Australia.
- Hough, L. M. (1988, April). *Personality Assessment for Selection and Placement Decisions*. Workshop presented at 3rd Annual Conference of the Society for Industrial and Organizational Psychology, Dallas.
- Hough, L. M. (1988, March). *Behavioral Science, Employment Testing, and the Law*. Paper presented to the University of Minnesota Law School, Minneapolis.
- Hough, L. M. (1987, October). *Project A: Research Objectives and Results*. Paper presented at University of Minnesota Industrial Relations Center Staffing Seminar, Minneapolis.
- Hough, L. M. (1987, August). Overcoming objections to use of temperament variables in selection: Demonstrating their usefulness. In R. C. Page (Chair), *New Perspectives on Personality and Job Performance*. Symposium conducted at 95<sup>th</sup> Annual American Psychological Association Convention, New York City.
- Pulakos, E. D., Borman, W. C., & Hough, L. M. (1987, August). *Test Validation for Scientific Understanding: Studying Predictor-criterion Linkages*. Paper presented at the 95<sup>th</sup> Annual American Psychological Convention, New York City.
- Hough, L. M. (1987, April). Developing better science and better practice. In E. D. Pulakos (Chair), *What Lies at the Intersection of I/O Science and Practice?* Symposium conducted at the 2<sup>nd</sup> Annual Conference of the Society for Industrial and Organizational Psychology, Atlanta.
- Hough, L. M., & Ashworth, S. D. (1987, April). Assessment of temperament constructs as predictors of job performance: Predicting soldier performance. In R. T. Hogan (Chair), *Personality Measurement and I/O Psychology*. Symposium conducted at the 2nd Annual Conference of the Society for Industrial and Organizational Psychology, Atlanta.
- McHenry, J. J., Hough, L. M., Toquam, J. L., Hanson, M. A., & Ashworth, S. D. (1987, April). Project A validity results: The relationship between predictor and criterion domains. In J. P. Campbell (Chair), *Project A: When Science and Practice are Forced to Meet*. Symposium conducted at the 2nd Annual Conference of the Society for Industrial and Organizational Psychology, Atlanta.
- Peterson, N. G., Hough, L. M., Dunnette, M. D., Rosse, R. L., Houston, J. S., Toquam, J. L., & Wing, H. (1987, April). Identification of predictor constructs and development of new selection/classification tests. In J. P. Campbell (Chair), *Project A: When Science and Practice are Forced to Meet*. Symposium conducted at the 2nd Annual Conference of the Society for Industrial and Organizational Psychology, Atlanta.
- Wing, H., Hough, L. M., & Peterson, N. G. (1987, April). *Predictive Validity of Non-cognitive Measures for Army Classification and Attrition*. Paper presented at the 2nd Annual Conference of the Society for Industrial and Organizational Psychology, Atlanta.
- Hough, L. M. (1987, March). *Research on the Relationship of Personality Measures to Job Performance*. Paper presented at the California Psychological Inventory Conference, Minneapolis.

- Hough, L. M. (1987, February). *Employment Testing and the Law*. Paper presented to the University of Minnesota Law School, Minneapolis.
- Fisher, G. P., Hough, L. M., & Lilienthal, R. (1986, November). Using CODAP job analysis for training and selection: Retrospective considerations. In R. Lanterman (Chair), *CODAP*. Symposium conducted at the 28th Annual Military Testing Association Conference, Mystic, CT.
- Peterson, N. G., Hough, L. M., Ashworth, S. D., & Toquam, J. L. (1986, November). New predictors of soldier performance. In M. G. Rumsey (Chair), *Project A: Concurrent Validation*. Symposium conducted at the 28<sup>th</sup> Annual Military Testing Association Conference, Mystic, CT.
- Hough, L. M., Gast, I. F., White, L. A., & McCloy, R. A. (1986, August). The relation of leadership and individual differences to job performance. In M. G. Rumsey (Chair), *Individual Differences, Work Environment, and Performance in Military Jobs*. Symposium conducted at the 94th Annual American Psychological Association Convention, Washington, DC.
- White, L. A., Borman, W. C., Hough, L. M., & Hoffman, R. G. (1986, August). A path analytic model of job performance ratings. In H. R. Hirsh (Chair), *Causal Models of Job Performance*. Symposium conducted at the 94th Annual American Psychological Association Convention, Washington, DC.
- Fisher, G. P., Lilienthal, R., & Hough, L. M. (1986, April). *Using CODAP Job Analysis for the Development of Integrated Training Requirements for Three Army Civilian Career Fields*. Paper presented at the American Educational Research Association Annual Meeting, San Francisco.
- Hough, L. M. (1985, November). *Selection Guidelines, Testing & EEOC: An Update*. Paper presented at Center for Human Resources Programs, Institute of Industrial Relations, University of California-Berkeley.
- Fisher, G. P., Lilienthal, R., & Hough, L. M. (1985, October). Selecting and training logistics managers: Quantitative/qualitative approaches. In G. P. Fisher (Chair), *The Training and Selection of Army Managers: Quantitative/qualitative Approaches*. Symposium conducted at the 27th Annual Convention for the Military Testing Association, San Diego.
- Hough, L. M., McGue, M. K., Kamp, J. D., Houston, J. S., & Barge, B. N. (1985, October). Measuring personal attributes: Temperament, biodata, and interests. In H. Wing (Chair), *Predicting a Broad Variety of Criteria: Elaborating the Predictor Space*. Symposium conducted at the 27<sup>th</sup> Annual Convention for the Military Testing Association, San Diego.
- Wing, H., Barge, B. N., & Hough, L. M. (1985, October). Vocational interests as predictors of Army performance. In J. J. Pass (Chair), *Elements of a Military Occupational Exploration System*. Symposium conducted at the 27<sup>th</sup> Annual Convention for the Military Testing Association, San Diego.

- Hough, L. M., Barge, B. N., Houston, J. S., McGue, M. K., & Kamp, J. D. (1985, August). Problems, issues, and results in the development of temperament, biographical, and interest measures. In H. Wing (Chair), *Expanding the Measurement of Predictor Space for Military Enlisted Jobs*. Symposium conducted at the 93rd Annual American Psychological Association Convention, Los Angeles.
- Hough, L. M., Dunnette, M. D., Wing, H., Houston, J. S., & Peterson, N. G. (1984, August). *Covariance Analyses of Cognitive and Non-cognitive Measures in Army Recruits: An Initial Sample of Preliminary Battery Data*. Paper presented at the 92nd Annual American Psychological Association Convention, Toronto, Canada.
- Hough, L. M. (1981, November). *The "Accomplishment Record" Method as an Alternative Selection Procedure*. Paper presented at Minnesota Proseminar, Minneapolis.
- Hough, L. M. (1981, November). *Selecting High-level Professionals: The State-of-the-art*. Paper presented at University of Arkansas, Fayetteville.
- Hough, L. M., Dunnette, M. D., & Keyes, M. A. (1981, May). *Development and Evaluation of Three Traditional and Three "Alternative" Selection Procedures*. Paper presented at International Personnel Management Association (IPMA), Washington, DC.
- Dunnette, M. D., & Hough, L. M. (1979, January). *New Strategies in Performance Appraisal and Selection Research*. Workshop for faculty and students, University of Puerto Rico, Psychology Department, San Juan, Puerto Rico.

## **TECHNICAL REPORTS**

- Hough, L. M (2021, April). *Expert Report of Leaetta M. Hough, Ph.D. In the Matter of Chen-Oster, et al. Individually and on Behalf of All Others Similarly Situated, Plaintiffs, vs. Goldman, Sachs & Co., Defendant*. (Case No. 10-CV-106950). (DG #56.2d). Confidential. [Gender pay equity case; job-relatedness/validation]
- Hough, L. M (2021, March). *Expert Report of Leaetta M. Hough, Ph.D. In the Matter of Chen-Oster, et al. Individually and on Behalf of All Others Similarly Situated, Plaintiffs, vs. Goldman, Sachs & Co., Defendant*. (Case No. 10-CV-106950). (DG #56.1). Confidential. [Gender pay equity case; job analysis]
- Hough, L. M. (2021, February). *Expert Sur-Sur-Rebuttal Report of Leaetta M. Hough, Ph.D. In the Matter of Ellis et al. Individually and All Others Similarly Situated, Plaintiffs v. Google, LLC, Defendant* (Case No. OGC-17-561299). (DG #54.3). Confidential. [Gender pay equity case].
- Hough, L. M. (2020, November). *Auditing HR Systems*. St. Paul, MN. The Dunnette Group, Ltd. (DG #55). Confidential.
- Hough, L. M. (2020, November). *Expert Rebuttal Report of Leaetta M. Hough, Ph.D. In the Matter of Ellis et al. Individually and All Others Similarly Situated, Plaintiffs v. Google, LLC, Defendant* (Case No. OGC-17-561299). (DG #54.2). Confidential. [Gender pay equity case].

