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FOREIGN SERVICE JOURNAL

THE MAGAZINE FOR FOREIGN AFFAIRS PROFESSIONALS

A LEADERSHIP OPPORTUNITY

The Energy-Environment Convergence

FOREIGN SERVICE JOURNAL

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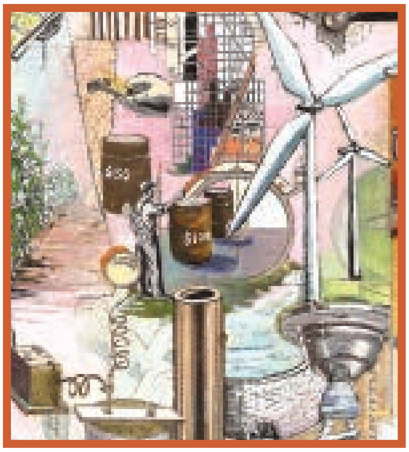

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The newest addition to the AFSA Web site.

Have an apartment to sublet; a house to sell; furniture to pass on? Coming soon and available exclusively to AFSA members are the all new **E-Classifieds**, at www.afsa.org/classifieds/. Members can post advertisements in a variety of categories similar to those in our print version of classifieds within the *AFSA News* section of the *Journal*.

The chief benefit of electronic ads will be the rapid turnaround time to reach the Foreign Service community and beyond. In lieu of posting a notice on the bulletin board in the Truman Building (we all know how convenient that is!), AFSA is offering this pilot classifieds program as a service to members. As an added bonus, the option to insert a picture will be available. The basic interface is designed to be concise, effective and, hopefully, user-friendly.

FOREIGN SERVICE JOURNAL

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President's Views

Self-Help

By John K. Naland

As you read this, AFSA expects to be working with Secretary of State Hillary Clinton and others in the Obama administration to secure expanded congressional funding for our foreign affairs agencies, to close the overseas pay gap, and to take other steps to strengthen U.S. diplomacy and development assistance.

However, some of what needs to be done depends not on the actions of others, but instead on self-help actions by individual Foreign Service members. Here I am reminded of the disaster victim who told a reporter: "I am tired of waiting for the government to clean up my front yard; I guess I will have to do it myself." Yes, I thought to myself, maybe you should clean up your own front yard!

My self-help checklist for active-duty members starts with professional development. Are you engaged in self-directed professional development by, for example, utilizing the Foreign Affairs Professional Reading List that was created last year in a joint initiative by AFSA and the under secretary of State for political affairs? Are you active in a professional development discussion group (book club) at your post or office, as recommended by that joint initiative?

What about training? Have you done a horizons-broadening developmental tour (such as a year of academic study or an out-of-agency detail assignment) or attained additional language fluency (such as proficiency in a second language)? Those two "electives" are among the five-out-of-seven benchmarks that State generalist officers must meet before promotion into the Senior Foreign Service under the Career Development Program adopted in 2005.

And what about professional writing? Military journals are full of provocative essays by active-duty officers analyzing professional issues. In contrast, relatively few career diplomats write articles for publication. To help fill this shortage of intellectual engagement, the *Foreign Service Journal* is always looking for submissions to its Speaking Out, FS Know-How and FS Heritage departments, as well as analytical pieces on international affairs and professional issues.

Do you practice constructive dissent? Since 1968, AFSA has presented awards to colleagues who demonstrate the professional courage and integrity to speak out using appropriate channels, ask tough questions, offer alternative solutions and give the best counsel that Foreign Service members are trained to give. This is a key duty for all of us, but in recent years AFSA has experienced a drop in award nominations, just as use of State's Dissent Channel has declined.

For overseas members whose positions involve reporting, outreach or program management, do you practice risk management — instead of risk avoidance — when it comes to venturing out from behind embassy or consulate walls? Are your days focused on interacting with host-country officials and citizens or on answering e-mails from Washington?

I have mentioned some of these points in previous columns. I repeat myself now because I continue to encounter influential policymakers and policy shapers in the executive branch, Congress and news media, at think-tanks, and among distinguished retired colleagues who say that the Foreign Service needs new attitudes in order to meet the challenges of 21st-century diplomacy and development assistance.

To be sure, I tell them that the first step is to give us the additional staffing and funding that a growing stack of blue ribbon panel reports say are desperately needed. But there is no question that some of what needs to be done depends on self-help actions within the Foreign Service.

Each of us needs to develop the knowledge, skills and abilities that make the Foreign Service uniquely able to contribute to foreign policy development and implementation. If we fall short, then future policymakers will look to others to get the job done. ■

John K. Naland is the president of the American Foreign Service Association.

LETTERS

What Else Could They Want?

I strongly agree with the November letter by Rick Polney regarding the State Department's new process for hiring Foreign Service officers. The Qualifications Evaluation Panel's decisionmaking process is mysterious indeed. It lacks transparency and has resulted in the rejection of highly qualified candidates.

Like Mr. Polney, my wife passed the Foreign Service written exam but was not invited to take the oral exam, even though she was a State Department intern overseas three times. A French major in college who also speaks Spanish, she has a master's degree in international relations from The George Washington University.

Upon graduating, she joined the State Department as a civil servant and served as the Armenia desk officer, a job normally held by an FSO. She was promoted rapidly to GS-13 in the Civil Service, and briefed a Cabinet member before his trip to Asia. She is currently working at one of our more difficult hardship posts, Havana.

Yet despite almost 10 years at the State Department, a relevant education for foreign affairs work, a proven ability to work at multiple diplomatic missions abroad including a hardship post, experience as a desk officer, and a passing mark on the written exam, she is told she is not qualified to take the orals?

When I asked the director general's office what she would have to do to qualify, the response was "We don't know" and "The board makes the decisions," as though no department official is responsible for the board's creation, operations or results.

Robert Ward
FSO
U.S. Interest Section
Havana

Communication and Dissent

One of the most persistent attributes of the Foreign Service is our apparent inability to speak meaningfully to the broader American public. This is puzzling given our professional commitment to, and real expertise in, communication with the world outside of the United States — that "Vast External Realm."

In fact, we have much to say and much to be proud of. The November and December issues of the *Journal* included the annual call for AFSA award nominations. The dissent awards program, now in its 40th year, is unique in the U.S. government — yet few know about it outside our own community.

When I described the program to military colleagues at the U.S. Pacific Command a few years ago, they were astonished, remarking that there was no chance such a program could exist among Defense Department employees or probably any other federal agency. The dissent program counters every cliché about "striped-pants diplomats" and deserves to be much better known.

To get this message out, I suggest that AFSA move the dissent award announcement from the *AFSA News* section of the *Journal* to the main section, and feature it on the cover with photos of the winners (as most American news magazines from *Time* to *People* do).

AFSA should also seek out "patrons" for the dissent program. If the incumbent Secretary of State is not interested, past secretaries might be. Even better might be the chairman and ranking member of the Senate Foreign Relations Committee. In any case, there must be prominent nonpartisan or bipartisan personalities who would be interested.

With these steps, it might be possible to obtain wider media coverage for a good human interest story. I urge the AFSA president and Governing Board to consider this proposal. My bet is that large numbers of AFSA members would approve of this approach.

Edward Marks
Ambassador, retired
Washington, D.C.

Change in Cuba?

In "America in the World: Mr. Magoo at the Helm" (*FSJ*, November), Chas W. Freeman Jr. says that the Bush administration's foreign policies have wreaked havoc on the global stage. Mr. Freeman's main point seems to be that such policies have left the United States isolated or excluded from the rest of the world at large. In quick succession he offers a glimpse region by region of what he sees as unwanted results of, in his opinion, ill-considered policies.

In connection with Latin America, Mr. Freeman mentions that U.S. policy toward Cuba is indicative of the administration's disinterest in the region and its "ideologically induced inability" to respond to opportunities. Specifically, he refers to supposed opportunities in a "changing Cuba." This is surprising and misleading.

Right after the revelation of Fidel Castro's serious illness more than two years ago, and the transfer to Raul Castro of the island's presidency, there was a surge in speculation about change in Cuba. The perception was that the new president would favor an economic opening that eventually would translate also into political liberalization. Events since then have contradicted such optimistic views.

One of Raul Castro's first decisions was the appointment of hard-core communist loyalists to positions of power. There has not been any economic opening of significance, and repression in Cuba continues to be as terrible as the country has suffered over 50 years. Changes have been cosmetic and basically meaningless.

This should not have come as a surprise. Raul Castro has always been a ruthless leader of Castroism in Cuba. He was associated from the start with extrajudicial executions and multiple purges in the country. He shares with his brother Fidel the view that ideological rigidity and the rejection of significant liberalization are essential conditions for the preservation of the Castro era — even after the Castros are gone.

Juan J. Buttari
FSO, retired
Fairfax, Va.

Remembering David Newsom

David Newsom has died, and his passing will trigger responses from a crowd of colleagues. Intimately involved at all levels of our expanding involvement in foreign affairs, he always was able to step back from a situation to gauge the national interest, as well as the practical steps that needed to be taken. His humane professionalism under pressure set him apart from the political, self-absorbed atmosphere of Washington, D.C. ■

Lee Dinsmore
FSO, retired
Elcho, Wis.

Correction

In the print version of the January Cybernotes, the contemporary and "50 Years Ago" quotes were transposed. We regret the error.

Send your letters to journal@afsa.org.

CYBERNOTES

AFSA's Dissent Awards Cited as Model in Kenya

"Time to Reward Constructive Disagreement" is the title of Kenyan columnist Laila Macharia's Dec. 17 offering in *Business Daily Africa*, the online version of the Nairobi-based *Business Daily* newspaper (**www.bdafrica.com**).

In a call for her government to institute an award for constructive dissent to complement the medals for patriotism traditionally awarded on Jamhuri Day, the anniversary of Kenya's establishment as a republic, Macharia cites the American Foreign Service Association — which recognizes "the officer whose actions best embody 'initiative, integrity, intellectual courage and constructive dissent.'"

"The point is to encourage members of the Foreign Service to challenge conventional wisdom," Macharia explains. "The idea is noble: a nation is better served when its constituents are encouraged to suggest improvements. But the best innovations may never see the light of day if we look askance at anyone who challenges the status quo."

"Despite the many liberation struggles we have been through, dissent is still frowned upon in Kenya," Macharia states, and proceeds to paint a devastating portrait of the culture of passivity and group-think. "We beg people to tell us what we think, to form our opinions for us, so that we don't have to take the trouble. And if we feel threatened by the missive, we promptly shoot the messenger, muzzling them or accusing them of ulterior motives."

"We can't move forward if we're always running back to the warmth of the hearth, afraid to take any risk," she says. "So let's cultivate a culture that admires and defends those who tell the truth and ask the hard questions," she urges.

"At the community and company levels, an Award for Constructive Dissent honors those who stand apart and lead from the front," Macharia concludes. "At the national level, it applauds those who love Kenya more than their own comfort. And who raise the alarm whenever they see millions of us headed resolutely toward the cliff's edge."

Public Diplomacy and the Pentagon

Observations concerning what some have termed the "militarization"

Site of the Month: www.GreenOptions.com

GreenOptions, produced by the Green Options Media Network, is a rapidly expanding network of environmentally focused blogs. Founded in February 2007 by David Anderson of San Francisco, it has become a leader among "green" news and information sources aimed at general audiences (www.greenoptions.com).

Written by experienced professionals and topic experts, *GreenOptions*' individual blogs engage visitors with authoritative content, compelling discussions and actionable advice. Users new to the "green life" can contribute to the conversation by joining in dialogue between the writers and visitors on individual blogs.

The 15 blogs are presented in three different "channels" — News and Opinion, Family & Lifestyle, and Business and Technology. One of the News and Opinion blogs, for example, *EcoWorldly*, presents news and perspectives on the environmental movement from around the world. Its writers report on green developments, environmental news and hot environmental issues from six continents, covering stories that seldom make the headlines in the mainstream media outlets but can provide ideas, lessons and a broad spectrum of information for making sustainable choices in the U.S. In the Business and Technology channel, *The Inspired Economist* highlights the individuals and companies applying passion and innovation to economic, social and environmental challenges.

GreenOptions also offers green job listings, a free online newsletter, discussion forums and a directory of green blogs and Web sites.

of foreign policy typically focus on the Defense Department's greatly increased role in nationbuilding and related foreign assistance efforts during the Bush administration. Recent news items suggest that the Pentagon's monopolization of information operations — or public diplomacy, broadly speaking — may be just as striking.

In a talk at the Washington Institute for Near East Policy in late October on "Building the Global Counterterrorism Network," Michael Vickers, assistant secretary of defense for special operations, low-intensity conflict and interdependent capabilities, discussed the Special Forces' information role in the fight against Islamist terrorists (**www.washingtoninstitute.org**). "The themes you emphasize, how well they resonate, the distribution mechanisms, who's giving the message" are all important factors, he said, and a notice posted by the Special Operations Command shortly thereafter indicated that the Pentagon is fielding its own version of the now-defunct U.S. Information Agency to get the job done.

As Walter Pincus reports in the Dec. 1 *Washington Post*, the notice for contractors updates a proposal to develop and operate "influence Web sites" that would support combat commanders in the war on terrorism. The Web sites, in local languages, would "shape the global media landscape" using Internet technologies, including "slideshows, video content syndication or podcasts, blogs, streaming video/audio and advanced search."

Pincus quotes from the notice to the effect that a minimum of two and no more than 12 Web sites will be needed, and that their languages might include Arabic, French, Portuguese, Armenian, Azeri, Farsi, Georgian, Hindi, Punjabi, Tagalog, Urdu, Russian and Chinese, in addition to English and Spanish.

The purpose of the sites is to present "news, sports, entertainment, economics, politics, cultural reports, business and similar items of interest to targeted readers" following "guidance provided by the appropriate combat commander," according to the proposal. Under its Trans-Regional Web Initiative, the Pentagon has such sites in North Africa and Iraq already, says Pincus.

The Special Operations programs are just one part of the Pentagon's global information operations, the policy for which was updated in August 2006 by Defense Department Directive O3600.01 with the objective of making them a core military competency (**http://www.fas.org/irp/doddir/dod/info_ops.pdf**). The Special Operations and Combatant Commanders' programs are separate from but coherent with the Defense Department's Public Affairs operations, the Civil-Military Operations' information activities and, last and perhaps least, the Defense Support to (State-led) Public Diplomacy program.