- Hough, L. M. (2020, May). *Expert Report of Leaetta M. Hough, Ph.D. In the Matter of Ellis et al. Individually and All Others Similarly Situated, Plaintiffs v. Google, LLC, Defendant* (Case No. OGC-17-561299). (DG #54.1). Confidential. [Gender pay equity case]
- Hough, L. M. (2019, January). *Expert Report of Leaetta M. Hough, Ph.D. In the Matter of Jewett, Wang, and Murray, on behalf of themselves, and Petersen, Clark, and Kant, on behalf of themselves and a proposed class v. Oracle America, Inc.* (Case No. 17CIV02669). (DG #53.1). Confidential. [Gender pay equity case]
- Hough, L. M. Boalt School of Law: Definition and Prediction of Effective Lawyering [includes Accomplishment & Experience Record]
- Hough, L. M. (2018, March). *Expert Report of Leaetta M. Hough, Ph.D. In the Matter of Thomas King v. General Mills, Inc.* (Case No. 01-17-0053-0033). (DG #51.7). Confidential. [Age discrimination arbitration case]
- Hough, L. M. (2018, March). *Expert Report of Leaetta M. Hough, Ph.D. In the Matter of Peggy Maxe v. General Mills, Inc.* (Case No. 01-17-0005-2225). (DG #51.6). Confidential. [Age discrimination arbitration case]
- Hough, L. M. (2018, March). *Expert Report of Leaetta M. Hough, Ph.D. In the Matter of Denise Holtz v. General Mills, Inc.* (Case No. 01-17-0003-0928). (DG #51.5). Confidential. [Age discrimination arbitration case]
- Hough, L. M. (2017, October). *Expert Report of Leaetta M. Hough, Ph.D. In the Matter of Michael Murray v. General Mills, Inc.* (Case No. 01-17-0003-2025). (DG #51.4). Confidential. [Age discrimination arbitration case]
- Hough, L. M. (2017, October). *Expert Report of Leaetta M. Hough, Ph.D. In the Matter of David Kirk v. General Mills, Inc.* (Case No. 01-17-0002-4460). (DG #51.3). Confidential. [Age discrimination arbitration case]
- Hough, L. M. (2017, October). *Expert Rebuttal Report of Leaetta M. Hough, Ph.D. In the Matter of Michael Allard v. General Mills, Inc.* (Case No. 01-17-0003-0905). (DG #51.2.2). Confidential. [Age discrimination arbitration case]
- Hough, L. M. (2017, October). *Expert Report of Leaetta M. Hough, Ph.D. In the Matter of Michael Allard v. General Mills, Inc.* (Case No. 01-17-0003-0905). (DG #51.2.1). Confidential. [Age discrimination arbitration case]
- Hough, L. M. (2017, October). *Rebuttal Expert Report of Leaetta M. Hough, Ph.D. in the Matter of Nancy Lykkehoy v. General Mills, Inc.* (Case No. 01-17-0001-8445). (DG #51.1). Confidential. [Age discrimination arbitration case]
- Hough, L. M. (2017). *Review of Revised IOSolutions' Transportability Report for Lubbock TX Police.* Prepared in the Matter of United States of America v. City of Lubbock, TX. (Case No. 5:15-ev-234). (DG #48.3) [Police]
- Hough, L. M. (2016). *Expert Report of Leaetta M. Hough, Ph.D. Prepared in the Matter of Cara Williams, et al. individually and on behalf of a putative class of similarly situated individuals (Plaintiffs) v. Wells Fargo Bank, N. A. (Defendant)* Case No. 4:15-cv-000038 – S.D. Iowa. (2016, July 28). (DG #49). Confidential. [Background investigation; FDI Act, Section 19 waivers]

- Jones, D. P., & Hough, L. M. (2016). *Supplemental Expert Report Regarding City of Jacksonville Job Analysis Results Produced by JFRD for JFRD Captain (Suppression) and District Chief (Suppression Positions of October 7, 2016 by David P. Jones, Ph.D. and Leaetta M. Hough, Ph.D. Prepared in the Matter of United States of America v. Consolidated City of Jacksonville, Jacksonville Association of Firefighters, Local 122, IAAF (Case No. 3:12-cv00451-J-32MCR)*. June 17, 2016. (DG #48.3) [Engineers, Lieutenants, Captains, District Chiefs – firefighters]
- Jones, D. P., & Hough, L. M. (2015). *Response to Barrett and Swander Rebuttals Regarding the Leaetta M. Hough, Ph.D. and David P. Jones, Ph.D. Expert Report of December 15, 2015 by David P. Jones, Ph.D. and Leaetta M. Hough, Ph.D. Prepared in the Matter of United States of America v. Consolidated City of Jacksonville, Jacksonville Association of Firefighters, Local 122, IAAF (Case No. 3:12-cv00451-J-32MCR)*. June 17, 2016. (DG #48.2) [Engineers, Lieutenants, Captains, District Chiefs – firefighters]
- Jones, D. P., & Hough, L. M. (2015). *Expert Report of David P. Jones, Ph.D. & Leaetta M. Hough, Ph.D., Prepared in the Matter of United States of America v. Consolidated City of Jacksonville, Jacksonville Association of Firefighters, Local 122, IAAF (Case No. 3:12-cv00451-J-32MCR)*. Dec. 15, 2015. (DG # 48.1) [Engineers, Lieutenants, Captains, District Chiefs – firefighters]
- Paullin, C., Hough, L. M., & Caragno, J. (2016). *Administrative Law Judge Work Analysis Study Revised Final Report*. Alexandria, VA: HumRRO. (DG 46.2)
- Paullin, C., Hough, L. M., & Caragno, J. (2015). *Administrative Law Judge Work Analysis Study*. HumRRO #2015-052). (DG #46.1.1) Alexandria, VA: HumRRO.
- AALJ/HumRRO & DG – Source Materials [Policy Directives] for ALJ Validation Time Study to accompany Final Report dated 2015 and Revised Final Report dated 2016. (DG # 46.1.2) Alexandria, VA: HumRRO.
- Hough, L. M. (2014). *Expert Report of Leaetta Hough & Rebuttal of Michael A. Campion's Expert Report (DG #45)*. Prepared in the Matter of Bruce Smith, et al., v. City of Boston.
- Hough, L. M. (2014). *Bureau of Police Entry-Level Hiring Practices: Review and Recommendations (DG #44)*. City of Pittsburgh, PA. [Confidential]
- Hough, L. M., Shultz, M., & Ock, J. (2012). *Special Project for Golden Gate Law School: Final Report (DG #43)*. San Francisco, CA: Golden Gate Law School.
- Hough, L. M. (2010). *Validity Studies: Global Mindset Inventory (2010 Edition, Shortened Scales), Walmart and Rich Corporation Data (DG #36.2)*. Glendale, AZ: Thunderbird School of Global Management.
- Hough, L. M. (2008). *Development of the Accomplishment and Experience Record Inventory and Rating Scales for Selecting Law School Applicants (DG #38.1)*. Berkeley, CA: Boalt Hall School of Law, University of California at Berkeley.
- Jones, D. P., & Hough, L. M. (2008). *Expert Report Prepared in the Matter of the United States v. City of New York (DG #37.1)*. Washington, DC: U.S. Department of Justice.
- Hough, L. M., Fandre, J., & Oswald, F. S. (2008). *Understanding and Measuring Global Mindset (DG #36.1)*. Glendale, AZ: Thunderbird School of Global Management.

- Hough, L. M. (2005). *Evaluation of Validity Studies of Kimberly-Clark Operative Jobs at Chester, PA Facility* (DG #34). Washington, DC: U. S. Department of Labor, OFCCP.
- Jones, D. P., & Hough, L. M. (2004). *Rebuttal Report of David P. Jones, Ph.D. & Leaetta M. Hough, Ph.D. (Expert Report)*. U.S. v. City of Erie, PA (DG #35). Washington, DC: U. S. Department of Justice.
- Hough, L. M. (2004). *Evaluation of Procter & Gamble Dover Wipes Plant Technician Job Analysis and Validation Studies* (DG #33). Washington, DC: U. S. Department of Labor, OFCCP.
- Hough, L. M., & Russell, T. (2004). *Initial Alcoa Report* (DG #32). Pittsburgh, OH: Alcoa Inc.
- Ones, D. S., Hough, L. M., Dilchert, S., & Viswesvaran, C. (2004). *KCSO Deputy Sheriffs: Selection and Appraisal in the 21<sup>st</sup> Century* (DG #31). Seattle, WA: King County Sheriff's Office.
- Curnow, C., Bocketti, B., & Hough, L. (2004). *Waste Water Treatment Plant Operator Validation Report* (DG #29.20). Alabama: Personnel Board of Jefferson County.
- Hough, L. M., Curnow, C. (2004). *Evaluation of the Personnel Reaction Blank (PRB) for Selecting Waste Water Treatment Plant Operators* (DG #29.10). Alabama: Personnel Board of Jefferson County.
- Hough, L. M. (2002). *Evaluation of the City of Los Angeles Fire Department 1998 and 2000 Test Battery* (DG #28). Washington, DC: U. S. Department of Justice.
- Hough, L. M. (2002). *Hiring in the Spirit of Service: Definitions, Possibilities, Evidence, and Recommendations* (DG #27). Washington, DC: Community Policing Consortium, Office of Community Oriented Policing Services, U.S. Department of Justice.
- Hough, L. M. (2001). *B-PAD Results: Selection Ratios & Adverse Impact Ratios – Las Vegas, Nevada Metro Police Department* (DG #27.2). St. Paul, MN: Dunnette Group, Ltd.
- Hough, L. M. (2001). *Importance of Personality Characteristics for Effective Firefighter Performance in the Chicago Fire Department* (DG #26). Chicago, IL: Chicago Lawyers' Committee for Civil Rights Under Law, Inc.
- Wanberg, C., Hough, L., & Song, Z. (2001). *DES/U of M Profiling Study: Needs Assessment Inventory Recommendations* (DG #25). Minneapolis, MN: University of Minnesota.
- Wanberg, C., Hough, L., Song, Z., & Tenneson, N. (2001). *MN Department of Economic Security (DES)/University of MN Profiling Study Descriptive Summary of Responses to Time 2 Survey* (DG #24). St. Paul, MN: MN Department of Economic Security.
- Wanberg, C., Hough, L., Tenneson, N., & Song, Z. (2000). *MN Department of Economic Security (DES)/University of MN Profiling Study: Summary of Preliminary Data* (DG #23). St. Paul, MN: MN Department of Economic Security.
- Hough, L. M. (2000). *American Composers Forum Competency Model and HRM Tools* (DG #21). St. Paul, MN: The Dunnette Group, Ltd.
- Hough, L. M. (2000). *Comments on Dr. Gerald V. Barrett's Expert Report in the matter of U.S. v. City of Garland, TX* (DG #20.2). Washington, DC: U. S. Department of Justice.

- Hough, L. M. (2000). *Evaluation of Police and Fire Selection Procedures Used by the City of Garland: Expert Report* (DG #20). Washington, DC: U. S. Department of Justice.
- Hough, L. M. (2000). *Material Prepared in Defense of Bell Atlantic's UTB: Labor Grievance Case 2* (DG #18). St. Paul, MN: The Dunnette Group, Ltd.
- Hough, L. M. (2000). *Development of a Content-valid Competency Model & HRM Systems & Tools for SONY Managers* (Vol. 1-3) (DG #17). St. Paul, MN: The Dunnette Group, Ltd.
- Hough, L. M. (1999). *Expert Report: Stauffer v. Taylor* (DG #19). St. Paul, MN: The Dunnette Group, Ltd.
- Hough, L. M. (1998). *Evaluation of Police & Firefighter Selection Procedures used by the City of Belleville, IL: Preliminary Report* (DG #12). St. Paul, MN: The Dunnette Group, Ltd.
- Hough, L. M. (1998). *Responsibilities & Competency/Technical Knowledge Profiles for Microsoft Consultant Services Enterprise Program Manager (EPM) & Partner Program Manager (PPM) Positions* (DG #11). St. Paul, MN: The Dunnette Group, Ltd.
- Hough, L. M. (1997). *Development of Competency Model, Role Description Questionnaire, & Selection Tools for Electric Power Research Institute Organizational Restructuring* (DG #10). St. Paul, MN: The Dunnette Group, Ltd.
- Hough, L. M. (1997). *Evaluation of Nash Finch Employment Practices: Expert Witness Report [Karen Feist v. Nash Finch]* (DG #9). St. Paul, MN: The Dunnette Group, Ltd.
- Hough, L. M., (1997). *Competency, Technical Knowledge, and Role/Responsibility Profiles for Microsoft Consultant Services (MCS) Positions* (DG #8). St. Paul, MN: The Dunnette Group, Ltd.
- Hough, L. M. (1997). *Bell Atlantic Universal Test Battery (UTB): Addendum to Final Report* (DG #7). St. Paul, MN: The Dunnette Group, Ltd.
- Hough, L. M., & Arad, S. (1996). *Competency, Technical Knowledge, and Role/Responsibility Profiles for Microsoft Systems Engineering Career Family Positions* (DG #5). St. Paul, MN: The Dunnette Group, Ltd.
- Hough, L. M. (1996). *Review of City of Belleville Selection Decisions* (DG #4). St. Paul, MN: The Dunnette Group, Ltd.
- Hough, L. M. (1996). *Review of John Hunter Report and John Hunter and Richard Singleton Testimony* (DG #2). St. Paul, MN: The Dunnette Group, Ltd.
- Hough, L. M. (1996). *Evaluation of Police and Firefighter Selection Procedures Used by the City of Torrance, California* (DG #1). St. Paul, MN: The Dunnette Group, Ltd.
- Hough, L. M., & Barge, B. N. (1995). *Development of Vocational Interests and Needs Inventories: AVOICE and JOB* (Institute Report #260). Minneapolis: Personnel Decisions Research Institutes, Inc.
- Hough, L. M. (1995). *Evaluation of Patrol Officer (Police) and Firefighter Selection Processes: City of Belleville, IL* (Institute Report #258). Minneapolis: Personnel Decisions Research Institutes, Inc.
- Hough, L. M. (1995). *Nassau County, New York/U.S. Department of Justice: Report on personality variables (LEAP)*. Minneapolis: Personnel Decisions Research Institutes, Inc.

- Hough, L. M., & Schneider, R. J. (1994). *IDS National Needs Assessment Study* (Institute Report #251). Minneapolis: Personnel Decisions Research Institutes, Inc.
- Houston, J. S., Schneider, R. J., McKee, A., & Hough, L. M. (1994). *Development of a Content Valid Competency Model for NYNEX Executive Assistants* (Institute Report #248). Minneapolis: Personnel Decisions Research Institutes, Inc.
- Hough, L. M., Houston, J. S., Schneider, R. J., & McKee, A. (1994). *Development of a Content Valid Competency Model for NYNEX Managers* (Institute Report #247). Minneapolis: Personnel Decisions Research Institutes, Inc.
- Hough, L. M. (1993). *Results of Validity Studies That Used Personality, Interest, and Biodata Scales to Predict Police Officer Performance* (Nassau County, NY/U.S. Department of Justice). Minneapolis: Personnel Decisions Research Institutes, Inc.
- Hough, L. M., Kamp, J., Ashworth, S. D. (1993). *Development of Project A Temperament Inventory: Assessment of Background and Life Experiences (ABLE)* (Institute Report #259). Minneapolis: Personnel Decisions Research Institutes, Inc.
- Dohm, T. E., & Hough, L. M. (1993). *Bell Atlantic Cut Score Analyses and Revisions* (Institute Report #242). Minneapolis: Personnel Decisions Research Institutes, Inc.
- Hough, L. M. (1993). *Evaluation of the City of Atlanta Firefighter Promotion Procedures* (Institute Report #238). Minneapolis: Personnel Decisions Research Institutes, Inc.
- Hough, L. M., Carter, G. W., Dohm, T. E., Nelson, L. C. & Dunnette, M. (1993). *Development and Validation of the "Universal Test Battery": A Computerized Selection System for Non-management Employees at Bell Atlantic* (Institute Report #219). Minneapolis: Personnel Decisions Research Institutes, Inc.
- Hough, L. M. (1992). *Summary of Criterion-related Validity Studies that Used MMPI or CPI Scales to Predict Job Performance in Protective Service Occupations* (Institute Report #220). Submitted to Wayne Cascio, APA amicus brief in Soroka v. Target case. Minneapolis: Personnel Decisions Research Institutes, Inc.
- Nelson, L. C., Hough, L. M. (1992). *Skill and Ability Analysis and Job Family Assignment for Case Worker* (Institute Report #229A). Minneapolis: Personnel Decisions Research Institutes, Inc.
- Nelson, L. C., Hough, L. M. (1992). *Skill and Ability Analysis and Job Family Assignment for Administrative Representative* (Institute Report #229B). Minneapolis: Personnel Decisions Research Institutes, Inc.
- Nelson, L. C., Hough, L. M. (1992). *Skill and Ability Analysis and Job Family Assignment for Senior Traffic Office Clerk* (Institute Report #229C). Minneapolis: Personnel Decisions Research Institutes, Inc.
- Paullin, C. J., Hough, L. M., & Dohm, T. (1991). *Development of a Content-valid Structured Interview for the Entry-level Firefighter Position in the Minneapolis Fire Department* (Institute Report #212). Minneapolis: Personnel Decisions Research Institutes, Inc.

- Hough, L. M., & Hallam, G. L. (1991). *Examination of the Report Entitled "Analysis and Recommendations of the Proposed Fire Department Affirmative Action Plan Re: Carter v. Gallagher" Prepared by the Minneapolis Department of Civil Rights* (Institute Report #204). Minneapolis: Personnel Decisions Research Institutes, Inc.
- Hanson, M. A., Hallam, G. L., Hough, L. M., Carter, G. W., & McGuire, D. P. (1990, December). *Controlling Score Distortion on the Adaptability Screening Profile (ASP): Preliminary research*. Navy Personnel Research and Development Center.
- Hough, L. M., Russell, T. L., Keyes, M. A., & Zaugg, L. B. (1990). *Development of Human Resource Management Systems for OGC Attorneys at the U. S. General Accounting Office* (Institute Report #184). Minneapolis: Personnel Decisions Research Institutes.
- Peterson, N. G., Russell, T. L., Hallam, G., Hough, L. M. Owens-Kurtz, C., Gialluca, K., & Kerwin, K. (1990). Analysis of the experimental predictor battery: LV sample. In J. P. Campbell & L. M. Zook (Eds.), *Building and Retaining the Career Force: New Procedures for Assessing and Assigning Army Enlisted Personnel, Annual Report, 1990 Fiscal Year* (ARIFR-PRD-90-6). Alexandria, VA: U. S. Army Research Institute for the Behavioral and Social Sciences.
- Hough, L. M., & Zaugg, L. B. (1990). *Implementation of Performance Appraisal Systems for APSS General Schedule and Wage Grade Job Series at the U. S. General Accounting Office* (Institute Report #198). Minneapolis: Personnel Decisions Research Institutes, Inc.
- Hough, L. M., Zaugg, L. B., Keyes, M. A., & Russell, T. L. (1990). *Development of Performance Appraisal Systems for General Schedule and Wage Grade Job Series at the U. S. General Accounting Office* (Institute Report #194). Minneapolis: Personnel Decisions Research Institutes.
- Hough, L. M. (1989). *Implementation Issues for Biodata Measures* (Institute Report #175). Minneapolis: Personnel Decisions Research Institutes, Inc.
- Hough, L. M., & Russell, T. L. (1989). *Analysis of Administrative Professional and Support Staff (APSS) Positions in 74 General Schedule and Wage Grade Job Series at the U.S. General Accounting Office: Addendum* (Institute Report #200). Minneapolis: Personnel Decisions Research Institutes, Inc.
- Hough, L. M., & Zaugg, L. B. (1989). *Development and Implementation of a Broad-Banded Pay-for-Performance and Promotion System for Attorneys in the Office of General Counsel at the U. S. General Accounting Office* (Institute Report #183). Minneapolis: Personnel Decisions Research Institutes, Inc.
- Russell, T. L., & Hough, L. M. (1989). *Identification of Activity Components and Job Families for Administrative, Professional, and Support Staff (APSS) General Schedule and Wage Grade Job Series at the U.S. General Accounting Office* (Institute Report #173). Minneapolis: Personnel Decisions Research Institutes, Inc.
- Russell, T. L., & Hough, L. M. (1989). *Identification and Content Validation of Activity Components and Skill/ability Linkages for General Schedule and Wage Grade Job Series at the U.S. General Accounting Office* (Institute Report #174). Minneapolis: Personnel Decisions Research Institutes, Inc.

- Bosshardt, M. J., & Hough, L. M. (1988). *Development of a Structured Interview for AT&T Foreign Assignment Positions* (Institute Report #152). Minneapolis: Personnel Decisions Research Institute.
- Russell, T. L., & Hough, L. M. (1988). *Analysis of Administrative, Professional, and Support Staff (APSS) Positions in 74 General Schedule and Wage Grade Job Series at the U.S. General Accounting Office* (Institute Report #158). Minneapolis: Personnel Decisions Research Institute.
- Wise, L. L., Hough, L. M., Szenas, P. L., & Keyes, M. A. (1988). *The Armed Services Applicant Profile (ASAP) Fairness Analyses*. Washington, DC.: American Institutes for Research.
- Bosshardt, M. J., Carter, G. W., & Hough, L. M. (1987). *Identification of Critical Dimensions for Foreign Assignment Selection* (Institute Report #137). Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Barge, B. N., & Kamp, J. D. (1987). Non-cognitive measures: Pilot testing. In Norman G. Peterson (Ed.), *Development and Field Test of the Trial Battery for Project A* (pp. 7.1-7.48). (ARI Technical Report #739). Alexandria, VA: U.S. Army Research Institute for the Behavioral and Social Sciences.
- Hough, L. M., McCloy, R. A., Ashworth, S. D., & Hough, M. M. (1987). Analysis of temperament/biodata, vocational interest, and work environment preference measures: Concurrent validity sample. In Norman G. Peterson (Ed.), *Analysis of Project A Trial Battery* (ARI Technical Report # ). Alexandria, VA: U.S. Army Research Institute for the Behavioral and Social Sciences.
- Hough, L. M., McGue, M. K., Houston, J. S., & Pulakos, E. D. (1987). Non-cognitive measures: Field tests. In Norman G. Peterson (Ed.), *Development and Field Test of the Trial Battery for Project A* (pp. 8.1-8.39). (ARI Technical Report #739). Alexandria, VA: U. S. Army Research Institute for the Behavioral and Social Sciences.
- Hough, L. M., Russell, T. L., & Keyes, M. A. (1987). *Development and Validation of Promotion and Entry-level Selection Systems for Attorneys in the Office of General Counsel at the U.S. General Accounting Office* (Institute Report #143). Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Russell, T. L., McKenna, D. D., Fisher, G. P., & Stern, B. (1987). *Identification and Content Validation of Selection and Training Elements for Positions in the U. S. Army Supply, Materiel Maintenance, and Transportation Management Civilian Career Programs* (Institute Report #112). Minneapolis: Personnel Decisions Research Institute.
- Peterson, N. G., McHenry, J. J., Dunnette, M. D., Toquam, J. L., Hough, L. M., Barge, B. N., Rosse, R. L., Houston, J. S., & Corpe, V. A. (1987). Formulation of the trial battery. In Norman G. Peterson (Ed.), *Development and Field Test of the Trial Battery for Project A*, (ARI Technical Report #739). Alexandria, VA: U. S. Army Research Institute for the Behavioral and Social Sciences.