Crisis Erupts in Office of the Historian

The Office of the Historian was plunged into controversy in mid-December, when Professor William Roger Louis, chairman of the Historical Advisory Committee overseeing the office for the past five years, warned publicly that the future of the *Foreign Relations of the United States* series, the official record of U.S. foreign policy mandated by Congress and produced by the Office of the Historian, is in jeopardy due to mismanagement of the office by the incumbent Historian, Dr. Marc Susser. Underscoring his concerns, Louis announced his resignation from the committee.

Louis' views, presented in a letter to Secretary of State Condoleezza Rice, were echoed by Prof. Thomas Schwartz, another prominent historian and a former member of the Advisory Committee.

Schwartz, a professor at Vanderbilt University, pointed to the "forced retirement" this past summer of Dr. Edward Keefer, the series' editor, stating it was "only the latest example of a management style that insisted on abject and subservient loyalty to Dr. Susser at the expense of competence and performance in the achievement of the goals of the office."

Schwartz's membership on the Advisory Committee had not been renewed, in defiance of tradition, after he spelled out criticisms in the committee's last annual report. Another committee member, Prof. Edward Rhodes of Princeton University, also tendered his resignation in a Dec. 2 letter to Secretary Rice.

At a Dec. 10 meeting to address the problem, Assistant Secretary of State for Public Affairs Sean McCormack denounced the criticism. Accusing committee members of engaging in innuendo and ad hominem attacks, he walked out of the meeting.

At issue, among other things, is the departure of a number of qualified staff from the office — 20 percent of the FRUS staff (and 30 percent of its staff experience in terms of years of employment), according to Louis. The need to hire a competent new general editor for the series and catch up with the mandated publication schedule is also at issue.

Prof. Louis urged Sec. Rice to mandate an independent review of the

> If the prime minister of the Russian Federation is on television speaking about gas, it means gas is not an economic issue to them but a political issue.
>
> — Bodhan Sokolovsky, aide to Ukrainian President Viktor Yushchenko, Jan. 5, *www.washingtonpost.com*

leadership and management of the Historian's Office and to put a hold on all major actions of the Office pending the outcome.

According to a report on the fracas in the Jan. 12 *New Yorker* magazine, a concerned Sec. Rice herself met with the committee and subsequently appointed a review panel to look into the matter (**www.newyorker.com**).

Readers can pursue this unfolding story online at **www.fas.org/blog/secrecy/2008/12/crisis_in_frus.html**, where you will find links to most of the relevant documents.

Foggy Bottom Twitters, Networks, and Taps Online Youth Groups

"One clear lesson from the Cold War was that winning hearts and minds required communicating in a way that 'connected' with people on their terms, whether through film or jazz or jeans," wrote Deputy Assistant Secretary of State for Public Diplomacy Colleen P. Graffy in the Dec. 24 *Washington Post* (**www.washingtonpost.com**). To keep our public diplomacy relevant today, she continued, we have to reach out and connect with people on their terms, whether we use blogs, texts — or tweets.

Graffy's report on her use of tweets during a December PD trip through Eastern Europe, along with several related news items, indicates that the State Department's effort to adapt to the digital age continues to gather momentum.

Tweets, as Graffy explains, are the lingua franca of Twitter, a social networking tool in which you send a text message of 140 characters or fewer in response to the question: What are you doing?

Graffy linked her messages to video and photos, combining the personal (a reference to plunging into Iceland's Blue Lagoon) and the professional (interviews with Pro TV in Moldova and A1+ in Armenia to show U.S. support for free and independent media).

"Communicating in this peppy, informal medium helped personalize my visit and enhance my impact as a U.S. official," she said. Students at the University of Bucharest and, later, Moldovan bloggers knew her before she arrived. Said one Romanian student: "We feel like we already know you — you are not some intimidating government official. We feel comfortable talking with you."

Graffy points to State's introduction of "Public Diplomacy 2.0," social networking for State alumni and enhanced Web sites, blogs and Facebook pages for embassies. The department's blog, Dipnote, features musings from top officials on policies and programs.

On Dec. 1, the department officially unveiled a social networking site to promote international exchanges and enhance the U.S. image abroad, particularly among young people. *ExchangesConnect* is administered by the Bureau of Educational and Cultural Affairs (**www.govexec.com**). The newly designed Web site, **www.exhanges.state.gov**, is a portal to the social network and the agency's Facebook page.

The site's launch was accompanied by the announcement of a video contest aimed at boosting public diplomacy and sponsored by the Adobe Foundation. The theme for the three-minute video is "My Culture + Your Culture = Share Your Story." The bureau also plans to develop a program to offer free online English training and is seeking a private-sector partner to create the necessary technology.

In a potentially even more far-reaching initiative, the State Department has teamed with Facebook, Google, MTV, Howcast and others to organize an "Alliance of Youth Movements," with an online presence to inspire and assist youth groups around the world to combat political oppression and extremism.

The initiative, led by Under Secretary of State for Public Diplomacy James Glassman and Policy Planning staff member Jared Cohen, was inspired by an online campaign against terrorist guerrilla groups in Colombia: *Million Voices Against the FARC*, created by Oscar Morales, a 33-year-old unemployed computer technician (**www.facebook.com/pages/One-million-voices-against-FARC/10780185890**).

"The idea is to put all these people together, share best practices and produce a manual that will be accessible online and in print to any group that wants to build a youth empowerment organization to push back against violence and oppression around the world," Glassman said.

Some 17 groups from South Africa, Britain and the Middle East that already have an online presence, as well

50 Years Ago...

Americans are beginning to wake up to our dangerous language lag — a weak chink in the nation's armor. As a leader in the Free World, the United States cannot afford to continue to be tongue-tied in the world arena.

— From "Foreign Language: Chink in America's Armor?" by Jacob Ornstein, *FSJ*, February 1959.

as observers from seven organizations that do not, were in attendance at Columbia University Law School in New York City for the movement's launch in early December. Featuring Whoopi Goldberg, Facebook founder Dustin Moskowitz and Oscar Morales, among other speakers, the conference was streamed by Howcast (**http://info.howcast.com/youthmovements/summit**).

For more information, go to **www.state.gov/r/us/2008/112310.htm** for the transcript of the Nov. 24 briefing at the department, where Glassman and Cohen discuss the initiative in detail.

Another "First"

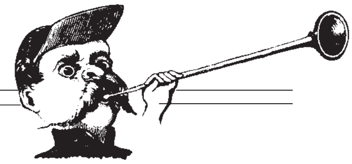
In celebrating the historic election of the first African-American president of the United States, another historic "first" has been neglected. Barack Obama is the first modern American president to have spent some of his formative years outside the United States. He is a Third Culture Kid, as Ruth van Reken, one of the foremost authorities on this phenomenon, points out in the Nov. 26 *Daily Beast* blog (**www.thedailybeast.com/blogs-and-stories/2008-11-26/obamas-third-culture-team**) — and this may exert a significant influence on his administration.

Obama is a TCK himself, and they proliferate among his top appointees. For example, White House adviser Valerie Jarrett was a child in Tehran and London; Treasury Secretary-designate Tim Geithner grew up in East Africa, India, Thailand, China and Japan as the son of a Ford Foundation executive; and National Security Adviser-designate James L. Jones was raised in Paris.

Not merely trivia, this could have a lot to do with the practice of the new administration, says van Reken. Children who spend a portion of their developmental years outside their "passport country" — and the adults they become — share a global perspective, social adaptability and intellectual flexibility. They tend to be quick to think outside the box and can appreciate and reconcile different points of view, according to the body of sociology and other literature on individuals raised globally. Beyond whatever diversity in background or appearance they may bring to the party, there is a diversity of thought among them as well.

In 1984, Dr. Ted Ward, then a sociologist at Michigan State University, hailed TCKs as "the prototype citizens of the future." The future is now! ■

This edition of Cybernotes was compiled by Senior Editor Susan Brady Maitra.



SPEAKING OUT

AFRICOM & SOUTHCOM: Reliquaria from an Earlier Age

BY DAVID PASSAGE

President Barack Obama faces many unenviable tasks, such as dealing with an imploding national and global economy and a crushing budget deficit. Nothing he can do with respect to the biggest non-entitlement spending — the wars in Iraq and Afghanistan — can significantly alter his financial and economic dilemmas.

And no pruning he might do can even begin to provide the resources needed to re-equip our armed forces with the hundreds of billions of dollars of materiel and munitions that have been expended in those current wars. Vehicles of all types are worn out; we are flying the wings off our aircraft and the rotors off our helicopters; and we are using much of our military equipment to within inches of its programmed life. And we have yet to calculate the ultimate costs of restoring the necessary capacity for other contingencies.

It should also be obvious that it would not be sensible for Pres. Obama to deal with this budgetary problem by telling his agency heads: "On the count of three, everyone take a deep breath and tighten your belt one notch." Instead, the new administration needs to seriously question the merits of axing whole programs — not merely shrinking each of them by 10 percent.

With respect to the Department of Defense, one of our biggest-ticket items, Pres. Obama could easily achieve significant savings by taking a hard look at restructuring our present geographic military command structure, with the explicit purpose of eliminating two major components: the U.S. Southern Command (responsible for Latin America and the Caribbean) and the newly established Africa Command.

> *Eliminating the Africa and Southern Commands would be a smart move, both for strategic and budgetary reasons.*

The point of departure should not be a review of whether these two commands can be justified — for that simply invites proponents to make the best case for keeping them. Rather, the question should be how to handle residual functions the U.S. might wish to retain (and there shouldn't be many) within a realigned geographic command structure that would consist of the European Command, Pacific Command, Central Command and a new Western Hemisphere Command. This would combine NORTHCOM's defense of the homeland with responsibility for limited military training, security cooperation and humanitarian assistance missions transferred to it from the former SOUTHCOM.

Similarly, our military training and humanitarian assistance programs in Africa could revert to subcommands within EUCOM and CENTCOM, where they have historically been situated — or be dealt with by a subcommand of WESTCOM. After all, if the U.S. Central Command (focused on the Middle East) can operate from MacDill Air Force Base in Tampa, Fla., there is no reason African security assistance functions can't be dealt with from the States as well.

EUCOM, PACOM and CENTCOM have clear, well-defined and unquestioned warfighting missions, as well as robust force structures to support them. AFRICOM and SOUTHCOM do not and should not.

Competing Rationales

Our newest geographic command, the Africa Command, assumed its responsibilities on Oct. 1, 2008. (Anyone interested in a detailed account of its establishment should read Ambassador Robert Gribbin's excellent article in the May 2008 *FSJ*: "Implementing AFRICOM: Tread Carefully.")

The new command was created partly because former Secretary of Defense Donald Rumsfeld wanted to refocus EUCOM exclusively on the North Atlantic Treaty Organization and the countries that emerged from the wreckage of the Warsaw Pact. The incoming national security adviser, retired General James Jones, the commander of EUCOM at the time, supported the move. Proponents also pointed out that the new command would be free to concentrate its efforts on assisting African governments strengthen civilian control over their armed forces.

An unarticulated further reason the military supported it was the creation of a new four-star billet with all the infrastructure that would require.

A second pressure for the creation of AFRICOM, which I remember well from my service in the Africa Bureau at State and as senior director for Africa on the NSC staff under President George H.W. Bush, was resentment within the Congressional Black Caucus that the U.S. "doesn't care enough about Africa" to give it what every other region of the world has: a dedicated military command.

Finally, a third impetus was the clearly decreasing ability of African governments to maintain law and order within their own borders, leading to growing anarchy and failed states, which could ultimately threaten U.S. vital national interests and those of its friends and allies. Problems in the Niger River delta, Darfur, the Horn of Africa, Central Africa and elsewhere fueled a growing consensus that Washington needs to do more to strengthen African governance and development — and may ultimately have to use military force to protect its national or humanitarian interests on that continent.

Meanwhile, the State Department failed to press Congress to consider better approaches for addressing the continent's needs — e.g., strengthening the U.S. Agency for International Development and providing it with adequate resources. Even with the huge drain on military resources in Iraq and Afghanistan, no one was willing to argue against creating the new command.

The primary executive agency for development work should always be USAID, not DOD.

Thus, AFRICOM was launched last year despite vociferous objections from many African countries, the much greater costs of using our military personnel for nationbuilding operations, and the obvious political and psychological drawbacks of tasking U.S. uniformed personnel with what should be civilian development activities.

Yes, there are enormous development needs in Africa; and yes, the U.S. has significantly neglected the continent (notwithstanding Assistant Secretary Jendayi Frazer's statements praising President George W. Bush's policies toward Africa). It is also true that our military can do almost anything and go almost anywhere. Nonetheless, the real question is whether such tasks should be done by U.S. military forces.

Does Washington really want to project a military face toward a continent that already suffers from a surfeit of them? Do we Americans believe economic development and internal security structures (e.g., civilian and civilian-led police forces) should be built along military lines by armed forces? And is that what we want Africans to think we believe? If so, shame on us! We do not permit our military to train our own police and law enforcement personnel and do economic development work in the U.S. Why do we believe this should be done by our military in Africa?

Past as Prologue

If one wants to see what AFRICOM could become, one has only to look at what SOUTHCOM has been. Mercifully, a lot of lessons have been drawn from that experience, which, one hopes, is therefore unlikely to be repeated.

During the first four decades of its existence, SOUTHCOM supported our national interest in preventing Soviet-sponsored takeovers in the Western Hemisphere, such as occurred in Eastern Europe following the defeat of Hitler's Germany. To be sure, the threat was real; we received a serious wake-up call in May 1948 when Soviet-backed insurgents briefly seized control in Colombia. The coup was undone within days, but fueled the conviction that Washington needed to strengthen Latin American militaries. "And the rest is history," as the saying goes.

Over the next three decades, U.S.-supported military regimes toppled elected civilian governments in virtually every country in Latin America — Argentina, Chile, Brazil, Paraguay, Bolivia, Peru, Ecuador, Colombia, Venezuela, Dominican Republic, Haiti, Panama, Nicaragua, El Salvador, Honduras and Guatemala — excepting only Mexico and Costa Rica.