- Barge, B. N., & Hough, L. M. (1986). Utility of biographical assessment: A review and integration of the literature. In L. M. Hough (Ed.), *Utility of Temperament, Biodata, and Interest Assessment for Predicting Job Performance: A Review of the Literature* (pp. 91-130). (ARI Research Note #88-02), Alexandria, VA: U.S. Army Research Institute for the Behavioral and Social Sciences.
- Barge, B. N., & Hough, L. M. (1986). Utility of interest assessment: A review and integration of the literature. In L. M. Hough (Ed.), *Utility of Temperament, Biodata, and Interest Assessment for Predicting Job Performance: A Review of the Literature* (pp. 131-188). (ARI Research Note #88-02), Alexandria, VA: U.S. Army Research Institute for the Behavioral and Social Sciences.
- Hough, L. M. (Ed.) (1986). *Utility of Temperament, Biodata, and Interest Assessment for Predicting Job Performance: A Review and Integration of the Literature* (ARI Research Note #88-02). Alexandria, VA: U.S. Army Research Institute for the Behavioral and Social Sciences.
- Hough, L. M., & Ashworth, S. D. (1986). *Project A Concurrent Validity Data Analyses: Temperament and Interest Predictors (Trial Battery)*. Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., McCloy, R. A., Ashworth, S. D., & Hough, M. M. (1986). *Project A Concurrent Validity Data Analyses: Non-cognitive Predictors (Revised Trial Battery Scales and Composites)*. Minneapolis: Personnel Decisions Research Institute.
- Kamp, J. D., & Hough, L. M. (1986). Utility of personality assessment: A review and integration of the literature. In L. M. Hough (Ed.), *Utility of Temperament, Biodata, and Interest Assessment for Predicting Job Performance: A Review and Integration of the Literature* (pp. 1-90). (ARI Research Note #88-02). Alexandria, VA: U.S. Army Research Institute for the Behavioral and Social Sciences.
- Russell, T. L., & Hough, L. M. (1986). *Training Needs Analysis of Attorney Positions in the Office of General Counsel at the U.S. General Accounting Office* (Institute Report #110). Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., McGue, M. K., Houston, J. S., & Barge, B. N. (1985). *Pretest Results and Faking Study Results of Temperament and Interest Inventories Developed to Predict Job Performance of Army Enlisted Personnel*. Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., & Russell, T. L. (1985). *Development of Behavior-based Performance Dimensions and Rating Scales for Army General Officers: Brigade Commanders and Program Managers*. Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Russell, T. L., Rosse, R. L., McGue, M. K., & Keyes, M. A. (1985). *Analysis of Professional (Attorney) Positions in the Office of General Counsel at the U.S. General Accounting Office* (Institute Report #100). Minneapolis: Personnel Decisions Research Institute.

- Keyes, M. A., Hough, L. M., Russell, T. L., & Pulakos, E. D. (1985). *Development of a Performance Appraisal System for Attorney Positions in the Office of the General Counsel at the U.S. General Accounting Office* (Institute Report #104). Minneapolis: Personnel Decisions Research Institute.
- Russell, T. L., Hough, L. M., Keyes, M. A., & Pulakos, E. D. (1985). *Identification of Job Performance Dimensions and Required Knowledges, Skills, and Abilities for Attorney Positions in the Office of General Counsel at the U.S. General Accounting Office* (Institute Technical Report #101). Minneapolis: Personnel Decisions Research Institute.
- Barge, B. N., Hough, L. M., & Dunnette, M. D. (1984). *Behavioral Reliability: A Review of Academic Literature and Organizational Programs* (Institute Report #96). Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M. (1984). *Identification and Development of Temperament and Interest Constructs and Inventories for Predicting Job Performance of Army Enlisted Personnel*. Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Houston, J. S., Barge, B. N., Kamp, J. D., & Pulakos, E. D. (1984). *Pretest Results of the Temperament (ABLE) and Interest (AVOICE) Inventories*. Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Keyes, M. A., & Dunnette, M. D. (1984). *Development and Validation of Personnel Selection Systems for Eight Library of Congress Professional Series*. (Institute Report #91). Minneapolis: Personnel Decisions Research Institute.
- Lammlein, S. E., & Hough, L. M. (1984). *Content Validation Study for Library of Congress Special Police* (Institute Report #92). Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Kamp, J. D., & Barge, B. N. (1983). *Evaluation of Non-cognitive Predictors for Inclusion in Preliminary Battery for Selecting Army Enlisted Personnel*. Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Sevy, B. A., & Dunnette, M. D. (1983). *Development and Criterion-related Validation of a Library of Congress Special Police Selection System* (Institute Report #89). Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Stein, E., & Dulaney, K. K. (1983). *The Classification of Job Applicants into Equal Employment Opportunity Categories* (Institute Report #83). Minneapolis: Personnel Decisions Research Institute.
- Dunnette, M. D., Rosse, R. L., Houston, J. S., Hough, L. M., Toquam, J. L., Lammlein, S. E., King, K. W., Bosshardt, M. J., & Keyes, M. A. (1982). *Development and Validation of an Industry-wide Electric Power Plant Operator Selection System* (Institute Report #72). Minneapolis: Personnel Decisions Research Institute.
- Peterson, N. G., Houston, J. S., & Hough, L. M. (1982). *Development and Administration of Job Task Questionnaires for Nuclear Power Plant Mechanics, Electricians, and Instrument and Control Technicians* (Institute Report #76). Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M. (1981). *Development and Evaluation of an Accomplishment-based Method of Selecting and Promoting Professionals*. Minneapolis: University of Minnesota.

- Hough, L. M., Dunnette, M. D., Bartlett, C. J., Goldstein, I. L., Keyes, M. A., King, K. W., Weiss, S. J., Levine, G. S., & Buxton, V. M. (1980). *Validation of Selection and Promotion Procedures for Professional Employees* (Institute Report #50). Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Taylor, S. H., Bosshardt, M. J., & Dunnette, M. D. (1980). *Electric Power Plant Study: Predicting Job Performance of Electrical Power Plant Operators: A Literature Review* (Institute Report #45). Minneapolis: Personnel Decisions Research Institute.
- Dunnette, M. D., Hough, L. M., & Rosse, R. R. (1978). *Development of Task and Job Taxonomies for Career and Manpower Planning in a Nationwide Retail Organization* (Institute Report #23b). Minneapolis, MN: Personnel Decisions Research Institute.
- Borman, W. C., Hough, L. M., & Dunnette, M. D. (1976). *Development of Behaviorally-based Rating Scales for Evaluating the Performance of U.S. Navy Recruiters* (Institute Report #6). (Navy Personnel Research and Development Center Technical Report TR-76-31).
- Borman, W. C., Hough, L. M., & Dunnette, M. D. (1976). *Performance Ratings: An Investigation of Reliability, Accuracy, and Relationships between Individual Differences and Rater Error* (Institute Report #7). Minneapolis: Personnel Decisions Research Institute.
- Borman, W. C., Dunnette, M. D., & Hough, L. M. (1975). *A Study of the Merrill Lynch Account Executive Job* (Institute Report #3). Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M. (1972). *An Evaluation of the Clinton-Burroughs 1970-71 Busing Program*. Minneapolis: Personnel Decisions, Inc.
- Arvey, R. D., & Hough, L. M. (1970). *Description and Evaluation of Minneapolis Reserve Teacher Cadre Training Program*. Minneapolis: Personnel Decisions, Inc.

## **QUESTIONNAIRES, HR SYSTEMS, & TESTS**

- Hough, L. M. (2015). *Assessment of Serial Innovation Potential* (Life Experiences Questionnaire; Personal Preferences Questionnaire; Characteristics Checklist; and Working Memory Capacity). St. Paul, MN: The Dunnette Group, Ltd.
- Paullin, C., Hough, L. M., & Caramagno, J. (2015). *Administrative Law Judge Adult Disability Case Adjudication Simulations*. Alexandria, VA: HumRRO.
- Paullin, C., Hough, L. M., & Caramagno, J. (2015). *Administrative Law Judge Activities Survey*. Alexandria, VA: HumRRO.
- Jones, D. P., Hough, L. M., & Gottschalk, R. (2012). *Can Do – Will Do*. East Jordan, MI: HirePayoff.
- Hough, L. M., & Shultz, M. (2011). *Accomplishment and Experience Record Inventory and Rating Scales for Selecting Law School Applicants*. San Francisco, CA: Golden Gate Law School.
- Hough, L. M., Fandre, J., & Oswald, F. (2008). *Global Mindset Inventory*. Glendale, AZ: Thunderbird School of Global Management.