And although U.S. policy began changing during the 1970s under President Jimmy Carter, our economic development assistance for Latin America actually declined during the 1980s, 1990s and the first decade of the 21st century. Instead, our military assistance grew, first under the guise of countering growing narcotics trafficking from Andean Ridge countries, and then — particularly after the 9/11 attacks — countering terrorism throughout the hemisphere.

In light of this history, here is the crucial question for President Obama's national security team: Is a military response the right way (let alone the best or most cost-efficient one) to counter the twin threats of terrorism and narcotrafficking in Latin America? For that is now the primary rationale for having a four-star military command with Latin America as its sole area of responsibility, notwithstanding laudable efforts by the current SOUTHCOM commander, Admiral James Stavridis, and his predecessor, General Bantz Craddock, to reshape SOUTHCOM's mission to include more interagency components and participation.

To see what AFRICOM could become, look at what SOUTHCOM has been.

The Development Conundrum

A principal deficiency suffered by virtually all developing countries, but particularly those in Africa and Latin America, is weak civil law enforcement institutions –- both the police and judicial branches. Police forces are, by and large, ill trained, poorly equipped, incompetently led and badly paid. The same can be said for the majority of judges and other law enforcement authorities. This is a prescription for corruption and abuse, so it should come as absolutely no surprise that that has been the result.

Washington's response, regrettably, has been to look for ways our military, acting through SOUTHCOM and now AFRICOM, can ameliorate or rectify these problems. But is that the right, let alone best, means to help our Latin American neighbors or African friends with these structural problems?

Although our armed forces boast terrific civil affairs personnel, that's not the face we should be seeking to portray to our neighbors, either in this hemisphere or in Africa. Instead, the primary executive agency for this sort of development work should always be USAID (as well as other organizations and agencies with experience in these fields).

President Obama and Defense Secretary Robert Gates need to wring every conceivable economy out of our defense structure to pay the bills for ongoing operations and re-equip our armed forces. This exigency offers a golden opportunity to review our existing geographic command structure in light of post–Cold War changes. SOUTHCOM is a relic from an earlier era the U.S. should wish to put behind it, while AFRICOM is the result of a manufactured need and never should have been created at all.

There is simply no need for a standalone four-star command in either Latin America or Africa to achieve U.S. national security goals. Either organization might be justifiable in a world of unconstrained resources, but neither the world they were created for nor the current and foreseeable U.S. resource capacity justifies them now.

Both entities should be eliminated as soon as possible, with their residual training and security assistance functions realigned within other commands or given to a new WESTCOM. ■

Retired Ambassador David Passage spent much of his Foreign Service career in politico-military affairs, including two details to DOD (for the CORDS program during the Vietnam War and as a political adviser to the U.S. Special Operations Command from 1993 to 1996), and has worked with all U.S. regional military commands. He also served in the bureaus of African and Latin American affairs at the State Department, was director for Africa on the National Security Council staff under President George H.W. Bush and was ambassador to Botswana from 1990 to 1993. He now lectures at military schools and training facilities and mentors military exercises. He is also a member of the AFSA Governing Board.

STRIKING WHILE THE IRON IS HOT

Josh Dorman

THE CONVERGENCE OF THE NEED FOR ECONOMIC STIMULUS PLANS, LOWER-CARBON ENERGY SOURCES AND INFRASTRUCTURE RENEWAL IS A HISTORIC MOMENT.

BY WILLIAM C. RAMSAY

As he takes the helm of the ship of state, President Barack Obama faces an energy agenda full of unprecedented challenges, all of which the ongoing financial meltdown has further complicated.

The presidential campaign was surprisingly limited on the topic of energy given the level of oil prices going into the conventions, topping out at $147.27 a barrel last July. Both candidates professed a commitment to achieving “U.S. energy independence” and reducing dependence on the “unstable” Middle East, and took more accommodating positions on drilling in environmentally sensitive areas. But Senator John McCain turned that issue over to his running mate, Alaska Governor Sarah Palin, who removed any ambiguity from the Republican Party's aggressive upstream stance on oil and gas with her slogan of "Drill, baby, drill!" The 47 percent of the electorate who voted for the Republican ticket cannot be ignored.

On the issue of constraining greenhouse gas emissions, both Senator Obama and Senator McCain took a position in favor of "cap and trade" (putting a limit on national carbon emissions and trading carbon emissions permits under that limit), signaling the likelihood of a significantly different U.S. approach to climate change policy than George W. Bush pursued. When oil prices were spiking last summer, both candidates broached the idea of using the Strategic Petroleum Reserve to stabilize the market, but advisers to both campaigns quashed such talk. In any case, unlike his opponent, Obama did not paint himself into any inescapable political corners on energy issues.

The Oil Price Roller Coaster

Pres. Obama's team will discover an energy market in sharp readjustment and under considerable stress. Oil prices fell by two-thirds from July to November 2008, both as an overdue reaction to sustained exaggerated prices and because of the sharp contraction in energy demand driven by the global economic slowdown. As of this writing in early January, the bottom of the economic adjustment has not been reached. Oil prices are now well below the marginal cost of new production in many areas, such as the Gulf of Mexico and Canadian tar sands.

William C. Ramsay, a Foreign Service officer from 1971 to 1998, served as ambassador to the Republic of the Congo (Brazzaville) from 1993 to 1996 and as deputy assistant secretary of State for energy, commodities and agriculture trade from 1989 to 1993 and again from 1996 to 1998 (when his portfolio included foreign policy sanctions instead of agricultural trade). After leaving the Foreign Service, he was deputy executive director of the International Energy Agency for a decade. In 2008 he was named a senior fellow and director of the energy program at the Institut Francais de Relations Internationales.

Disturbing signals are already coming from the supply and demand ends of the energy spectrum.

This price adjustment has many implications. Consumers with cars and homes have gotten immediate relief at the gas pump or when filling their home heating-oil tanks. Falling energy prices will eventually feed through the economy in the form of lower prices for manufactured goods.

For more economically fragile consumers (two-thirds of humanity), lower energy-input prices for fertilizers, insecticides and transport should reduce food costs. In addition, the crushing weight of subsidies around the world, measured at $310 billion in 2007 by the International Energy Agency, will be eased, freeing up resources for health, education and transport infrastructure.

Those oil-producing countries who had the wisdom to direct the past years of windfalls into sovereign wealth funds will not feel as dramatic a budget shock as will less cautious governments. Many producers resisted the temptation of higher prices and continued to budget for oil prices below $50 a barrel in their annual revenue assumptions, while others need prices to stay above that mark to meet spending commitments. Countries whose spending expanded to the limits of the windfall will experience considerable difficulty in getting back to living within their means. Some of their leaders may find their ability to placate their citizens' inflated expectations severely hampered.

In the marketplace, investors in upstream oil and gas will need to evaluate whether oil at $50/barrel is transient — and, if so, whether it will return to the $60-to-$80/barrel range or drop further. Their conclusion will affect the volume and pace of investment, which will, in turn, determine whether there will be enough oil and gas when demand picks up. (There is no real doubt that global demand will eventually resume its long-term growth pattern — only when, and how much lower will it go first?) The IEA is already warning that by 2010 or 2011, we could see the onset of another cycle of tight supply and high prices because of insufficient investment now.

Disturbing signals are already coming from both ends of the energy spectrum. In Saudi Arabia, Aramco has slowed the pace of development of incremental production from Manifa, currently 900,000 barrels a day. And in the offshore North Sea, the United Kingdom company Centrica is reviewing the pace at which the 180-megawatt Lynn and Inner Dowsing wind farm is being built.

On the demand side, the elevated prices of this past summer have clearly caused some behavioral shifts that will only partially fade with lower prices. Much of the discussion of assistance to the U.S. auto sector assumes an evolution toward a more environmentally sensitive product line, now that $4/gallon gas has gotten U.S. consumers' attention. Lost value throughout the markets, industrial restructuring and the lasting effects of recession will all permanently erode some portion of demand, as well.

Any credible gaming of a sustainable energy path begins with a substantial dose of efficiency, so that is the first place to look.

Crisis or Opportunity?

Because any credible gaming of a sustainable energy path begins with a substantial dose of efficiency, that is the first place to look. The new administration may be able to capitalize on the reaction of consumers to the higher prices of mid-2008 by building on the precautionary behavior they have adopted during the recession. Both consumers and legislators are likely to be supportive of more aggressive policy on improving efficiency, including real tightening of Corporate Average Fuel Economy standards. Auto companies seeking support from Washington may be less inclined to resist such obligations, while their champions in Congress may recognize the long-delayed opportunity to shift strategies.

Other systemic or market imperfections that mute or block efficiency signals to consumers are well known and can be overcome by new policies affecting housing and commercial buildings, given this moment of political opportunity. Ideas abound to make major energy efficiency gains, but the will to implement them has been weak. Still, most energy consumption scenarios projected through 2050 suggest that the 40 percent of carbon savings needed to attain a sustainable energy path can be provided by cost-effective or negative cost-efficiency sources.

One low-carbon option that may find new support in this environment is nuclear power, which appears on track for a renaissance. Even in the early 1980s, the world was able to build 25 reactors a year. Given the much greater interest in nuclear power in key emerging countries, it is not inconceivable that the 30 to 35 reactors a year important for a sustainable future could be added, as more of the population comes to accept that option as a part of the solution to climate change.

Still, major obstacles remain before China and India, for instance, can incorporate large blocks of nuclear power into their grids. These include: the ability of relatively small power grids to accept such large increments; the absence of the necessary security, technical and regulatory bodies; and, perhaps most often overlooked, the inability of the rate base to pay the kilowatt-hour price for nuclear power all stand in the way. In addition, nuclear power has heavy up-front capital costs.

China's power-generating nuclear plants, each providing 8.3 gigawatts of electrical energy, produced just 2.3 percent of the country's electricity in 2007. However, the Chinese National Reform and Development Commission has announced plans to build 40 more nuclear GWe-generators by 2020 and 160 by 2030. For its part, India is about to launch a new phase of nuclear development, but its institutions and markets are not well prepared for large-scale deployment of that technology.

Decarbonizing in the Long Term

Achieving greater energy efficiency and decarbonizing the power sector are both essential first steps, but the longer-term path to lower-carbon fuels is much more challenging. Politicians are quick to support renewable energies and put their hope in hydrogen and biofuels, but the obstacles to widespread adoption of these technologies are real. Renewables are generating public resistance; current biofuels have aggravated food prices; and hydrogen fuels are probably decades away. A great deal has been learned about how to integrate intermittent wind and solar electricity into power grids, but substantial investments are needed to create smart and well-integrated grids that can satisfy our need for security of electricity supply.

Fortunately, new renewable sources of energy (e.g., non-hydroelectric and nontraditional biomass) hold great promise for the future if we take the right steps now. The International Energy Agency estimates that renewable sources of energy could provide as much as 50 percent of power generation in 2050 — but not without unprecedented and smart governmental support. Major research, development and demonstration programs, much more aggressive deployment strategies and an increasing value for carbon will all be necessary.

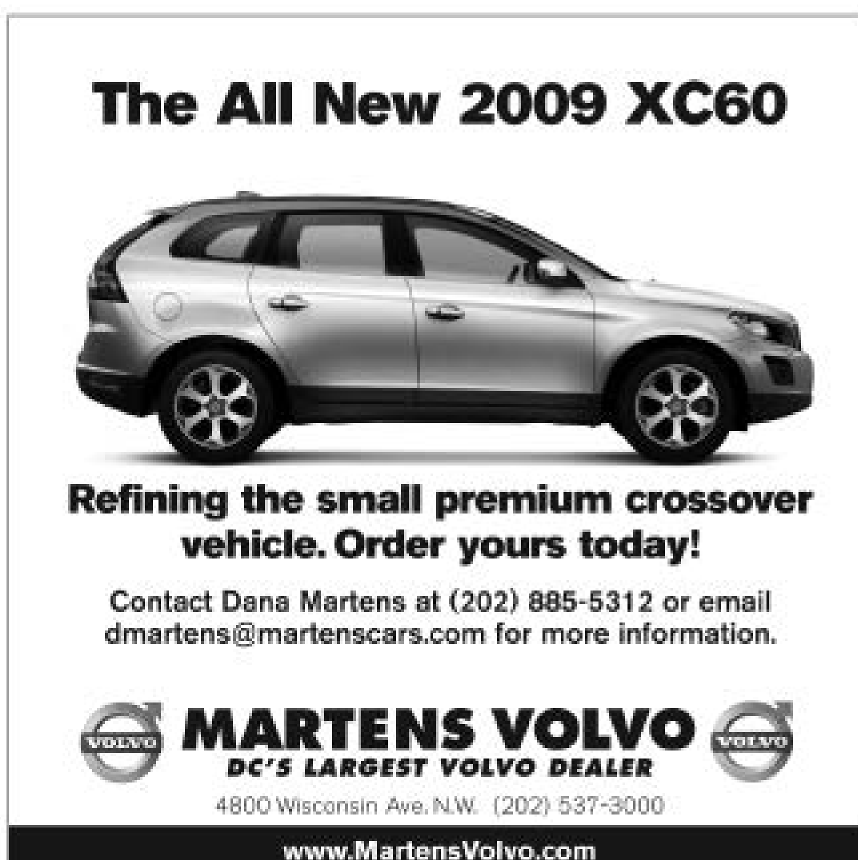
Essential to decarbonizing the power sector, carbon capture and storage would permit the world to be able to continue using today's fastest-growing fossil fuel — coal, whose production grows at 2 percent per year. Because both India and China plan to rely on this domestically available fuel, the majority of incremental carbon between now and 2050 will be generated by coal combustion in those two countries — unless we do something about it. Leaders have called for an aggressive carbon capture and storage demonstration effort encompassing more than 20 full-scale plants. Yet we are nowhere near that target, with only two or three plants currently under construction.

The entire world needs to be engaged in meeting the twin challenges of energy security and sustainability.

In parallel with development of technologies for carbon capture and storage, consumers, politicians and journalists need to be reassured that CO_2 can safely be stored in geologic or marine environments. This issue has the potential to raise concerns comparable to those blocking programs in radioactive waste storage, yet a serious effort to educate the public has not begun.

Longer-term, more esoteric renewable sources and energy vectors, such as hydrogen or second-generation biofuels, need a great deal of work and conceivably a much higher price of carbon to make their deployment economically feasible. There is also the risk that if the rollout is not done properly, consumers' first experience with biofuels and their collision with food will chill enthusiasm for more sustainable varieties.

Consumers have been surprised to find that biofuels



based on certain food crops have aggravated the price pressure on food and caused other undesirable shifts in cropland use. But rejecting this approach would be a mistake, for cellulose-based biofuels could add substantially to a diversified energy mix, with manageable implications for the environment and alternative land use.

Aggravating the impediments to bringing on more exotic forms of energy in a timely way is the fact that government-funded research, development and demonstration programs to promote lower-carbon energy sources have been in free fall internationally since 1983. Then, such programs accounted for 11 percent of total government spending on research, development and demonstration. Now, the figure is just 3 percent — and overall government spending on RD&D has collapsed.

Beijing and New Delhi are acutely aware that they will be losers in any climate change scenario, from desertification, disease migration, agricultural stress and accelerated urbanization.

Leapfrogging Technologies in the Developing World

Some of the technology eggs in our basket will never hatch without greater government support. And technology transfer is at the core of motivating developing countries to make a greater formal commitment to addressing the climate change challenge.

As things stand, developing countries know that they have not created today's problem of CO_2 accumulations. Two of the largest emerging economies, India and China, have together contributed less than 10 percent of the world's carbon dioxide emissions since 1900. So they have no intention of taking on responsibility for cleaning up that mess.

On the other hand, both governments are acutely aware that they will be losers in any climate change scenario, from desertification, disease migration, agricultural stress and accelerated urbanization. As these countries become more affluent and electrify, transportation and power-generation solutions become more important. In the first instance, every decision India and China make on a new power-generation unit has ramifications that will last 60 to 70 years. And because most of the time the decision will be to build a new, coal-fired power plant, our first priority has to be promoting their choice of advanced coal-combustion technology.

This final point is all the more important when one realizes that, according to the IEA's 2008 World Energy Outlook reference scenario, the world outside the Organization for Economic Cooperation and Development will account for 87 percent of incremental energy demand between now and 2030. In that same timeframe, two-thirds of the $26 trillion investment in the world's supply of energy and power required to meet that demand must be spent in non-OECD countries — where 97 percent of incremental CO_2 emissions originate. (China, India and the Middle East alone account for 75 percent of that total.)

The story these numbers tell is that the entire world needs to be engaged in meeting the twin challenges of energy security and sustainability. Accordingly, the global community already expects a great deal of help from the Obama administration and is waiting to see whether the industrialized world is prepared to lead by setting the example.

The December 2009 meeting in Copenhagen of the Climate Change Conference represents an important opportunity to chart a course forward in this regard. The recently concluded Poznan negotiations reaffirmed the strong commitments of participating governments to negotiate a follow-on mechanism to the Kyoto Protocol that terminates in 2012. While the newly elected Obama team was represented in Poznan, we will not know until after Jan. 20 how the new administration will translate campaign rhetoric into reality.

With $147.27/barrel oil still a recent nightmare, and the existence of a real threat that it might return sooner rather than later, now is the time for the Obama administration to strike while the iron is hot. The world is waiting for American leadership on climate change. The convergence of the need for economic stimulus with the need for aggressive funding for lower-carbon energy and energy infrastructure renewal provides a unique window of opportunity for the new administration. Lower oil prices will soon cool the iron and close that window. ■

CAPITALIZING ON A STRATEGIC OPPORTUNITY

BY TAKING THE LEAD TO ADDRESS CLIMATE CHANGE, THE U.S. CAN SHIFT GLOBAL ECONOMIC AND ENVIRONMENTAL DYNAMICS.

BY SARAH LADISLAW

Over the last several years the global energy landscape has changed. For the first time in history, new demand for energy coming from developing countries has surpassed demand growth in the developed world. New supplies of energy are harder to access and develop due to increasing demand, tighter state control over resource development, the increased cost of basic materials, price volatility and frozen capital markets. Conventional energy resources like oil and natural gas come from a handful of energy-producing regions located outside the developed world. The United States is no longer the only major energy consumer in terms of overall size or growth potential. Energy markets are being shaped by new producers, shifting consumer priorities and innovative ways of doing business.

With few major exceptions, the countries with the largest demand growth are not the ones with vast energy supplies. As a consequence, increased energy trade and massive new investment is necessary to produce and deliver energy to the people who need it. Despite the high-price environment of the last several years and the market's extreme volatility of late, it does not appear that adequate investment is taking place to meet future demand.

All of this leads to greater anxiety over the security and affordability of future energy supplies. To make matters worse, the latest science indicates that current patterns of energy production and use are irrevocably changing the global environment and threatening the sustainability of vital natural resources. The strategic imperative to transform the current energy system goes far beyond the traditional concerns.

The challenges surrounding our collective energy future are linked to our economic and environmental well-being, as well as our national security. Absent a major strategic shift in policy, U.S. influence in global markets

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will continue to erode, as new global players and emerging trends shape the energy system going forward.

The urgent need to address climate change presents a strategic opportunity for the United States to shift global energy priorities in favor of low-carbon alternatives and, in so doing, to fundamentally alter the world's geopolitical, economic and environmental dynamics.

The pillars of a new U.S. energy and climate strategy should include strong domestic leadership on climate and energy policy and a grand bargain with major emitters.

Our Current Path

Over the next couple of decades the world's population is projected to grow from six to eight billion people, and standards of living are likely to increase in densely populated areas of the world. Societies will require greater resources (water, food, land, energy and other basic materials) to fuel and sustain this economic and population growth. As the world struggles to meet these energy needs, new trends and dynamics will be at work.

According to the most recent projections by the International Energy Agency, global energy demand will increase by approximately 45 percent by 2030, with nearly 87 percent of that growth coming from developing economies — 51 percent from China and India alone. In fact, energy demand from developing economies (i.e., nonmembers of the Organization for Economic Cooperation and Development) has now overtaken energy consumption in the developed world for the first time. Going forward, supplies are projected to come from approximately the same sources (mainly fossil fuels) and the same major resource holders as they do today. While the recent economic downturn raises doubts that demand will achieve projected levels of growth, the underlying factors driving it are likely to persist.

The world is not running out of energy, but it is becoming more difficult to gain access to, produce and convert the world's energy resources and deliver them to the people who need them. Many of the remaining conventional oil and natural gas reserves are located in a handful of countries in the Middle East and Eurasia, while the Western Hemisphere is rich in unconventional fuels such as oil sands, oil shale, extra-heavy oil deposits and unconventional natural gas resources.

The adequacy and security of the delivery infrastructure required to transport larger volumes of oil and gas resources over increasingly long distances and through already crowded transit points will also remain a major concern. In the coming years, energy trade flows will be affected by a concentration of supply and demand centers that are not geographically proximate. Already coal, biomass and other resources are being transported longer distances to reach foreign markets.

Geopolitical trends continue to have a strong impact on energy production and trade. For instance, the high-price environment of the last several years resulted in a resurgence of resource nationalism and greater state control over the resource base. While sovereign nations have always guarded their resources, the revision of legal and regulatory structures has created an atmosphere of investment uncertainty. This, along with higher costs for basic materials, has delayed investment.

Other factors, such as the changing role of geopolitical alliances in forming energy deals; poor governance and political instability; threats to facilities, infrastructure and transit areas; and a greater focus on human rights, environmental degradation, poverty alleviation and energy equity issues, have all emerged as elements of the changing geopolitical landscape. As a result of these factors, governments have become increasingly concerned about their immediate and long-term energy security.

At the same time, the world has grown more cognizant of the enormously damaging effect that the production and use of fossil fuels is having on the natural environment. A major contributor of anthropogenic greenhouse gas emissions into the atmosphere, fossil fuels are a key factor in global warming. Scientists state with increasing levels of certainty that atmospheric concentrations of these gases must be stabilized in order to avoid the most dangerous effects of climate change. Thus, a key component of national policy must be to slow, stop and reverse the growth in greenhouse gas emissions from human activity, chief among them the carbon dioxide emitted by the burning of fossil fuels. The world relies on that source for nearly 85 percent of its energy needs, and that share is not projected to change significantly, absent a serious and sustained effort to shift the underlying energy system.

Although it is too soon to know the scope and duration of the current financial crisis and subsequent economic downturn, the most direct impact thus far has been a driving down of demand and prices. Low prices affect the development of energy supplies (fossil fuels as well as renewables) and the shortage of capital delays projects. For technology-sensitive advancement, the financial crisis has (at least temporarily) dried up access to funding sources. Reduced revenue streams to conventional oil producers as a consequence of lower prices may make them rethink nationalistic policies in order to attract new investment dollars and investors.

With respect to the effect on the climate, reduced energy demand may slow emissions growth, but not anywhere near the levels needed. Lower prices undermine and delay technology investments and switching to alternatives, but they may also reduce the cost of building new clean-energy infrastructure as prices for steel, labor and infrastructure also decline. Despite the uncertain long-term impact of the current economic crisis, most analysts agree that the underlying trends of the last several years will persist.

In any case, it is already clear that our current path is unsustainable. Transitioning away from the current system, however, will require massive investments, significant technological advancement, major changes in government policy and commercial activity, changes in public behavior, significant amounts of basic materials and human capital and unprecedented global cooperation. A transformation of this magnitude normally unfolds over many decades. But the reality is that these changes must take place over a much shorter timeframe and at a potentially sizable cost to society. Despite the daunting nature of this challenge, the right strategic approach can also yield significant economic and political gains.

A Strategic Opportunity

The United States is an important and influential part of the global energy market. It is by far the largest consumer, accounting for 23 percent of global energy consumption. Currently, the United States accounts for 25 percent of annual world liquids consumption, 20 percent of world coal consumption and 22 percent of global natural gas consumption. At the same time, the U.S. is also an important supplier of energy. It is the third-largest producer of oil, second-largest producer of natural gas and the largest producer of ethanol (closely followed by Brazil), and has the world's largest coal reserves.

Despite this important role, the U.S. is increasingly disadvantaged by the emerging energy trends of the last several years, and our influence over how other countries act in the face of these trends is diminishing. Leverage is being redistributed to major resource holders, the companies representing them and major new consumers. In many ways, these new players are not beholden to the market-based principles that the United States and many other traditional consumer countries have put forth as a global model for energy production, trade and use.

Moreover, many of the factors that underpin our energy security, contribute to global stability and give us influence to shape global energy activity are no longer as effective. Domestic production of oil and natural gas is flat or declining, and the resources that are available are more carbon-intensive. Spare capacity is not as abundant relative to global demand as it once was. International oil companies face increasing obstacles to investment. Western notions of free-market systems are increasingly under attack. And many of the post–World War II institutions designed to deal with global multilateral issues reflect the interests of the world as it once was, not those of today's major new players.

Given the increasingly tenuous outlook for global energy markets and our standing within those markets, the best strategic option for the United States is to try and take a leading role to influence the rules governing the way ahead.

This strategy is not without risks or cost, nor will it be easy to execute. The emergence of a carbon-constrained world can bring about economic opportunity and job creation for some, but it will also increase the cost of energy and, as is true of any major economic transition, cause some degree of dislocation. Despite the widespread rhetoric about a green recovery program, it is far from clear that the American public and U.S. policymakers are willing to make the sacrifices and changes that will be required to address these challenges.

Climate change can be an opportunity to breathe new life into outdated views on trade, agriculture and foreign policy — or it could exacerbate those issues and create new levels of complexity (for difficult issues like agricultural subsidies, border tariff adjustments and geopolitics). Constructively engaging the rest of the world on climate change policy could be an opportunity for global leadership — or it could be an issue that divides Americans and separates U.S. views from a global consensus.

Absent a major strategic shift in policy, U.S. influence in global energy markets will continue to erode.

Neither our energy nor our climate problems can be solved over the next four or even eight years. In many ways, the challenge for President Barack Obama's administration is to set the tone for a new approach to energy production and use for years to come, by starting a new conversation with the American public and global allies and aggressively, yet carefully, pursuing several key elements that will begin the transition to a secure, low-carbon future.

The pillars of a new U.S. energy and climate strategy should include strong domestic leadership on climate and energy policy and a grand bargain with major emitters. The strategy should capitalize on new economic opportunities and pursue productive engagement with the international community.

Key Elements of a New Approach

Domestic Policy on Energy and Climate. Strong domestic leadership on climate and energy policy starts at home. Domestic policies should seek to balance the economic, security and environmental consequences of energy production and use. In addition, given the wide-ranging effects that energy and climate policy will have on other policy areas (e.g., agriculture, trade, foreign policy, security, economics, etc.), it is important to consider the complex linkages, potential trade-offs and likely unintended consequences of these domestic policies.

Energy Policy. In times of economic hardship and limited capital, it is imperative that the federal government prioritize its energy policy actions, make wise investments and catalyze private-sector spending. In the near term, actions with the potential to create jobs, strengthen markets for low-carbon energy technologies and address multiple energy challenges, while yielding near-term gains, should be at the top of the list. Some of the obvious choices are to eliminate barriers and provide incentives for greater efficiency gains in all sectors; reset the system of incentives (tax breaks, standards, regulations, etc.) for low-carbon energy sources; and modernize and expand the electricity grid to provide greater reliability to consumers while enabling more aggressive demand-side management programs and an increased capacity for renewables.

Climate Policy. U.S. domestic climate policy must simultaneously address mitigation of greenhouse gas emissions while making a long-term substantive commitment to climate science and, where necessary, adapting to the unavoidable repercussions of climate changes. Domestic mitigation policies should establish a clear, straightforward and transparent framework with long-term as well as incremental goals, and ensure compatibility with state-level programs already under way in order to reduce uncertainty for businesses. Emissions reduction policies should be applied equitably among sectors of the economy, avoid disproportionate economic disruptions and allow adequate time for capital turnover.