- Hough, L. M. (2007). *Performance Management System for Executive Directors of Associations*. St. Paul, MN: Dunnette Group, Ltd.
- Hough, L. M. (2007). *Accomplishment and Experience Record Inventory and Rating Scales for Selecting Law School Applicants*. Berkeley, CA: Boalt Hall School of Law, University of California at Berkeley.
- Hough, L. M., & Russell, T. (2004). *Skilled Trades Selection & Training Products*. Dunnette Group, Ltd.: St. Paul, MN
- Wanberg, C., & Hough, L. (2000). *Job Search and Reemployment Survey: Follow-up Survey*. St. Paul, MN: MN Department of Economic Security.
- Hough, L. M. (2000). *American Composers Forum Competency Model & HRM Tools*. St. Paul, MN: American Composers Forum.
- Wanberg, C., & Hough, L. (2000). *Job Search and Reemployment Survey*. St. Paul, MN: MN Department of Economic Security.
- Sommers, C., & Hough, L. M. (1999). *Competency Model & Competency-based Training Guide for Sony Human Resource Managers*. Park Ridge, NJ: Sony Electronics Corp.
- Hough, L.M. (1998). *Competency Model, Performance Management System (including 360° Feedback Tool and Performance Appraisal Rating Scales), and Training Guide for Sony Leaders*. New York City, NY: Sony Corporation of America.
- Hough, L. M. (1998). *West Group Competency Model & Performance Management System (including 360° Feedback Tool for non-exempt employees and their supervisors)*. Eagan, MN: West Group.
- Hough, L. M. (1998). *Microsoft Enterprise Program Manager (EPM) and Partner Program Manager (PPM) staffing and career planning and development tool*. Redmond, WA: Microsoft Corporation.
- Hough, L. M. (1998). *LEAD for Results*. St. Paul, MN: The Dunnette Group, Ltd.
- Hough, L. M. (1997). *Building Blocks for Career and Organizational Growth (COG)*. St. Paul, MN: The Dunnette Group, Ltd.
- Hough, L. M. (1997). *Survey of Life Experiences: South African edition*. St. Paul, MN: The Dunnette Group, Ltd.
- Hough, L. M. (1997). *Competency Model - Success Factors, Competencies, & Definitions*. St. Paul, MN: The Dunnette Group, Ltd.
- Hough, L. M. (1997). *EPRI Job Description Questionnaire & Rating Form*. St. Paul, MN: The Dunnette Group, Ltd.
- Hough, L. M. (1997). *Competency Model Selection Tool - Accomplishment Record*. St. Paul, MN: The Dunnette Group, Ltd.
- Hough, L. M. (1997). *Competency Model Selection Tool - Self Assessment of Competencies*. St. Paul, MN: The Dunnette Group, Ltd.
- Hough, L. M. (1997). *Competency Model Selection Tool - Self Assessment of Function-Specific Technical Knowledges*. St. Paul, MN: The Dunnette Group, Ltd.

- Hough, L. M. (1997). *Competency Model Selection Tool Scoring System*. St. Paul, MN: The Dunnette Group, Ltd.
- Hough, L. M. (1997). *Microsoft consultant service's career planning and development tool*. Redmond, WA: Microsoft Corporation.
- Hough, L. M. (1996). *Survey of Life Experiences: An omnibus temperament inventory*. St. Paul, MN: The Dunnette Group, Ltd.
- Hough, L. M., & Arad, S. (1996). *Microsoft systems engineering career planning and development tool*. Redmond, WA: Microsoft Corporation.
- Hough, L. M. (1995). *Microsoft performance management, training and development, and career planning systems*. Redmond, WA: Microsoft Corporation.
- Hough, L. M., & Arad, S. (1995). *Training and development guide for Microsoft competencies*. Redmond, WA: Microsoft Corporation.
- Hough, L. M. (1995). *Microsoft competency tool*. Redmond, WA: Microsoft Corporation.
- Arad, S., & Hough, L. M. (1994). *Behaviorally-anchored performance measurement scales for Nassau County patrol officer position*. Washington, DC.: U.S. Department of Justice.
- Hough, L. M. (1994). *Life Experiences and Preferences Inventory (LEAP)*. Minneapolis: Personnel Decisions Research Institutes, Inc.
- Hough, L. M., Carter, G. W., Dohm, T. E., & Nelson, L. C. (1992). *Universal Test Battery (UTB): Computer administered and interpreted criterion-valid selection and placement system for non-management employees*. [Spelling, Clerical Speed and Accuracy, Concept Formation, Number Computation, Spatial Visualization, Vocabulary, Number Series, Mechanical Comprehension, and "Candidate Assessment of Background and Life Experiences" (Influencing Others, Achievement, Energy, Dependability, People Orientation, and Adjustment)]. Arlington, VA: Bell Atlantic.
- Hough, L. M., & Nelson, L. C. (1991). *Bell Atlantic performance measurement rating scales for associate positions*. [Job families: Operator and Other Jobs with Brief Non-Sales Customer Interactions; Customer Services, Sales, and Collection; Central Office and Switching Equipment Technician (Craft); Other Craft; Maintenance Administration; Clerical and Administrative Support; Warehouse, Transportation, and Coin Collection; Repair Service; Construction Support; Mechanical; and Marketing]. Minneapolis: Personnel Decisions Research Institutes, Inc.
- Hough, L. M., Carter, G. W., Nelson, L. (1991). *Bell Atlantic job analysis questionnaire for associate positions*. Minneapolis: Personnel Decisions Research Institutes, Inc.
- Paullin, C. J., Lammlein, S., Dohm, T. E., Hough, L. M. (1991). *User's guide to the Minneapolis Fire Department structured interview* (Institute Report #213). Minneapolis: Personnel Decisions Research Institutes, Inc.
- Zaugg, L. B., Hough, L. M., Keyes, M. K. (1990). *User's manual: Performance appraisal system for administrative, professional, and support staff*. Washington, DC: U. S. General Accounting Office.

- Hough, L. M., Zaugg, L. B., & Keyes, M. K. (1990). *User's manual: Performance appraisal system for wage grade employees*. Washington, DC: U.S. General Accounting Office.
- Hough, L. M. (1989). *AT&T foreign assignment career decisions inventory*. Minneapolis: Personnel Decisions Research Institutes, Inc.
- Hough, L. M., Paullin, C. J., & Wyman, C. C. (1989). *Manual for scoring applicant responses to "AT&T Foreign Assignment Career Decisions Inventory"*. Minneapolis: Personnel Decisions Research Institutes, Inc.
- Russell, T. L., Hough, L. M., Keyes, M. A., & Zaugg, L. B. (1989). *The OGC attorney certification and promotion system manual*. Minneapolis: Personnel Decisions Research Institute.
- Bosshardt, M. J., & Hough, L. M. (1988). *Interview manual for AT&T foreign assignment positions*. Minneapolis: Personnel Decisions Research Institute.
- Dubois, D. A., & Hough, L. M. (1988). *U. S. General Accounting Office position description questionnaire: Administrator's manual for administrative, professional, and support staff positions*. Minneapolis: Personnel Decisions Research Institute.
- Russell, T. L., Hough, L. M., Keyes, M. A., DuBois, D. A., & Hough, M. M. (1988). *U. S. General Accounting Office position description questionnaire for wage grade employees*. Minneapolis: Personnel Decisions Research Institute.
- Russell, T. L., Hough, L. M., Keyes, M. A., DuBois, D. A., & Hough, M. M. (1988). *U. S. General Accounting Office position description questionnaire for general schedule employees in administrative, professional, and support positions*. Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Russell, T. L., & Pulakos, E. D. (1987). *Career planning, goal setting, and training: Attorney's manual for performance and career development* (Institute Report #129). Minneapolis: Personnel Decisions Research Institute.
- Russell, T. L., & Hough, L. M. (1987). *Conducting employment interviews: A manual for OGC attorneys*. Minneapolis: Personnel Decisions Research Institute.
- Russell, T. L., Hough, L. M., & Keyes, M. A. (1987). *OGC manual for hiring entry-level GAO attorneys*. Minneapolis: Personnel Decisions Research Institute.
- Pulakos, E. D., Russell, T. L., Keyes, M. A., & Hough, L. M. (1986). *Attorney's manual: OGC attorney performance appraisal system*. Minneapolis: Personnel Decisions Research Institute.
- Pulakos, E. D., Russell, T. L., Keyes, M. A., & Hough, L. M. (1986). *Supervisor's manual: OGC attorney performance appraisal system* (Institute Report #128). Minneapolis: Personnel Decisions Research Institute.
- Russell, T. L., & Hough, L. M. (1986). *Administrator's manual: CIVPERCEN selection and training elements workshops*. Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., & Russell, T. L. (1985). *Performance appraisal rating scales for army general officers*. Minneapolis: Personnel Decisions Research Institute.

- Hough, L. M., & Barge, B. A. (1984). *Army vocational interest career examination (AVOICE)*. Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Kamp, J. D., & Barge, B. A. (1984). *Assessment of background and life experiences (ABLE)*. Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Keyes, M. A., & Sevy, B. A. (1984). *User's manual: Library of Congress supervisory librarian selection instruments and scoring instructions* (Biographical Information Inventory, Accomplishment Record, Non-English Language Skill, and Structured Interview). Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Keyes, M. A., & Sevy, B. A. (1984). *User's manual: Subject cataloger librarian selection instruments and scoring instructions* (Biographical Information Inventory, Non-English Language Skills Inventory, and Structured Interview). Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Keyes, M. A., & Sevy, B. A. (1984). *User's manual: Descriptive cataloger librarian selection instruments and scoring instructions* (Biographical Information Inventory, Non-English Language Skills Inventory, and Structured Interview). Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Keyes, M. A., & Sevy, B. A. (1984). *User's manual: Reference librarian selection instruments and scoring instructions* (Biographical Information Inventory, Non-English Language Skills Inventory, and Structured Interview). Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Keyes, M. A., & Sevy, B. A. (1984). *User's manual: Automated system librarian selection instruments and scoring instructions* (Biographical Information Inventory, Non-English Language Skills Inventory, and Structured Interview). Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Keyes, M. A., & Sevy, B. A. (1984). *User's manual: Acquisition librarian selection instruments and scoring instructions* (Biographical Information Inventory, Non-English Language Skills Inventory, and Structured Interview). Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Keyes, M. A., & Sevy, B. A. (1984). *User's manual: Attorney selection instruments and scoring instructions* (Biographical Information Inventory, Accomplishment Record, Interests and Opinions Inventory, and Structured Interview). Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Keyes, M. A., & Sevy, B. A. (1984). *User's manual: Computer programmer/analyst selection instruments and scoring instructions* (Biographical Information Inventory, Accomplishment Record, Interests and Opinions Inventory, and Structured Interview). Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Keyes, M. A., & Sevy, B. A. (1984). *User's manual: Copyright cataloger selection instruments and scoring instructions* (Biographical Information Inventory, Accomplishment Record, Interests and Opinions Inventory, and Structured Interview). Minneapolis: Personnel Decisions Research Institute.