The most important, yet difficult to implement, part of this strategy is to put an economy-wide price on carbon. Establishing a price for carbon (along with having the proper regulatory environment) will increase the competitiveness of low-carbon energy solutions and encourage greater energy efficiency to spur the transition to a low-carbon economy.

A Grand Bargain with Major Emitters. Strong U.S. domestic policy designed to limit greenhouse gas emissions is essential but not sufficient for achieving global climate goals. Other major emitting economies must also contribute to the solution. The United States should seek a grand bargain with major emitting countries to reduce emissions. This bargain should include a long-term emissions reduction goal and interim mandatory emissions reduction targets for each country.

It is especially important to ensure the participation of China, which is estimated to have overtaken the United States as the largest global emitter of carbon dioxide. Recognizing developing countries' concerns over burden-sharing and their continued ability to develop economically, a global climate agreement should include common but differentiated targets for developed and developing countries.

One approach would be to use a "climate on-ramp," allowing rapidly developing countries to gradually adopt sector-based targets in their heaviest-emitting sectors of the economy, with an eventual switch to economy-wide emissions reduction targets. Such a grand bargain could include agreements to liberalize trade in clean-energy goods and services, and assist with technology deployment in developing countries. Rapidly emerging developing countries are not in favor of this approach, but it remains to be seen what new negotiating positions will emerge over the next year.

Create Economic Opportunity. One of the major challenges for political acceptance of global action on climate change is the threat of economic damage from increasing the cost of energy. While the economic analysis of proposed cap-and-trade legislation includes a wide range of projected negative economic effects, the *Stern Review on the Economics of Climate Change* and other studies indicate that over the long term, the cost of inaction outweighs the cost of near-term action to combat climate change.

There is no doubt that a carbon-constrained world will produce both winners and losers. Therefore it is essential that the United States position itself to take full advantage of the economic opportunity of a low-carbon world. Effectively meeting emissions goals will require new technologies and a highly skilled work force. Estimates suggest the market for low-carbon technologies could reach $47 trillion by 2050. This market, in turn, is expected to create jobs and new opportunities for innovation. U.S. energy competitiveness policy should include massive and effective technology research, development and deployment, and a system of incentives to encourage efficiency and reward low-carbon behavior for companies and consumers.

Educating the American work force and future generations to compete in the global marketplace is an issue that cuts across all sectors of the U.S. economy. Our nation's success at remaining a technology leader depends on our ability to attract new students to math, engineering and other technologically oriented curricula and to increase our work force's familiarity with those disciplines. In conjunction with those efforts, Washington should embark on a public education campaign to improve domestic understanding of these challenges.

Engage the International Community. Productive engagement with the international community on energy issues requires earnest participation in climate change negotiations and a move beyond the often-misinterpreted rhetoric of "energy independence." Smart and effective U.S. leadership on these issues requires knowing our limitations. Washington should engage in cooperation and lead by example in areas of comparative advantage, learning to rely on global institutions and allies to carry out activities not directly related to U.S. strategic interests.

According to the most recent projections by the International Energy Agency, global energy demand will increase by approximately 45 percent by 2030.

Our government's participation is essential to a lasting global framework for reducing greenhouse gas emissions and developing adaptation strategies to help the whole world cope with the inevitable disruptions caused by climate change. As the largest economy in the world, the United States is uniquely positioned to set the pace and direction of this effort, both through its participation and its ability to persuade other major economies (current and future) to cooperate with us.

The climate change challenge offers the United States an opportunity to provide leadership in the creation of flexible, yet durable, norms and institutions — in much the same way the U.S. did for global trade regimes and regional security coalitions in the 20th century. Action on this requires a long-term policy view balanced with short-term initiatives — one that enables global markets to function properly and fosters sustainable economic development. Through this effort we can reinforce core principles even as we attempt to resolve the inherent inequities and monumental challenges of global climate change solutions. ■

Improving the PRT-Military Professional Relationship

A U.S. Army member of an Iraq Provincial Reconstruction Team offers practical advice to Foreign Service colleagues.

By Sean P. Walsh

After what seemed like weeks, we members of the Diyala Provincial Reconstruction Team and the ground-holding battalion had finally gotten all of the pieces together to begin renovating the Diyala Vocational School. Ron Bonfillio, a State Department employee, and Lt. Colonel Ted Daley, a U.S. Army Reserve officer assigned to the PRT, had jointly decided on the site and had coordinated with officials in Baghdad and Baqubah to gain approval for the school.

As my unit's civil-military plans officer, I was the one who gained us access to the giant checkbooks of the Commander's Emergency Response Program and the Iraqi-funded I-CERP. We had even recruited a field artillery lieutenant fresh out of West Point with a mechanical engineering degree to bring some sorely needed practical knowledge to the process that we liberal arts types were missing.

So I had a genuine sense of hope that I had felt very few times during my 15 months in Iraq: this project would be different. It would be done quickly and efficiently and would be sustained by the government of Iraq. Most importantly, it would get the Sons of Iraq, the groups of mostly Sunni men that helped provide security and whose rejection of al-Qaida was so essential to recent success in Iraq, out of the business of standing on a street corner on the American taxpayers' dime and into sustainable, long-term employment. These new, real jobs would hopefully prevent them from returning to militias and the insurgency.

It wasn't easy, however. The project planning had taken significant coordination between the PRT and the military unit responsible for the area, a process involving head-butting, gnashing of teeth and, to be honest, some hurt feelings on all sides. Speaking as a military officer recently redeployed from Iraq who frequently works with personnel from PRTs and the embedded PRTs that are assigned to support military units directly, I can clearly see that the culture clash between members of the armed forces and State Department employees has a definite impact on the quality of work done by both organizations.

Let me acknowledge that the military is far from blameless for the fact that our two organizations occasionally have a less than stellar working relationship. In fact, I would like to see a Foreign Service member of a Provincial Reconstruction Team submit a similar article to a military journal such as *Parameters* in order to offer his or her insights on the situation. But in this article I want to provide some suggestions, from my perspective, for future Foreign Service PRT personnel on how that professional relationship can be improved.

Captain Sean P. Walsh deployed to Iraq from August 2007 to October 2008 as an infantry officer with the 2nd Stryker Cavalry Regiment. After serving as a rifle platoon leader in the Dora neighborhood of Baghdad, Capt. Walsh was assigned as his battalion's civil-military plans officer and worked extensively with matters related to economic development, reconstruction and capacity-building in both Baghdad and Baqubah and supervised a Commander's Emergency Response Program budget of over $15 million. A 2005 graduate of the United States Military Academy, he is now a student at the Maneuver Captains' Career Course in Fort Knox, Ky., and is also a master's degree candidate at Virginia Tech. The views presented here are entirely his own and do not represent those of the Department of Defense or the U.S. Army.

First, let me say that I have the utmost respect for the Department of State, in general, and Foreign Service officers in particular. I interned at the U.S. embassy in Singapore when I was an undergraduate, and it was one of the most rewarding professional experiences of my life.

I also know how hard it is to become an FSO. I once took a Foreign Service Written Exam practice test and did not do well (knowledge about American choreographers is apparently a prerequisite for success on the exam).

Know Who Runs the Show

The most important thing to understand in improving the relationship between PRTs and their uniformed colleagues is that Provincial Reconstruction Team members live and work in a military-dominated environment. Whatever your personal feelings are about how State Department employees should be utilized in conflict zones like Iraq and Afghanistan, the reality is that the military runs the show.

PRTs are almost totally dependent on the military for security and movement to attend meetings outside the forward operating bases. The military also has the easiest access to CERP, probably one of the biggest foreign aid vehicles ever created. And I won't try to downplay the fact that some military personnel view civilians as "weenies," as Shawn Dorman reported in her March 2007 *Foreign Service Journal* article ("Iraq PRTs: Pins on a Map").

The best way to overcome these biases is to quickly establish a professional working relationship with your military counterparts. Toward that end, I urge Foreign Service PRT members, and especially team leaders, to conduct an introductory meeting with the subordinate commanders in your area as soon as possible when beginning your tour or when a new unit arrives. As a PRT member, you will frequently meet with brigade staff and the brigade commander (a full colonel), but it will be the units on the ground, battalions and companies, that support your daily movements, obtain funds for larger projects and generally facilitate your efforts. So it is important to gain the support of battalion and company commanders to help with your mission.

I have seen firsthand the success that our two organizations can achieve together when our relationship and areas of responsibility are clearly defined.

When you meet with these officers, explain what you contribute to the mission in your area and what you can bring to the table (or "to the fight" in Pentagon-speak). As FSO Chuck Hunter pointed out in Ms. Dorman's article, diplomats have much longer-term views of development and success than the military. If you cannot articulate the PRT's role in the short term (12 months or less), that commander may simply see you as a burden, a tasking that takes away from the "real" mission.

I would add that, especially for ePRT members, you might also consider how your goals can be adjusted to ensure that they are nested with the priorities of the military side of the house. Though we should all be working from the same page, often this isn't the case.

For instance, if a commander feels that solving water problems is the key to bringing stability back to his or her area, I would recommend that you help address that problem even if you feel that something else should be the priority. As Kiki Munshi, a former FSO and PRT leader, has pointed out, "If the military thinks it can do something we believe won't work or doesn't think what we want to do is important, we're up a tree." I feel that it is better to at least be working toward a goal together than to be "up a tree" and unable to accomplish anything.

Respect Protocol

Another key element to understand about the military is that, as an organization, it is extremely touchy about protocol. This goes well beyond the saluting and rank usage that I'm sure you are all well aware of, descending into an almost tribal structure that can be inscrutable to an outsider.

Where you as a PRT member will most likely encounter this is in arranging for transportation to your meetings and site visits. Because Provincial Reconstruction Teams exist outside the chain of command of the units that support you, some within the military consider it a professional insult for a PRT to "task" them with a mission such as movement to a meeting.

In order to deal with this bias, the team leader must work out the details of this relationship so that the military understands its role and team members aren't reduced to "bumming" rides. Team members also need to know how to properly address grievances when they feel they aren't being adequately supported.

Failure to clarify this relationship will result in significant friction between military units and the PRT, forcing team members to ask for support outside of proper channels and procedures. Units get tasked to support missions through very specific channels that, while they change slightly from unit to unit, usually result in a daily or weekly order. Though I understand that meeting times frequently change and opportunities can come up quickly, I strongly encourage PRT members to utilize these channels as much as possible and submit requests as far in advance as possible.

In cases where an unexpected meeting or opportunity does arise too soon for the orders process to take place, going directly to a subordinate unit can be a touchy technique. If you and the battalion and company commanders that support you have a good working relationship, and they are made aware of how that meeting or opportunity will help them accomplish their mission, then picking up a phone or walking over to a battalion headquarters to ask for help directly should not be an issue. On the other hand, if a professional relationship is not already present and these commanders don't understand the importance of what you are trying to accomplish, a request that uses unofficial channels is not likely to be looked upon favorably.

The techniques I suggested earlier — holding formal introductory meetings, explaining your goals in shorter timelines and nesting your priorities with those of the commanders that support you — can go a long way to establishing the necessary relationship that will allow you to occasionally take advantage of unofficial channels.

Learn Military Speak

Foreign Service officers need to take the time to read up on military terms and acronyms before coming to Iraq or Afghanistan. The military's constant use of jargon makes it almost a language unto itself, and the fact that each unit seems to have its own slang and unofficial acronyms only complicates the situation.

I recommend that you pick up a copy of Barbara Schading's *A Civilian's Guide to the Military* (Fraser Direct, 2007), which provides an excellent, concise overview of the various branches of the military, its rank structure and some useful protocol. I gave it to my fiancée after our engagment, and she found that the stream of acronyms and professional terms that constitute work-related conversations with my fellow military officers became significantly clearer after she read it. Let me hasten to add that she is no slouch when it comes to national security. But just as a physicist might not be able to follow everything a zoologist writes about, Foreign Service personnel are not trained to use the professional terms of the military (nor the other way around).

Finally, while it is a technical issue, another major obstacle to an efficient and productive relationship with the military is the fact that many PRT members do not have access to the Defense Department's Secret Internet Protocol Router computer network.

Almost all reporting and e-mail coordination in a deployed unit is conducted via the SIPR, so if PRT members lack reliable access to this network, fewer people will be able to read their reports or benefit from their assessments. If your team does not have the SIPR or there are consistent problems with access, I would encourage you to make this one of your top priorities when seeking assistance from the embassy. You may also be able to request technical support from the military units with which you are colocated.

I hope this advice serves some of you well as you prepare to work alongside your military partners in Iraq and Afghanistan. I have seen firsthand the success that our two organizations can achieve together when our relationship and areas of responsibility are clearly defined, and hope that success will continue in the future. ■

FS Heritage
The Courageous Diplomacy of Ebenezer D. Bassett

The heroism, integrity and concern for human rights of the first African-American diplomat to serve as a U.S. chief of mission set a powerful example.

By Christopher J. Teal

Nov. 16, 2008, marked the 100th anniversary of the death of Ebenezer D. Bassett. Unfortunately, almost no one in the Foreign Service has even heard that name, much less knows of his importance. But when President Ulysses S. Grant appointed him head of the American diplomatic mission in Haiti in 1869, it was more than a matter of patronage. Bassett's appointment broke the racial barrier, making him the first black to hold the position of chief of mission for the United States. And his courage and integrity paved the way for generations of future African-American members of the U.S. diplomatic corps, culminating in the appointments of Colin Powell and Condoleezza Rice as Secretaries of State.

Bassett's rise from obscurity as an educator and the grandchild of a slave to become the first black man to head a U.S. mission was implausible given the racial turmoil of the 19th century. But Bassett was no ordinary man. His parents were free blacks in Connecticut and leaders of their community who ensured that their son received the finest education possible. In something almost unheard of in the mid-1800s even for white students, Ebenezer Bassett attended college in his home state. He became the first black student to integrate the Connecticut Normal School in 1853, more than a century before the Supreme Court held in *Brown v Board of Education* that segregation in public schools was illegal.

Christopher Teal, a Foreign Service officer since 1999, is currently the public affairs officer in Guadalajara. Previous assignments include Lima, Santo Domingo and Washington, D.C. His biography of Bassett, titled Hero of Hispaniola, *was published by Praeger Books in 2008 and can be found at http://www.greenwood.com/catalog/C35195.aspx.*

Building upon his love of learning, Bassett became a teacher at, and later principal of, the Institute of Colored Youth in Philadelphia. During the Civil War, he helped the great abolitionist Frederick Douglass recruit black soldiers for the Union Army. This activism paid off when General U.S. Grant won the White House in 1868 and looked to reward his political supporters in the black community.

Bassett's nomination to become minister resident to Haiti (the title "ambassador" would not be used in American diplomatic service until 1893) made him one of the highest-ranking black members of the U.S. government. His accreditation to the "Black Republic" was no accident either. Though Haiti had gained its independence from France in 1804, it was not officially recognized by the United States until 1862. Southern resistance to a former slave colony becoming a nation had kept rightful recognition at bay. But with the Union's victory, it was time to take the next step: elevating the level of bilateral relations with the symbolic appointment of Bassett.

A Delicate Touch

Upon arriving in Port-au-Prince in 1869, however, Bassett found that his new home was also rent by civil war. The 36-year-old diplomat with no international experience was nonetheless one of the most powerful figures in the country. Though he soon realized that much of the work of diplomacy involved intangibles, he also understood that his duties were "not so onerous as delicate," as he wrote to his friend Frederick Douglass. "Common sense and some little knowledge of law … will carry me through," he added optimistically.

It would certainly require more than common sense to navigate the treacherous waters of the Haitian war, however. Telegraphs could not yet instantly transmit messages to every corner of the globe, so messages passed between Washington and embassies the old-fashioned way: via handwritten letters. And because of this, two things were of utmost importance — accuracy in reporting and good handwriting. Bassett possessed both of these attributes, and his memos back to Washington displayed a quick grasp of the unfolding political situation on the island. Given the amount of time it required for Washington to receive this reporting, however, Bassett knew he would be forced to act first and ask for forgiveness later.

Given the amount of time it required for Washington to receive his reporting, Bassett knew he would be forced to act first and ask for forgiveness later.

His first challenge came as the government of Sylvain Salnave began to crumble under the pressure of the rebellion by General Jean Nicholas Nissage Saget. As the situation deteriorated, Bassett felt compelled to call for help and pleaded with Secretary of State Hamilton Fish for a warship: "Please send one immediately and keep it constantly here."

It was a cry he repeated numerous times throughout that year. But with Washington turning a deaf ear to his appeals, he worked out an arrangement with the French and British legations, both of whom oversaw numerous warships in the harbor of Port-au-Prince. If American interests required assistance, Bassett had to personally convince them to provide support. The diplomat also leased a new office for the legation, located in a fireproof building to prevent the destruction of irreplaceable records in the event of the much-rumored looting and burning of the city. All of this he did without any guidance from his capital.

As the battles continued, hundreds of refugees filled his residential compound in the hills overlooking the city and errant shells landed on his grounds. Meanwhile, the Department of State had sent instructions denying Bassett authority to accept political refugees. Though accepting refugees was a practice commonly used by the European powers on the island, Secretary Fish found it had no basis in law. Bassett was in a quandary: should he protect the women and children huddled in his residence or strictly obey a State Department circular? As Saget's forces finally overwhelmed the remnants of the old regime, Bassett went to negotiate for the safe passage of those seeking asylum.

But Saget was reluctant, demanding a list of refugees so that he could determine which might actually be political enemies. Bassett refused, boldly telling him: "You will pardon me for reminding [you] that the holding of women and children as hostages is repugnant to modern civilization and especially to the government of the United States." He went on to warn the Haitian rebel leader that if he harbored any hopes of good bilateral relations, he should simply allow the release of the refugees.

Saget finally gave in, and with little regard for his own safety — and despite a tropical fever — the American minister personally escorted the throng of refugees into the heart of the capital soon after sunset so that they might return to their homes. Other captured political opponents did not fare as well as Bassett's group. Many were quickly killed by having their throats slit.

During his eight years in Port-au-Prince, Bassett would deal with several similar incidents, as Saget faced a coup from General Michel Domingue, who in turn faced a coup from General Boisrand Canal. In all cases, the defeated side invariably rushed to seek help from foreign legations, and the American legation most prominently. Bassett also handled U.S.-citizen commercial claims, enforced diplomatic immunity for his consular and commercial agents, and endured hurricanes, fires and numerous tropical diseases.

His Finest Hour

The case that posed the greatest challenge to Bassett, however, was that of political refugee General Boisrand Canal. The general was another of the young leaders who had successfully ousted Salnave from power. By the time of the subsequent Domingue regime in the mid-1870s, he had retired to his home outside the capital. The new Haitian president, however, brutally hunted down any perceived threat, including Canal.

The knock on Bassett's door that came at 3 a.m. on May 3, 1875, shattered the illusion of any settlement of this lat-

Bassett's student photograph, c. 1855, Connecticut Normal School, Central Connecticut State University.

est uprising. As the proud Canal and his two young relatives staggered into the American's home and sought protection, Bassett's best instincts took over. Knowing that Domingue's army was probably just steps behind the weary, terrified men, he shut the door behind them, and invoked the delicate veil of protection that diplomatic immunity offered.

After seeing to it that his new guests were given food, water, medical care and clothing, Bassett must have sat with his head in his hands thinking of how he would explain this to a displeased Sec. Fish. "It may be that the instinct for humanity got the better of me," he wrote. "The men before me were not my personal friends. They had never visited my house before, nor I theirs. I had no merely personal interest in them," he noted days later in a letter to the department.

As the minister resident began making discreet inquiries the next day, he learned that massive arrests were taking place throughout the city. Martial law was now in effect, and people were fleeing in every direction to stay alive. Calling on the palace, Bassett found emotions were raw. During the afternoon, the city's district attorney, a close friend, warned Bassett that he should return home at once.

Panicked, he fled and found hundreds of armed men outside his gates. More troops were on the way, and it was clear that the worst-kept secret in Haiti was at an end. Assured that everyone inside was safe, he returned to file a formal protest with the foreign minister, who replied demanding to know the name of every refugee. Bassett politely refused and left, but he soon began to receive threats of violence against himself and his family. Despite further efforts by the diplomat to calm emotions, the threats intensified.

The crisis dragged on for several days before Bassett was able to pen his first memo back to Washington. Reflecting on all that was still unfolding, Bassett handwrote a 21-page despatch to Washington. The envoy remained optimistic that passions would eventually cool, having dealt with numerous cases of refugees in the past. Still, things seemed different this time around. "I must confess," he wrote to Sec. Fish, "that the presence of a thousand armed men around my country residence … with discontent stamped on their faces and Henry rifles in their hands, does not quite give the best possible ground to my hope."

Not once asking about his minister's well-being or offering any words of support, Fish responded by berating Bassett. He noted that the Haitian ambassador in Washington, Stephan Preston, had been complaining about the refugees.

Fish wanted simply to be rid of this problem as quickly as possible. However, he did not force his envoy to just hand over the refugees; to do so would be a capitulation to the Haitian demand, and American prestige required more.

In his reply, despite incurring the wrath of his superiors in Washington, Bassett put all of his credibility on the line:

"I am not unaware that the ground taken in my several despatches … may not be in accord with the requirements of public law … but circumstances seemed to crowd in upon me without warning, and in such a way as to leave me almost no choice. Men maddened by passion, inflamed, *Bassett's performance during his eight years in Port-au-Prince places him in the annals of great American diplomats.*

as I am credibly informed, by rum, and elated by consciousness of armed power, were pursuing their fellow countrymen with red-handed violence. To have closed my door upon the men pursued would have been for me to deny them their last chance of escape from being brutally put to death before my eyes."

The Standoff Continues

It was not simply a matter of humanity that led Bassett to throw the protective cloak over his asylees. He was also keenly aware that to give even one inch in this staring match would invite a rampaging mob to overrun his home and all the consulates under the American flag throughout Haiti.

Throughout the standoff, Bassett's home remained surrounded by more than a thousand soldiers. The nightly rhythm of loud taunts and screams, the beating of metal objects and the general air of danger kept his family huddled inside trying to gain a few hours of restless sleep.

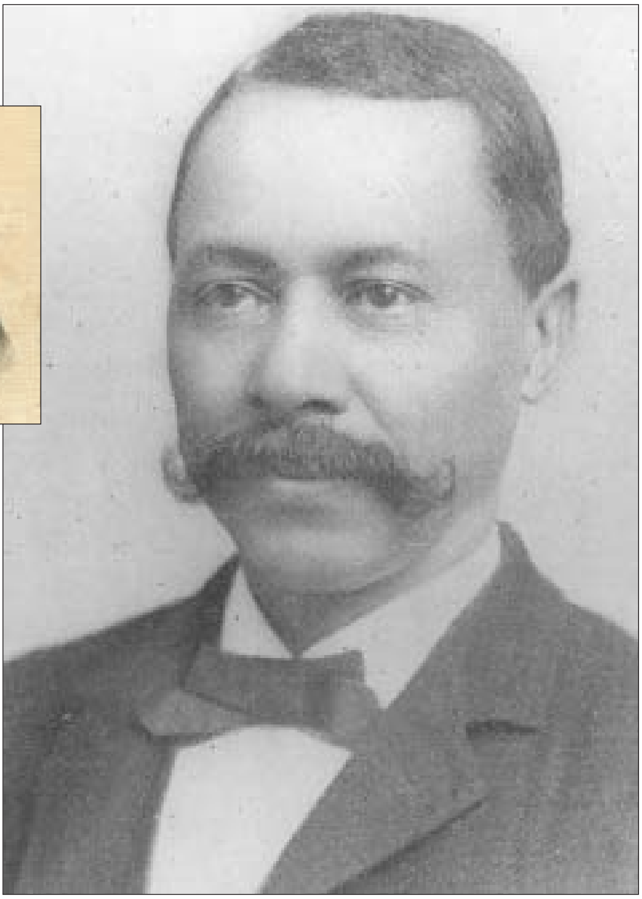
Bassett first raised the idea of sending a U.S. warship to Haiti in a May 8, 1875, despatch. He argued that a show of force would exert "a wholesome influence" and strengthen "our own moral force" in resolving the matter.

As the conflict dragged on for weeks, with both Bassett and Domingue digging in their heels, Washington remained paralyzed. The diplomat continued to plead for a warship through the summer. But Fish's pique at his minister and his continued dithering discussions with Haitian Ambassador Preston, who lobbied hard against sending a ship, left the situation in a quagmire.

As weeks became months, Haitian authorities continued to turn up the pressure. Domingue issued a decree ordering any citizen to shoot Canal down on sight. Then he arranged for hasty military tribunals to try the general for treason. Bassett took note of these efforts as a means to sway Hamilton Fish into ordering Canal's release. Calling the trials a "farce," Bassett begged his superior "to concede to this government nothing whatever further than what is already conceded."

In spite of the displeasure it caused in both capitals, Bassett's heroic stance had won him supporters among the Haitian people. The whole affair had turned popular opinion in favor of the United States and made Canal a folk hero. "The prevailing sentiment is unmistakably in favor of [Canal], and in our favor, because we have firmly protected him against violence," Bassett wrote. No doubt part of that support for both men was because of the brutality with which the regime continued to act against any and all presumed opponents. Still, political arrests and killings continued, and Bassett concluded, "the awful fact stares me in the face that we are all under a reign of terror."

By summer's end, it looked like even Sec. Fish had finally had enough. Perhaps a more visible threat, he concluded, would cause the Domingue regime to crack. "It has been determined to apply to the Navy Department to order a man-of-war to



Inset: "Ebenezer D. Bassett, Colored Minister to Hayti." from Harper's Weekly, *May 1, 1869. Right: an undated photo, Temple University Library.*

Port-au-Prince with a view to your protection from insult," Fish wrote to Bassett. "That the embarrassing question adverted to may be satisfactorily adjusted before she arrives, is much to be desired."

In fact, just as the ship was preparing to leave, Amb. Preston rushed in to tell Fish that Domingue was ready to capitulate. Bassett could escort Canal safely out, if only the warship would turn back and not enter Haitian waters. Fish agreed and instructed Bassett that a deal had been set. Though Bassett had made that same request repeatedly for months, he took it as a welcome relief when he received the news.

Finally, just after midnight on Oct. 5, 1875, after five months as a refugee inside the Bassett home, Canal embraced him. The general then boarded an American-flagged ship, which set sail for Jamaica and his safety. The next day the American diplomat informed the State Department that the crisis had finally passed: "Refugees [were] amicably embarked and soldiers withdrawn from around my premises yesterday."

By demanding humane treatment for an honorable Haitian citizen, Bassett served not only the best interests of the United States, but also those of the people of Haiti.

After Haiti

At the end of the Grant administration in 1877, Bassett submitted his resignation as was the custom. In spite of any lingering resentment that may have existed in Washington because of his defiant stance, it was impossible for the department not to recognize Bassett's work.

Acting Secretary of State F.W. Seward wrote to Bassett, thanking him for his years of service:

"I cannot allow this opportunity to pass without expressing to you the ap-

Ebenezer Bassett paved the way for Colin Powell and Condoleezza Rice to serve as Secretaries of State.

preciation of the department for the very satisfactory manner in which you have discharged your duties of the mission at Port-au-Prince during your term of office. This commendation of your services is the more especially merited because at various times your duties have been of such a delicate nature as to have required the exercise of much tact and discretion."

When Bassett returned to the United States, he spent a decade in New York City as Haiti's consul general. He then returned to Philadelphia, where his daughter Charlotte taught at the Institute of Colored Youth. He spent the rest of his life there.

Unfortunately, unlike his peers who broke the color barrier in other professional fields, Ebenezer Bassett would be forgotten with the passing of time.

Yet he was a role model, and not simply for his symbolic importance as the first African-American diplomat. His concern for human rights and courage in the face of threats from Haitians as well as opposition from his own government place him in the annals of great American diplomats.

For those of us in the current Foreign Service, his leadership helped establish the great tradition in which we now work, and his name is one we all should know. ■

Appreciation
Passage of a Global Nomad

Norma M. McCaig, 1945 – 2008

By Mikkela Thompson

Norma M. McCaig, creator of the phrase "global nomad" and founder of Global Nomads International, died on Nov. 10 at her home in Reston, Va., after four years with bone cancer. With her passing, Foreign Service and military brats and all other Third Culture Kids "lost their mother." As one young person said at her memorial service, "I know that I am a global nomad because Norma told me I am. She gave us a name and a place we can call home."