- Hough, L. M., Keyes, M. A., & Sevy, B. A. (1984). *User's manual: Copyright examiner/information specialist selection instruments and scoring instructions* (Biographical Information Inventory, Accomplishment Record, Interests and Opinions Inventory, and Structured Interview). Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Keyes, M. A., & Sevy, B. A. (1984). *User's manual: Economist selection instruments and scoring instructions* (Biographical Information Inventory, Accomplishment Record, Interests and Opinions Inventory, and Structured Interview). Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Keyes, M. A., & Sevy, B. A. (1984). *User's manual: Foreign affair analyst selection instruments and scoring instructions* (Biographical Information Inventory, Accomplishment Record, Interests and Opinions Inventory, and Structured Interview). Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Keyes, M. A., & Sevy, B. A. (1984). *User's manual: Social science analyst selection instruments and scoring instructions* (Biographical Information Inventory, Accomplishment Record, Interests and Opinions Inventory, and Structured Interview). Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Keyes, M. A., & Sevy, B. A. (1984). *User's manual: Technical information specialist selection instruments and scoring instructions* (Biographical Information Inventory, Accomplishment Record, Interests and Opinions Inventory, and Structured Interview). Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Keyes, M. A., & Sevy, B. A. (1984). *User's manual: Attorney supervisor selection instruments and scoring instructions* (Biographical Information Inventory, Accomplishment Record, Interests and Opinions Inventory, and Structured Interview). Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Keyes, M. A., & Sevy, B. A. (1984). *User's manual: Library of Congress selection instruments and scoring instructions for computer programmer/analyst supervisors* (Biographical Information Inventory, Accomplishment Record, Interests and Opinions Inventory, and Structured Interview). Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Keyes, M. A., & Sevy, B. A. (1984). *User's manual: Copyright cataloger supervisor selection instruments and scoring instructions* (Biographical Information Inventory, Accomplishment Record, Interests and Opinions Inventory, and Structured Interview). Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Keyes, M. A., & Sevy, B. A. (1984). *User's manual: Copyright examiner/information specialist supervisor selection instruments and scoring instructions for* (Biographical Information Inventory, Accomplishment Record, Interests and Opinions Inventory, and Structured Interview). Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Keyes, M. A., & Sevy, B. A. (1984). *User's manual: Economist supervisor selection instruments and scoring instructions* (Biographical Information Inventory, Accomplishment Record, Interests and Opinions Inventory, and Structured Interview). Minneapolis: Personnel Decisions Research Institute.

- Hough, L. M., Keyes, M. A., & Sevy, B. A. (1984). *User's manual: Foreign affairs analyst supervisor selection instruments and scoring instructions* (Biographical Information Inventory, Accomplishment Record, Interests and Opinions Inventory, and Structured Interview). Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Keyes, M. A., & Sevy, B. A. (1984). *User's manual: Social science analyst supervisor selection instruments and scoring instructions* (Biographical Information Inventory, Accomplishment Record, Interests and Opinions Inventory, and Structured Interview). Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Keyes, M. A., & Sevy, B. A. (1984). *User's manual: Technical information specialist supervisor selection instruments and scoring instructions* (Biographical Information Inventory, Accomplishment Record, Interests and Opinions Inventory, and Structured Interview). Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., McCloy, R. A., & Barge, B. A. (1984). *Job orientation blank (JOB)*. Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Keyes, M. A., Sevy, B. A., & Dunnette, M. D. (1983). *User's guide and manual for Library of Congress special police criterion-validated selection instruments* (Self-Assessment Inventory, Interests and Performance Inventory, Personal Opinion Inventory, and Structured Interview). Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M. (1982). *Library of Congress special police private performance appraisal rating scales*. Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M. (1982). *Library of Congress special police supervisor performance appraisal rating scales*. Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., & Grabow, K. (1982). *Library of Congress attorney performance appraisal rating scales*. Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., & Grabow, K. (1982). *Library of Congress computer programmer specialist and computer analyst performance appraisal rating scales*. Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., & Grabow, K. (1982). *Library of Congress copyright cataloger performance appraisal rating scales*. Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., & Grabow, K. (1982). *Library of Congress copyright examiner/information specialist performance appraisal rating scales*. Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., & Grabow, K. (1982). *Library of Congress economist performance appraisal rating scales*. Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., & Grabow, K. (1982). *Library of Congress foreign affairs analyst performance appraisal rating scales*. Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., & Grabow, K. (1982). *Library of Congress librarian performance appraisal rating scales*. Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., & Grabow, K. (1982). *Library of Congress social science analyst performance appraisal rating scales*. Minneapolis: Personnel Decisions Research Institute.

- Hough, L. M., & Grabow, K. (1982). *Library of Congress technical information specialist performance appraisal rating scales*. Minneapolis: Personnel Decisions Research Institute.
- Dunnette, M. D., Hough, L. M., King, K. W., & Rosse, R. L. (1981). *User's manual: EEI power plant operator selection system* (Institute Report #69). Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M. (1981). *Job task questionnaire for nuclear power plant electricians*. Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M. (1981). *Job description interview for Library of Congress positions*. Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M. (1981). *Library of Congress position description questionnaire for professionals*. Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M. (1981). *Library of Congress position description questionnaire—special police*. Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Keyes, M. A., & King, K. W. (1980). *User's guide: Accountant selection and promotion instruments* (Biographical Inventory; Interests, Opinions, and Experiences Inventory; Accomplishment Record, and Structured Interview). Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Keyes, M. A., & King, K. W. (1980). *User's guide: Attorney selection and promotion instruments* (Biographical Inventory; Interests, Opinions, and Experiences Inventory; Accomplishment Record, and Structured Interview). Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Keyes, M. A., & King, K. W. (1980). *User's guide: Computer specialist selection and promotion instruments* (Structured Interview). Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Keyes, M. A., & King, K. W. (1980). *User's guide: Consumer protection specialist/research analyst selection and promotion instruments* (Background Inventory; Interests, Opinions, and Experiences Inventory; Accomplishment Record, and Structured Interview). Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Keyes, M. A., & King, K. W. (1980). *User's guide: Economist selection and promotion instruments* (Background Inventory; Interests, Opinions, and Experiences Inventory; Accomplishment Record, and Structured Interview). Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., Keyes, M. A., & King, K. W. (1980). *User's guide: Manager selection and promotion instruments* (Background Inventory; Interests, Opinions, and Experiences Inventory; Accomplishment Record; and Structured Interview). Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M. (1979). *Job performance categories and rating scales for FTC economists*. Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., & Downing, K. A. (1979). *Job performance categories and rating scales for FTC accountants*. Minneapolis: Personnel Decisions Research Institute.

- Hough, L. M., & Dunnette, M. D. (1979). *Job performance categories and rating scales for FTC managers*. Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., & Keyes, M. A. (1979). *Job performance categories and rating scales for FTC attorneys*. Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., & Keyes, M. A. (1979). *Federal Trade Commission professional activities description questionnaire*. Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., & Lammlein, S. E. (1979). *Job performance categories and rating scales for FTC consumer protection specialists/research analysts*. Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M., & Mendel, R. (1979). *Job performance categories and rating scales for FTC computer specialists*. Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M. (1977). *Manual for administration of job activities questionnaire for retail and distribution employees*. Minneapolis: Personnel Decisions Research Institute.
- Hough, L. M. (1977). *Job activities questionnaire for retail and distribution employees*. Minneapolis: Personnel Decisions Research Institute.

## **Appendix B**

### **Material Provided to Me, Dr. Leietta M. Hough, by Plaintiffs' Attorneys and Documents Relied Upon in Report**

## **Materials Provided**

Plaintiffs' Confidential Mediation Brief, September 23, 2022  
First Joint Request for an Informal Discovery Conference (Re: Requests for Production Set 6), February 27, 2023  
Second Joint Request for an Informal Discovery Conference (Regarding Requests for Production of Documents, Set 15), February 28, 2023.  
Third Joint Request for an Informal Discovery Conference (RE: PMQ Deposition Notices), February 28, 2023  
Joint Status Conference Statement, March 13, 2023  
Plaintiffs' Sixteenth Set of Requests for Production of Documents, Nov. 18, 2022  
Stipulation and Order Regarding Confidential Information, April 2, 2019  
Corrected 4th Amended Complaint, April 14, 2021 (filed April 15, 2021)

Deposition of Kara Anderson, Transcript, December 20, 2022  
Deposition of NaShawn Bacon. Transcript, January 24, 2023  
Deposition of Jill Brahm, Transcript, April 20, 2022  
Deposition of Janet Bundrick Burnley, Transcript, January 27, 2023  
Deposition of Blaire Chaput, Transcript, January 13, 2023  
Deposition of Gina Cordero, Transcript, March 23, 2023  
Deposition of Ibelka Fernandez, Transcript, January 18, 2023  
Deposition of Karmen Fox, Transcript, December 7, 2022  
Deposition of Brett Hirst, Transcript, April 25, 2023  
Deposition of Mrudula (Chickoo) Lal, Transcript, December 15, 2022  
Deposition of Mark Larson, Transcript, February 22-23, 2023  
Deposition of Josefina Leon, Transcript, January 20, 2023  
Deposition of Avis Lewis, Transcript November 20, 2022  
Deposition of Dimitrios "Jim" Lygopoulos, Transcript, March 3, 2023  
Deposition of Julie Nagao, Transcript, April 18, 2023  
Deposition of Alison (Ali) Olsgaard, Transcript, November 17, 2022  
Deposition of Ryan Schultz, Transcript, April 7, 2023  
Deposition of Janet Pate, Transcript, April 19, 2023  
Deposition of Janet Temple, Transcript, Feb. 7, 2023  
Deposition of Rebecca Train, Transcript, July 28, 2021  
Deposition of Kaitlyn Watkins, Transcript, April 27, 2023  
Deposition of Mezghan Wahab, Transcript, April 21, 2023  
Deposition of Kelly Weirick, Transcript, April 5, 2023  
All documents produced by Disney in this matter through June 26, 2023 – DISNEY-00000001-DISNEY-000044051  
All documents produced by Plaintiffs in this matter through June 26, 2023 – PLF000001-PLF002065  
Defendants' Objections to Plaintiffs' Request for Production of Documents, Set Five  
Defendants' Objections and Response to Plaintiffs' Supplemental Request for Production, Set Nine

Defendant The Walt Disney Company's Objections and Responses to Plaintiffs' Requests for Production of Documents, Set One

Defendant The Walt Disney Company's Objections and Responses to Plaintiffs' Requests for Production of Documents, Set Two

Defendant The Walt Disney Company's Objections and Responses to Plaintiffs' Requests for Production of Documents, Set Three

Defendant The Walt Disney Company's Objections and Responses to Plaintiffs' Requests for Production of Documents, Set Four

Defendant The Walt Disney Company's Objections and Responses to Plaintiff Rasmussen's Requests for Production of Documents, Set Seven

Defendant The Walt Disney Company's Objections and Responses to Plaintiff Rasmussen's Requests for Production of Documents, Set Eight

Defendant the Walt Disney Company's Objections and Responses to Plaintiff Rasmussen's Request for Production of Documents, Set Ten.