A regular lecturer at the Foreign Service Institute, the author of the *Journal*'s early articles on raising globally mobile children, and someone actively involved with the Foreign Service Youth Foundation, Ms. McCaig was a vibrant force in the diplomatic community.

Yet as I sat at her memorial service on Nov. 16 at the Unitarian Universalist Church of Reston, with her art on display, listening to her friends and family talk about her personal life, her spiritual life, her artistic life and her professional life, I realized how little I knew about this diminutive redhead. Norma was always much more fascinated with everyone else's story — and how to connect people by sharing their stories.

A Pioneering Vision

Norma M. McCaig was born on July 25, 1945, and moved to the Philippines at the age of 2 with her father, a pharmaceutical executive (as she'd joke, "my daddy peddled drugs in Asia"), mother and brother. At the age of 13, the family moved to Sri Lanka. Norma attended boarding school at the Kodaikanal International School in India, and then finished high school back in the Philippines before returning to the U.S. Norma translated her childhood experiences into a lifetime of promoting international understanding, with a pioneering vision of a cross-cultural identity and organization.

In 1984, she created the term global nomad, both because she did not want to be called a kid and because she wanted a more elegant, and expansive, designation for herself and others like her. This gift of creative terminology is just one of her many contributions to the field of international cultural intercourse, which include "cultural chameleon," "passport culture" and other phrases now whizzing around on the World Wide Web.

Along with sociologists Ruth Hill Useem, who coined the term "Third Culture Kids" in the 1960s, Dave Pollock and Ruth Van Reken, all authorities on growing up internationally, Norma McCaig was a pathbreaker, an energetic champion for the globally mobile community. She was the first to recognize the importance of helping global nomads on "re-entry" into their home country, and envisioned a global nomad club at every college and university. She encouraged many universities to recognize and allow students to designate themselves as global nomads on their applications. This includes the children of Foreign Service personnel as well as those from military, missionary and business families.

"Norma McCaig not only changed our world; she changed my life," writes Van Reken, co-author with Dave Pollock of *Third Culture Kids: The Experience of Growing Up Among Worlds*. "I first met her in 1987, when she dared to cross sector lines and attend a conference about missionary kids (in

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Mikkela Thompson, daughter of retired FSO Ward Thompson, is a global nomad, portrait painter and writer, and the former business manager at the Journal.

Quito), even though she had been raised as a business kid. She shared her dream for Global Nomads, an organization that would be for adults who had grown up in any internationally mobile background. Norma borrowed against her own retirement account to make that conference happen in December 1988 … [It was] the first time adult TCKs gathered together to explore mutually our convergent journeys."

The Foreign Service community knows her best from her articles in the *Foreign Service Journal*, her seminars at the Foreign Service Institute, her presentations at the Foreign Service Youth Foundation's welcome-home potlucks (including one just a month before her death) and the many workshops she led.

A Passionate Advocate

Norma McCaig was passionate about all aspects of her life. She was active in her church, leading meditation classes and participating in the art club, and was an executive-level recruiter. But her greatest strength was her magnetic ability as a consummate communicator, a connector. Every fall, she would host a pumpkin-carving contest; and in the summer, she threw a huge party for her birthday. Whatever the occasion, the goal was always to get as many people as possible together, to work on connections.

A graduate of the Georgetown Training Specialist Program, she reached out to mentor other cross-cultural coaches and worked with anyone and everyone to further her vision of international understanding. This included working at the Washington International Center, organizing cross-cultural training for children at Berlitz and participating with NAFSA, the Association of International Educators, for more than 20 years. She carefully tailored her workshops for each audience, even if the message was the same.

For many years Ms. McCaig was affiliated with George Mason University. She actively helped adult Third Culture Kids become part of the discussion through Ruth Van Reken's "Families in Global Transition" conferences. Appropriately, the 2008 conference honored Norma for her role in getting the movement off the ground in the early 1980s.

The term "global nomad" was born in India. Ms. McCaig had traveled around the world to the South Indian hill station of Kodaikanal for her school reunion. As she was standing in the shower, wondering why she was going to the reunion of a school she had attended for a few years where she may not know anyone, it occurred to her that as soon as she met the other alumni, she would feel at home because they were all "global nomads" like her.

In what may have been a karmic aligning of her universe, she presented a paper in 2001 to the International Society for Krishna Consciousness on the children of devotees, who are often raised in cultures and countries different from those of their parents.

Norma McCaig believed that children raised with a built-in multicultural understanding become culturally sensitive and globally-minded adults for whom any dream, even that of becoming president, is possible.

Closure and Connection

She authored numerous articles and publications on global nomads, "re-entry," transitions, resiliency and her own "Seven Cs" — advice on raising global nomads. The fourth C is instructive in this context:

"*Closure and Connection.* This is an area that is often overlooked. Unless parents have good closure skills, kids have very few chances to pick them up. It is vital to learn about closure and walk your kids through healthy goodbyes. Remember that global nomad children say more goodbyes before the age of 18 than many monoculturals do in a lifetime.

"Even if you experience relatively low mobility abroad, chances are that people are always in transition around you and your children are saying many, many goodbyes in spite of their relative geographic stability. The grief associated with these goodbyes can accumulate unless intentional effort is made to grieve productively. It can be difficult and frightening to watch a child grieve. This is especially true if you have not done your own grieving.

"Communicate to your child that pain around goodbyes is an appropriate emotion that honors what the person (or location, or pet, etc.) has meant to you. Teach your children to incorporate things that they have valued about what or whom they have lost. For example, if your children deeply love an aspect of a culture that you are leaving, allow them to incorporate it into your family culture. If your children miss an especially kind friend, teach them to incorporate that kindness into their own values."

While there was sadness at her memorial service, there is some comfort and a lesson to be learned from Norma McCaig's life. As someone pointed out, she *lived* with cancer, enthusiatic and full of life to her final day. Taking her own advice on grief, I remember when, after a resilience workshop at FSI a year ago, I suggested we eat at one of my favorite hole-in-the-wall kabob restaurants, just so that I could watch with joy as Norma gleefully ordered dish after dish — mango lassi, naan, kebab, raita, dal and kheer. She would nibble and inhale the smells and flavors, reconnecting with her global childhood. I will drink mango lassis the length of my days, recalling Norma — filled with brightness, kindness and a zest for life.

Ms. McCaig is survived by her brother and niece, who were there to take care of her at the end of her life.

Memorial contributions may be made in Norma McCaig's name to the Cancer Foundation (www.cancer.org/). Her legacy Web site can be viewed at http://www.legacy.com/WashingtonPost/GB/GuestbookEntry.aspx?&PersonID=120196511. ■

AFSA NEWS

American Foreign Service Association • February 2009

MEMBERS WANT CONCERNS ADDRESSED BY NEW ADMINISTRATION

Annual Opinion Poll Yields Record Number of Responses

BY STEVE KASHKETT, STATE VICE PRESIDENT

AFSA's annual opinion poll of our State active-duty membership worldwide took on special importance this year because of the U.S. presidential election and the prospect of sweeping changes in the leadership and management of the Department of State. The people of the Foreign Service clearly saw the survey as an opportunity to send a strong message to the new administration about the priorities and initiatives that are important to our profession. The knowledge that AFSA would be meeting with the transition team during the same timeframe prompted a rush to provide feedback.

As a result, this electronic poll got a remarkable, enthusiastic response that leaped above the numbers we witnessed in previous years. More than 5,500 Foreign Service employees at State — nearly half of the entire active-duty ranks — completed the survey. This included thousands of entry-level members, comparable numbers of mid-level personnel and more than 500 Senior Foreign Service officers.

As in past years, the respondents were divided among generalists and specialists, and those serving overseas and domestically, in proportions that statistically match those of the entire State Department Foreign Service contingent. Responses came from every overseas post and every domestic bureau.

Scanning the numerical results of yes/no and multiple-choice questions (reflected in the charts accompanying this article), as well as the thousands of free-form comments that people entered, one gets an unambiguous sense of the foremost concerns on the minds of U.S. diplomats.

Many of the top issues relate to managing a career increasingly dominated by hardship and unaccompanied postings. Of high-ranking importance is the desire for fairness and equity in assignments, as well as apprehensions about guiding our families through the challenges of today's Foreign Service life. Only a small minority of respondents (15 percent) think the department is doing enough to help separated families. Some 71 percent believe that people should be allowed to extend in an overseas or domestic assignment to enable a son or daughter to finish the senior year of high school. And a strong majority (63 percent) want AFSA to advocate for official recognition and benefits for same-sex partners of our members.

Many of the top issues relate to managing a career increasingly dominated by hardship and unaccompanied postings. Of high-ranking importance is the desire for fairness and equity in assignments.

The people of the Foreign Service remain frustrated over the worsening overseas pay disparity and the outgoing administration's neglect of the staffing and resource needs of our embassies and consulates all over the world. A large majority of respondents attach "high importance" to AFSA's efforts to address these two problems. Significant majorities affirm that inadequate funding and staffing have made it more difficult for

Continued on page 41

Renovation Update

In mid-December, AFSA staff moved out of temporary quarters at 1800 N. Kent St. in Rosslyn and were awaiting final checks on the renovated headquarters building at 2101 E St. NW before moving in.

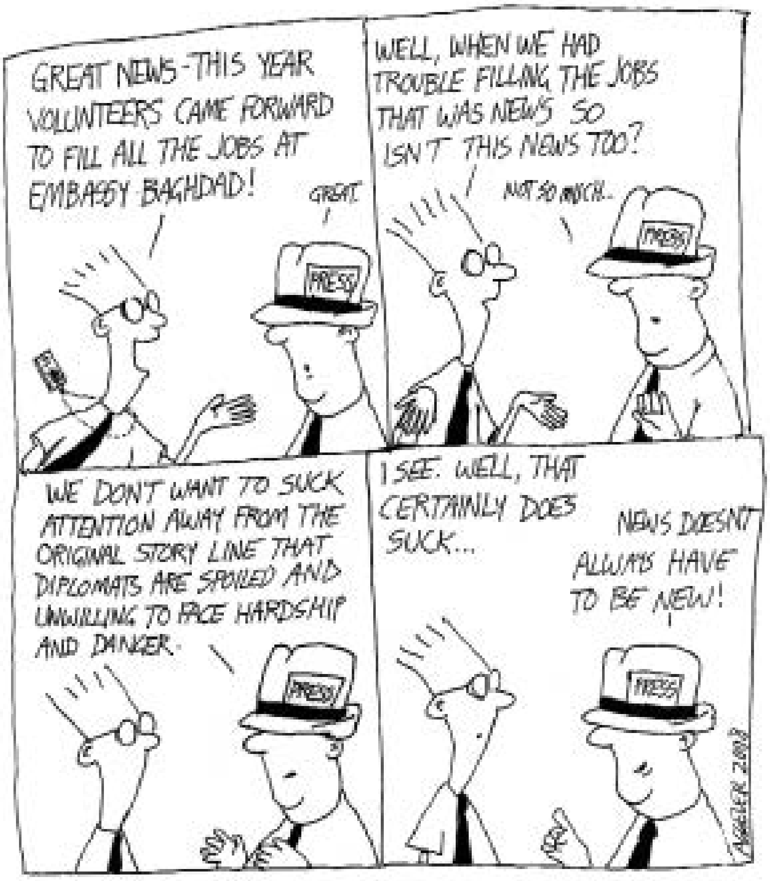
Despite a few of the glitches that seem to be part of every renovation project, we hope to be settling into our renovated offices this month.

We'll keep you posted!

AFSANEWSBRIEFS

Life in the Foreign Service

BY BRIAN AGGELER



AFSA Welcomes Nomination of Hillary Clinton as Secretary of State

AFSA released the following press statement on Dec. 8:

"On behalf of the 11,500 men and women of the U.S. Foreign Service assigned to the Department of State and to our embassies and consulates worldwide, the American Foreign Service Association warmly welcomes the nomination of Senator Hillary Clinton to be the next Secretary of State. We and our members look forward to working closely with the new Secretary to strengthen American diplomacy and to create a Foreign Service adapted to the demands and challenges of the 21st century.

"Secretary-designate Clinton, if confirmed, will oversee a Foreign Service that is in the forefront of U.S. efforts to combat terrorism, poverty, climate change and HIV/AIDS; to promote democracy, trade and respect for human rights; to assist U.S. citizens abroad and ensure that foreigners seeking entry into our country have legitimate reason to do so; to defuse foreign conflicts; and to defend U.S. interests in our management of bilateral and multilateral relations. The Foreign Service will provide Secretary-designate Clinton with wide-ranging, hands-on expertise in every area of foreign policy.

"At the same time, we look forward to collaborating with Secretary-designate Clinton to develop management policies that address the concerns of our professional diplomats, who now spend the vast majority of their careers serving at dangerous hardship posts, including our two largest diplomatic missions in active war zones."

Survey • Continued from page 39

them to do their jobs efficiently and effectively. Overwhelming numbers of responses to these questions leave no doubt that most consider it a fundamental part of the Secretary's job to fight for resources for American diplomacy.

Our opinion poll revealed strong sentiment over professional issues. A whopping 98 percent of respondents agreed that "Foreign Service members, especially senior officers, have a duty to provide frank, constructive advice to the political leadership behind closed doors on foreign policy issues and on management issues impacting the Foreign Service — even if that advice is not welcomed by the superior." Hundreds of comments indicated that people do not believe this has been the case in recent years and are concerned over the lack of open discussion of policy issues. Finally, a very strong majority (76 percent) believe AFSA should oppose unqualified political-appointee ambassadors.

On a positive note, there appears to be a reversal in our members' thinking about their long-term prospects in the Foreign Service. While last year's poll indicated

Some 71 percent believe that people should be allowed to extend in an overseas or domestic assignment to enable a son or daughter to finish the senior year of high school.

Article and charts continue on page 42

Which of the following statements has applied to your assignment history over the past six years? (Please check ALL that apply.)