Defendant The Walt Disney Company's Objections and Responses to Plaintiff Rasmussen's Requests for Production of Documents, Set Eleven

Defendant The Walt Disney Company's Supplemental Objections and Responses to Plaintiff Rasmussen's Requests for Production of Documents, Set Eleven

Defendant The Walt Disney Company's Objections and Responses to Plaintiff Rasmussen's Requests for Production of Documents, Set Twelve

Defendant the Walt Disney Company's Objections and Responses to Plaintiff Rasmussen's Request for Production of Documents, Set Thirteen

Defendant the Walt Disney Company's Objections and Responses to Plaintiff Rasmussen's Request for Production of Documents, Set Fourteen

Defendants' Walt Disney Pictures, Hollywood Records Inc., The Walt Disney Company, American Broadcasting Companies, Inc. Buena Vista Home Entertainment, Inc., Disney Content Sales, LLC, and Walt Disney Parks and Resorts U.S., Inc.'s Supplemental Objections and Responses to Plaintiffs' RFP, Sets 1-4

Defendants Walt Disney Pictures, Hollywood Records Inc., The Walt Disney Company, American Broadcasting Companies, Inc. Buena Vista Home Entertainment, Inc., Disney Content Sales, LLC, and Walt Disney Parks and Resorts U.S., Inc.'s Supp. And Amended Obj. and Resp. to Plaintiffs' RFP, Set Five

Defendant Walt Disney Direct-to-Consumer & International's Objections and Responses to Plaintiffs' Request for Production of Documents, Set One

Defendant Walt Disney Direct-to-Consumer International's Objections and Responses to Plaintiffs' Request for Production of Documents, Set Two

Defendant Walt Disney Direct-to-Consumer & International's Objections and Responses to Plaintiffs' Request for Production of Documents, Set Three

Defendant Walt Disney Direct-to-Consumer & International's Objections and Responses to Plaintiffs' Request for Production of Documents, Set Four

Defendant Walt Disney Imagineering Research & Development, Inc.'s Objections and Responses to Plaintiffs' Request for Production of Documents, Set One

Defendant Walt Disney Imagineering Research & Development, Inc.'s Objections and Responses to Plaintiffs' Request for Production of Documents, Set Two

Defendant Walt Disney Imagineering Research & Development, Inc.'s Objections and Responses to Plaintiffs' Request for Production of Documents, Set Three

Defendant Walt Disney Imagineering Research & Development, Inc.'s Objections and Responses to Plaintiffs' Request for Production of Documents, Set Four

Defendant Walt Disney Imagineering Research & Development, Inc.'s and Walt Disney Direct-to-Consumer & International's Objections and Responses to Plaintiffs' Request for Production of Documents, Set Five

Defendant Walt Disney Parks and Resorts U.S., Inc.'s Objections and Responses to Plaintiffs' Request for Production of Documents, Set Two

Defendant Walt Disney Parks and Resorts U.S., Inc.'s Objections and Responses to Plaintiffs' Request for Production of Documents, Set Two

Defendant Walt Disney Parks and Resorts U.S., Inc.'s Objections and Responses to Plaintiffs' Request for Production of Documents, Set Three

Defendant Walt Disney Parks and Resorts U.S., Inc.'s Supplemental Objections and Responses to Plaintiffs' Request for Production of Documents, Set Three

Defendant Walt Disney Parks and Resorts U.S., Inc.'s Supplemental Objections and Responses to Plaintiffs' Request for Production of Documents, Set Four

Defendant Walt Disney Pictures' Objections and Responses to Plaintiffs' Request for Production of Documents, Set One

Defendant Walt Disney Pictures' Objections and Responses to Plaintiffs' Request for Production of Documents, Set Two

Defendant Walt Disney Pictures' Objections and Responses to Plaintiffs' Request for Production of Documents, Set Three

Defendant Walt Disney Pictures' Supplemental Objections and Responses to Plaintiffs' Request for Production of Documents, Set Three

Defendant Walt Disney Pictures' Objections and Responses to Plaintiffs' Request for Production of Documents, Set Four

Defendant Disney Content Sales's Objections and Responses to Plaintiffs' Request for Production of Documents, Set Two

Defendant Disney Content Sales's Objections and Responses to Plaintiffs' Request for Production of Documents, Set Three

Defendant Disney Content Sales's Supplemental Objections and Responses to Plaintiffs' Request for Production of Documents, Set Three

Defendant Disney Content Sales's Objections and Responses to Plaintiffs' Request for Production of Documents, Set Four

Defendant American Broadcasting Companies, Inc.'s Objections and Responses to Plaintiffs' Request for Production of Documents, Set Two

Defendant American Broadcasting Companies, Inc.'s Objections and Responses to Plaintiffs' Request for Production of Documents, Set Three

Defendant American Broadcasting Companies, Inc.'s Supplemental Objections and Responses to Plaintiffs' Request for Production of Documents, Set Three

Defendant American Broadcasting Companies, Inc.'s Objections and Responses to Plaintiffs' Request for Production of Documents, Set Four

Defendant Buena Vista Home Entertainment, Inc.'s Objections and Responses to Plaintiffs' Request for Production of Documents, Set Two

Defendant Buena Vista Home Entertainment, Inc.'s Objections and Responses to Plaintiffs' Request for Production of Documents, Set Three

Defendant Buena Vista Home Entertainment, Inc.'s Supplemental Objections and Responses to Plaintiffs' Request for Production of Documents, Set Three

Defendant Buena Vista Home Entertainment, Inc.'s Objections and Responses to Plaintiffs' Request for Production of Documents, Set Four

Defendant Hollywood Records, Inc.'s Objections and Responses to Plaintiffs' Request for Production of Documents, Set One

Defendant Hollywood Records, Inc.'s Objections and Responses to Plaintiffs' Request for Production of Documents, Set Two

Defendant Hollywood Records, Inc.'s Objections and Responses to Plaintiffs' Request for Production of Documents, Set Three

Defendant Hollywood Records, Inc.'s Supplemental Objections and Responses to Plaintiffs' Request for Production of Documents, Set Three

Defendant Hollywood Records, Inc.'s Objections and Responses to Plaintiffs' Request for Production of Documents, Set Four

Defendant The Walt Disney Company's Objections to Plaintiff Rasmussen's General Form Interrogatories, Set One

Defendant The Walt Disney Company's Supplemental and Amended Objections and Response to Plaintiff Rasmussen's General Form Interrogatories, Set One

Defendant The Walt Disney Company's Objections and Responses to Plaintiffs' Special Interrogatories, Set One

Defendant The Walt Disney Company's Amended Objections and Responses to Plaintiffs' Special Interrogatories, Set One

Defendant The Walt Disney Company's Supplemental Objections and Responses to Plaintiffs Rasmussen's Special Interrogatories, Set One

Defendant The Walt Disney Company's Objections to Plaintiff Rasmussen's Special Interrogatories, Set Two

Defendant The Walt Disney Company's Supplemental and Amended Objections and Response to Plaintiff Rasmussen's Special Interrogatories, Set Two, No. 19

Defendant The Walt Disney Company's Supplemental and Amended Objections and Response to Plaintiff Rasmussen's Special Interrogatories, Set Two, Nos. 18-23

Defendant The Walt Disney Company's Supplemental Objections and Responses to Plaintiff Rasmussen's Special Interrogatories, Set Two

Defendant The Walt Disney Company's Objections and Responses to Plaintiff Rasmussen's Special Interrogatories, Set Three

Defendant The Walt Disney Company's Objections to Plaintiff Rasmussen's Special Interrogatories, Set Four

Defendant The Walt Disney Company's Supplemental Objections and Responses to Plaintiff Rasmussen's Special Interrogatories, Set Four

Defendant The Walt Disney Company's Supplemental and Amended Objections and Response to Plaintiff Rasmussen's Special Interrogatories, Set Four

Defendant The Walt Disney Company's Objections and Responses to Plaintiff Rasmussen's Special Interrogatories, Set Five

Defendant The Walt Disney Company's Objections and Responses to Plaintiff Rasmussen's Special Interrogatories, Set Six

Defendant The Walt Disney Company's Supplemental Objections and Responses to Plaintiff Rasmussen's Special Interrogatories, Set Six

## **Materials Relied Upon in Report**

First Joint Request for an Informal Discovery Conference (Re: Requests for Production Set 16), February 27, 2023

Second Joint Request for an Informal Discovery Conference (Regarding Requests for Production of Documents, Set 15), February 28, 2023.

Third Joint Request for an Informal Discovery Conference (RE: PMQ Deposition Notices), February 28, 2023

Joint Status Conference Statement, March 13, 2023

Deposition of Kara Anderson, Transcript, December 20, 2022

Deposition of NaShawn Bacon. Transcript, January 24, 2023

Deposition of Janet Bundrick Burnley, Transcript, January 27, 2023

Deposition of Gina Cordero, Transcript, March 23, 2023

Deposition of Ibelka Fernandez, Transcript, January 18, 2023

Deposition of Mark Larson, Transcript, February 22-23, 2023

Deposition of Julie Nagao, Transcript, April 18, 2023

Deposition of Janet Pate, Transcript, April 19, 2023

Deposition of Janet Temple, Transcript, February 7, 2023

Deposition of Kaitlyn Watkins, Transcript, April 27, 2023

DISNEY-000004100

DISNEY-000004103

DISNEY-000004119

DISNEY-000005262

DISNEY-000005461-DISNEY-000005474

DISNEY-000005526-DISNEY-000005551

DISNEY-000005671-DISNEY-000005715

DISNEY-000005778-DISNEY-000005783

DISNEY-000005784-DISNEY-000005789

DISNEY-000005790-DISNEY-000005810

DISNEY-000021916-DISNEY-000021928

DISNEY-000021948-DISNEY-000021950

DISNEY-000022028-DISNEY-000022032

DISNEY-000022372-DISNEY-000022382

DISNEY-000022827-DISNEY-000022858

DISNEY-000022887-DISNEY-000022903

DISNEY-000022959

DISNEY-000023357-DISNEY-000023368

DISNEY-000023512

DISNEY-000023513-DISNEY-000023524

DISNEY-000023525-DISNEY-000023530

DISNEY-000023531-DISNEY-000023627

DISNEY-000024275-DISNEY-000024280

DISNEY-000024281-DISNEY-000024284

DISNEY-000024285-DISNEY-000024290  
DISNEY-000024291-DISNEY-000024296  
DISNEY-000024311-DISNEY-000024316  
DISNEY-000024607-DISNEY-000024618  
DISNEY-000029162-DISNEY-000029178  
DISNEY-000029196-DISNEY-000029197  
DISNEY-000031074-DISNEY-000031117  
DISNEY-000031217-DISNEY-000031241  
DISNEY-000031267-DISNEY-000031305  
DISNEY-000031317-DISNEY-000031320  
DISNEY-000031321  
DISNEY-000031352  
DISNEY-000031403-DISNEY-000031427  
DISNEY-000031478  
DISNEY-000031484-DISNEY-000031527  
DISNEY-000031566-DISNEY-000031613  
DISNEY-000031614-DISNEY-000031652  
DISNEY-000031699-DISNEY-000031701  
DISNEY-000031966-DISNEY-000031967  
DISNEY-000032288-DISNEY-000032297  
DISNEY-000032389  
DISNEY-000032426  
DISNEY-000032448-DISNEY-000032458  
DISNEY-000032863-DISNEY-000032877  
DISNEY-000032926-DISNEY-000032926.0001  
DISNEY-000032927-DISNEY-000032983  
DISNEY-000032988-DISNEY-000033044  
DISNEY-000033111-DISNEY-000033125  
DISNEY-000033160-DISNEY-000033173  
DISNEY-000033338  
DISNEY-000033988-DISNEY-00033989  
DISNEY-000035418  
DISNEY-000035470-DISNEY-000035470.0001  
DISNEY-000035478-DISNEY-000035528  
DISNEY-000035559-DISNEY-000035566  
DISNEY-000035620-DISNEY-000035622DISNEY-000038536  
DISNEY-000038538  
DISNEY-000038539  
DISNEY-000038540  
DISNEY-000038541  
DISNEY-000038544  
DISNEY-000038546  
DISNEY-000038547  
DISNEY-000038548  
DISNEY-000038549  
DISNEY-000038631

DISNEY-000038642  
DISNEY-000038736  
DISNEY-000038831  
DISNEY-000038941-DISNEY-000038986  
DISNEY-000038987-DISNEY-000038988  
DISNEY-000038989-DISNEY-000038998  
DISNEY-000038999-DISNEY-000039008  
DISNEY-000039009-DISNEY-000039025  
DISNEY-000039026-DISNEY-000039036  
DISNEY-000039037-DISNEY-000039050  
DISNEY-000039052  
DISNEY-000039053-DISNEY-000039064  
DISNEY-000032900-DISNEY000039215  
DISNEY-000040994-DISNEY-000040999.001  
DISNEY-000041005-DISNEY-000041017  
DISNEY-000041018-DISNEY-000041028  
DISNEY-000041029-DISNEY-000041035  
DISNEY-000041051-DISNEY-000041056  
DISNEY-000041082  
DISNEY-000041090-DISNEY-000041099  
DISNEY-000041100  
DISNEY-000041108-DISNEY-000041118  
DISNEY-000041182-DISNEY-000041191  
DISNEY-000041195-DISNEY-000041235  
DISNEY-000041288-DISNEY-000041289  
DISNEY-000041298-DISNEY-000041303  
DISNEY-000041387  
DISNEY-000041675-DISNEY-000041679  
DISNEY-000041950-DISNEY-000041951  
Defendant’s Supplemental and Amended Response to Plaintiffs’ Special Interrogatories, Set Two , No. 19  
Defendant’s Supplemental Objections and Responses to Plaintiffs’ Special Interrogatories, Set Six, No. 53.  
Ex. 787 to the Dep. of Dimitrios “Jim” Lygopoulos  
Ex. 788 to the Dep. of Dimitrios “Jim” Lygopoulos  
Ex. 849 to the Dep. of Janet Pate  
Ex. 852 to the Dep. of Janet Pate  
Disney Website, last accessed 6/23/23

## **Appendix C**

### **Dr. Hough Expert Witness Work that Included Under-Oath Testimony**

## ***Dr. Hough Expert Witness Work that Included Under Oath Testimony***

- Case: *Cara Williams, et al., v. Wells Fargo, N.A.*
  - Expert witness for plaintiff.
  - Included expert witness report and deposition.
  - Provided opinion regarding employment practices used in implementing Section 19 of the FDIA (terminations resulting from failing a background investigation).
  - Provided opinion regarding “alternative” practices.
  - EEO discrimination; minorities.
  - Time period: mid 2010s.
  
- Case: *Bruce Smith, et al. v. City of Boston*
  - Expert witness for plaintiff.
  - Included expert witness report, deposition, and testimony in court.
  - Provided opinion regarding “alternative” tests – their validity, adverse impact, and availability.
  - Police promotion.
  - EEO discrimination; minorities.
  - Time period: mid 2010s.
  
- *United States v. Jacksonville Fire & Rescue Department, Jacksonville, FL.*
  - Expert for the U.S. Department of Justice.
  - Included writing expert witness reports and depositions.
  - Promotion to Firefighter Engineer, Lieutenant, Captain, and District Chief positions.
  - EEO discrimination case, African Americans.
  - Time period: mid 2010s.
  
- *Nancy Lykkehoy v. General Mills, Inc. [CONFIDENTIAL]*
  - Arbitration case.
  - Expert witness for claimant.
  - Included writing expert witness reports and testifying at hearing.
  - Provided opinion about age discrimination regarding General Mills, Inc.’s reduction- in-force termination decision of Lykkehoy.
  - Time period: 2018.
  
- *Michael Allard v. General Mills, Inc. [CONFIDENTIAL]*
  - Arbitration case.
  - Expert witness for claimant.
  - Included writing expert witness reports and testifying at hearing.

- Provided opinion about age discrimination regarding General Mills, Inc.'s reduction- in-force termination decision of Allard.
- Time period: 2018.
- *David Kirk v. General Mills, Inc.* [CONFIDENTIAL]
  - Arbitration case.
  - Expert witness for claimant.
  - Included writing expert witness reports and testifying at hearing.
  - Provided opinion about age discrimination regarding General Mills, Inc.'s reduction- in-force termination decision of Kirk.
  - Time period: 2018.
- *Michael Murray v. General Mills, Inc.* [CONFIDENTIAL]
  - Arbitration case.
  - Expert witness for claimant.
  - Included writing expert witness reports and testifying at hearing.
  - Provided opinion about age discrimination regarding General Mills, Inc.'s reduction- in-force termination decision of Murray.
  - Time period: 2018.
- *Denise Holtz v. General Mills, Inc.* [CONFIDENTIAL]
  - Arbitration case.
  - Expert witness for claimant.
  - Included writing expert witness reports and testifying at hearing.
  - Provided opinion about age discrimination regarding General Mills, Inc.'s reduction-in-force termination decision of Holtz.
  - Time period: 2018.
- *Peggy Maxe v. General Mills, Inc.* [CONFIDENTIAL]
  - Arbitration case.
  - Expert witness for claimant.
  - Included writing expert witness reports and testifying at hearing.
  - Provided opinion about age discrimination regarding General Mills, Inc.'s reduction- in-force termination decision of Maxe.
  - Time period: 2018.
- *Judge Moises Penalver (NYC Region of SSA) v. Social Security Administration (SSA)* [Office of Disability Adjudication and Review (ODAR)]
  - Arbitration case.
  - Expert witness for Association of Administrative Law Judges (AALJ).
  - Included testifying at hearing.

- Provided opinion regarding methodology and results of a work analysis study designed to determine the amount of time required to adjudicate adult disability cases in accordance with Social Security Administration (SSA) guidance and guidelines about legally-sufficient decisions.
- Time Period: mid to late 2010s.
  
- *Judge Kathleen Harrington (New Haven Region of SSA) v. Social Security Administration (SSA)* [Office of Disability Adjudication and Review (ODAR)]
  - Arbitration case.
  - Expert witness for Association of Administrative Law Judges (AALJ).
  - Included testifying at hearing.
  - Provided opinion regarding methodology and results of a work analysis study designed to determine the amount of time required to adjudicate adult disability cases in accordance with Social Security Administration (SSA) guidance and guidelines about legally-sufficient decisions.
  - Time Period: mid to late 2010s.
  
- *Judge Jerry Meade (Hunting, WV Region of SSA) v. Social Security Administration (SSA)* [Office of Disability Adjudication and Review (ODAR)]
  - Arbitration case.
  - Expert witness for Association of Administrative Law Judges (AALJ).
  - Included testifying at hearing.
  - Provided opinion regarding methodology and results of a work analysis study designed to determine the amount of time required to adjudicate adult disability cases in accordance with Social Security Administration (SSA) guidance and guidelines about legally-sufficient decisions.
  - Time Period: mid to late 2010s.
  
- *Judge Francis Hurley (Boston Region of SSA) v. Social Security Administration (SSA)* [Office of Disability Adjudication and Review (ODAR)]
  - Arbitration case.
  - Expert witness for Association of Administrative Law Judges (AALJ).
  - Included testifying at hearing.
  - Provided opinion regarding methodology and results of a work analysis study designed to determine the amount of time required to adjudicate adult disability cases in accordance with Social Security Administration (SSA) guidance and guidelines about legally-sufficient decisions.
  - Time Period: mid to late 2010s.
  
- *Judge Bryce Baird (Buffalo Region of SSA) v. Social Security Administration (SSA)* [Office of Disability Adjudication and Review (ODAR)]
  - Arbitration case.
  - Expert witness for Association of Administrative Law Judges (AALJ).

- Included testifying at hearing.
- Provided opinion regarding methodology and results of a work analysis study designed to determine the amount of time required to adjudicate adult disability cases in accordance with Social Security Administration (SSA) guidance and guidelines about legally-sufficient decisions.
- Time Period: mid to late 2010s.
  
- *Judge Bryce Baird (Buffalo Region of SSA) v. Social Security Administration (SSA)* [Office of Disability Adjudication and Review (ODAR)]
  - Arbitration case – different grievance than previous case (listed above). Expert witness for Association of Administrative Law Judges (AALJ). Included testifying at hearing.
  - Provided opinion regarding methodology and results of a work analysis study designed to determine the amount of time required to adjudicate adult disability cases in accordance with Social Security Administration (SSA) guidance and guidelines about legally-sufficient decisions.
  - Time Period: mid to late 2010s.
  
- *Judge Margaret Donaghy (Queens Region of SSA) v. Social Security Administration (SSA)* [Office of Disability Adjudication and Review (ODAR)]
  - Arbitration case.
  - Expert witness for Association of Administrative Law Judges (AALJ).
  - Included testifying at hearing.
  - Provided opinion regarding methodology and results of a work analysis study designed to determine the amount of time required to adjudicate adult disability cases in accordance with Social Security Administration (SSA) guidance and guidelines about legally-sufficient decisions.
  - Time Period: mid to late 2010s.
  
- *Case: Jewett et al. v. Oracle America, Inc.*
  - Expert witness for plaintiff.
  - Included expert witness report and deposition.
  - Provided opinion regarding work analysis, performance appraisal, compensation, HR management practices.
  - Gender pay equity, class action.
  - Time Period: on-going.
  
- *Case: Google v. Ellis, LLC.*
  - Expert witness for plaintiff.
  - Included expert witness report and deposition.
  - Provided opinion regarding work analysis and HR management practices, policies, guidelines, work products, documents, and materials that affect men and women’s compensation.

- Gender pay equity, class action.
- Time Period: early 2020s.
  
- Case: *Chen-Oster, et al. v. Goldman Sachs & Co.*
  - Expert witness for plaintiff.
  - Included expert witness reports and deposition to date. [Confidential]
  - Pay equity for women, class action.
  - Time period: Early 2010s to early 2020s.