I have not served at a hardship post.	1002	18%
I have done a tour of duty at a hardship differential post.	4278	76%
I have done a tour of duty at an unaccompanied or limited-accompanied post.	1109	20%
I have served in Iraq or Afghanistan for at least six months.	676	12%

In light of the dramatic increase in the number of unaccompanied State FS positions overseas, do you believe the State Department is doing enough to address the needs of Foreign Service families separated by unaccompanied tours?

Yes, the Department is doing enough to help separated families.	834	15%
Not sure.	2660	47%
No, the Department is not doing enough to help separated families.	2157	38%
Total	5651	100%

Should AFSA argue for keeping or phasing out the special onward-assignment incentives for Iraq service, such as "linked" onward assignments and guarantees of top-five bids?

Keep incentives	2506	44%
Not sure	1051	19%
Phase out incentives	2084	37%
Total	5641	100%

Should AFSA urge the State Department to allow employees to extend the normal tour of duty at overseas posts or to remain in domestic assignments beyond five years FOR THE PURPOSE OF allowing a son or daughter to finish the senior year of high school?

Yes	3983	71%
Not sure	515	9%
No	1145	20%
Total	5643	100%

When the State Department makes changes in assignment policies (such as Fair Share, the 5/8-Year Rule, the rules governing extensions at overseas posts, eligibility of posts for the Student Loan Repayment Program), should AFSA demand, as a matter of principle, that the Department "grandfather in" those employees who had already made bidding decisions under the previous rules?

Yes	4502	80%
Not sure	624	11%
No	525	9%
Total	5651	100%

Should AFSA oppose Senate confirmation of unqualified political-appointee ambassadors?

Yes	4311	76%
Not sure	621	11%
No	714	13%
Total	5646	100%

Survey • Continued from page 41

A whopping 98 percent of respondents believe that "Foreign Service members, especially senior officers, have a duty to provide frank, constructive advice to the political leadership … even if that advice is not welcomed by the superior."

that 41 percent did not expect to remain in the Service for a full career, that number dropped to 21 percent this year (although there was a marked rise in the number of those who responded "not sure"). Again, hundreds of comments suggested that the main reasons for this turnaround were relief at the department's less heavy-handed approach to war-zone assignments this year and anticipation of progressive change with the arrival of a new administration.

The unmistakable impression that emerges from a careful reading of member comments in this poll is of a proud, dutiful Foreign Service accustomed to the increasingly difficult challenges we face overseas and ready for the uphill task of restoring American diplomacy and leadership abroad — but at the same time keenly aware of the need for improvement in the way our leaders treat the diplomatic profession and the men and women who devote their lives to it. ❑

Should AFSA advocate for official recognition and benefits for same-sex domestic partners of Foreign Service members?

Yes		3529	63%
Not sure		795	14%
No		1310	23%
	Total	5634	100%

How much importance do you attach to AFSA's efforts to close the overseas pay gap by lobbying Congress to raise overseas Foreign Service salaries to Washington, D.C., levels?

High importance		4155	73%
Moderate importance		1064	19%
Low importance		298	5%
No importance		140	2%
	Total	5657	100%

How much importance do you attach to AFSA's efforts to secure more resources for Foreign Service staffing, training, and operating budgets?

High importance		4727	84%
Moderate importance		798	14%
Low importance		69	1%
No importance		39	1%
	Total	5633	100%

In your current assignment, do shortfalls in any of the following areas make it more difficult for you to do your job effectively and efficiently? (Please check ANY that apply.)

Funding	3516	70%
Staffing	3131	63%
Training	2521	50%
Office/Post management	1808	36%
Other, please specify	740	15%

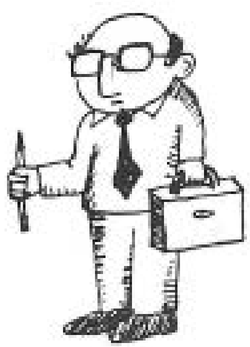
What could cause you to leave the Foreign Service short of a full career? (Please check ANY that apply.)

Excessive hardship/unaccompanied postings	2060	38%
Family concerns	3457	64%
Financial concerns	1916	36%
Lack of resources to accomplish job	1853	34%
Poor management/supervision	2809	52%
Public under-appreciation of Foreign Service	587	11%
Other, please specify	1140	21%

To see the report in full, visit the AFSA Web site at www.afsa.org.

2008 TAX GUIDE

Federal and State Tax Provisions for the Foreign Service



The annual AFSA Tax Guide is designed as an informational and reference tool. Although we try to be accurate, many of the new provisions of the tax code and the implementations of Internal Revenue Service regulations have not been fully tested. Therefore, use caution and consult with a tax adviser as soon as possible if you have specific questions or an unusual or complex situation.

James Yorke (yorkej@state.gov), who compiles the tax guide, would like to thank M. Bruce Hirshorn, Foreign Service tax counsel, for his help in its preparation.

Federal Tax Provisions

The Military Families Tax Relief Act of 2003 continues to provide a significant benefit for Foreign Service families who sell their homes at a profit, but would have been unable to avail themselves of the capital gains exclusion (up to $250,000 for an individual/$500,000 for a couple) from the sale of a principal residence because they did not meet the Internal Revenue Service's "two-year occupancy within the five years preceding the date of sale" requirement due to postings outside the U.S. In relation to the sale of a principal residence after May 6, 1997, the 2003 law notes that the calculation of the five-year period for measuring ownership is suspended during any period that the eligible individual or his or her spouse is serving away from the area on qualified official extended duty as a member of the uniformed services or the Foreign Service.

The five-year period cannot be extended by more than 10 years. In other words, Foreign Service employees who are overseas on assignment can extend the five-year period up to 15 years, depending on the number of years they are posted away from their home. Note that the provision is retroactive, so that anyone who has already paid the tax on the sale of a residence that would have qualified under the new law may file an amended return to get the benefit of the new rule. There is, however, a three-year statute of limitations on this provision, after which one cannot obtain a refund.

Foreign Service employees most frequently ask AFSA about home ownership, tax liability upon sale of a residence and state of domicile. We have devoted special sections to these issues.

For 2008, the six tax rates for individuals remain at 10, 15, 25, 28, 33 and 35 percent. The 10-percent rate is for taxable income up to $16,051 for married couples, $8,026 for singles. The 15-percent rate is for income up to $65,101 for married couples, $32,551 for singles. The 25-percent rate is for income up to $131,451 for married couples, $78,851 for singles. The 28-percent rate is for income up to $200,301 for married couples and income up to $164,551 for singles. The 33-percent rate is for income up to $357,701 for married couples and singles. Annual income above $357,701 is taxed at 35 percent. Long-term capital gains are taxed at a maximum rate of 15 percent and are reported on Schedule D. This rate is effective for all sales in 2008, except for those people who fall within the 10- or 15-percent tax bracket: their rate is either 0 or 5 percent. Long-term capital gain is defined as gain from the sale of property held for 12 months or more.

Personal Exemption

For each taxpayer, spouse and dependent the personal exemption has been increased to $3,500. There is, however, a personal exemption phase-out of 2 percent for each $2,500 of Adjusted Gross Income over $239,950 (married, filing jointly) or $159,950 (single). For those taxpayers who file under the category "married filing separately," the phase-out is 2 percent for each $1,250 of Adjusted Gross Income over $119,975.

Foreign Earned Income Exclusion

Many Foreign Service spouses and dependents work in the private sector overseas and thus are eligible for the Foreign Earned Income Exclusion. American citizens and residents living and working overseas are eligible for the income exclusion, unless they are employees of the United States government. The first $87,600 earned overseas as an employee or as self-employed may be exempt from income taxes.

Note: The method for calculating the tax on non-excluded income in tax returns that include both excluded and non-excluded income was changed, beginning in 2006, so as to result in higher tax on the non-excluded portion. (See the box on page 46 for a full explanation.)

To receive the exemption, the taxpayer must meet one of two tests: 1) the Physical Presence Test, which requires that the taxpayer be present in a foreign country for at least 330 days during any 12-month period (the period may be different from the tax year); or 2) the Bona Fide Residence Test, which requires that the taxpayer has been a bona fide resident of a foreign country for an uninterrupted period that includes an entire tax year. Most Foreign Service spouses and dependents qualify under this test, but they must wait until they have been overseas for a full calendar year before claiming it. Keep in mind that self-employed taxpayers must still pay self-employment (Social Security and Medicare) tax on their income. Only the income tax is excluded.

Extension for Taxpayers Abroad

Taxpayers whose tax home is outside the U.S. on April 15 are entitled to an automatic extension until June 15 to file their returns. When filing the return, these taxpayers should write "Taxpayer Abroad" at the top of the first page and attach a statement of explanation. There are no late filing or late payment penalties for returns filed and taxes paid by June 15, but the IRS does charge interest on any amount owed from April 15 until the date it receives payment.

Standard Deduction

The standard deduction is given to non-itemizers. For couples, the deduction is now $10,900 and for singles, $5,450. Married couples filing separately get a standard deduction of $5,450 and head-of-household filers receive an $8,000 deduction. An additional amount is allowed for taxpayers over age 65 and for those who are blind.

Most unreimbursed employee business expenses must be reported as miscellaneous itemized deductions, which are subject to a threshold of 2 percent of Adjusted Gross Income. These include professional dues and subscriptions to publications; employment and educational expenses; home office, legal, accounting, custodial and tax preparation fees; home leave, representational and other employee business expenses; and contributions to AFSA's Legislative Action Fund. Unreimbursed moving expenses are an adjustment to income, which means that you may deduct them even if you are taking the standard deduction. However, the deduction includes only the unreimbursed costs of moving your possessions and yourself and your family to the new location.

Medical expenses (including health and long-term care insurance, but not health insurance premiums deducted from government salaries) are subject to a threshold of 7.5 percent of Adjusted Gross Income. This means that to be deductible, the medical cost would have to exceed $2,250 for a taxpayer with a $30,000 AGI. There is also an additional 3-percent reduction of itemized deductions (excluding Schedule A deductions for medical expenses, losses from casualties and theft, and investment-interest losses) if the AGI exceeds $159,950. Note that this 3 percent is applied to the AGI over $159,950 and not to the total of itemized deductions on Schedule A. The maximum loss for deductions is capped at 80 percent.

State and local income taxes and real estate and personal property taxes remain fully deductible for itemizers, as are charitable contributions to U.S.-based charities for most taxpayers. Donations to the AFSA Scholarship Fund are fully deductible as charitable contributions, as are donations to AFSA via the Combined Federal Campaign. Individuals may also dispose of any profit from the sale of personal property abroad in this manner.

For 2008 tax returns, any interest paid on auto or personal loans, credit cards, department stores and other personal interest will not be allowed as itemized deductions. If such debts are consolidated, however, and paid with a home equity loan, interest on the home equity loan is allowable. Interest on educational loans will be allowed as an adjustment to gross income. Mortgage interest is still, for the most part, fully deductible. Interest on loans intended to finance investments is deductible up to the amount of net income from investments. Interest on loans intended to finance a business is 100-percent deductible. Passive-investment interest on investments in which the taxpayer is an inactive participant (i.e., a limited partnership) can be deducted only from the income produced by other "passive income." Interest on loans that do not fall into the above categories, such as money borrowed to buy tax-exempt securities, is not deductible.

Home Leave Expenses

Employee business expenses, such as home leave and representation, may be listed as miscellaneous itemized deductions and claimed on Form 2106. In addition to the 2-percent floor, only 50 percent for meals and entertainment may be claimed (100 percent for unreimbursed travel and lodging). Only the employee's (not family members') home leave expenses are deductible. AFSA recommends maintaining a travel log and retaining a copy of home leave orders, which will help if the IRS ever questions claimed expenses.

It is important to save receipts: without receipts for food, a taxpayer may deduct only $39 to $64 a day (depending upon the federal meals-and-incidentals per diem rate at the home leave address), no matter how large the grocery or restaurant bill. Lodging is deductible, as long as it is not with friends or relatives, or in one's own home. The IRS will disallow use of per diem rates and any expenses claimed for family members. If a hotel bill indicates double rates, the single-room rate should be claimed; and, if possible, the hotel's rate sheet should be saved for IRS scrutiny.

Car rental, mileage and other unreimbursed travel expenses, including parking fees and tolls, may be deducted. The rate for business miles driven is 50.5 cents per mile for the first half of 2008, and 58.5 cents for the second half. Those who use this optional mileage method need not keep detailed records of actual vehicle expenses. However, they must keep a detailed odometer log to justify the business use of the vehicle and track the percentage of business use. This optional mileage method applies to leased vehicles as well.

Official Residence Expenses

Since Oct. 1, 1990, employees who receive official residence expenses have not been allowed to reduce their reportable income by 3.5 percent. The IRS ruling regarding ORE states that "usual expenses," defined as 3.5 percent of salary, are not deductible. Therefore the only expenses that are deductible are those above the 3.5 percent paid out of pocket. Employees should save receipts for any out-of-pocket expenses associated with their representational duties. These expenses can be deducted as miscellaneous business expenses.

Home Ownership

Individuals may deduct interest on up to $1 million of acquisition debt for loans secured by a first and/or second home. This also includes loans taken out for major home improvements. On home equity loans, interest is deductible on up to $100,000, no matter how much the home cost, unless the loan is used for home improvements. The $100,000 ceiling applies to the total of all home equity loans you may have. The same generally applies to refinancing a mortgage. Points paid to obtain a refinanced loan cannot be fully deducted the same year, but must be deducted over the life of the loan. It is advisable to save the settlement sheet (HUD-1 Form) for documentation in the event your tax return is selected by the IRS for audit.

Qualified residences are defined as the taxpayer's principal residence and one other residence. The second home can be a house, condo, co-op, mobile home or boat, as long as the structure includes basic living accommodations, including sleeping, bathroom and cooking facilities. If the second home is a vacation property that you rent out for fewer than 15 days during the year, the income need not be reported. Rental expenses cannot be claimed either, but all property taxes and mortgage interest may be deducted.

Rental of Home

Taxpayers who are overseas and rented their homes in 2008 can continue to deduct mortgage interest as a rental expense. Also deductible are property management fees, condo fees, depreciation costs, taxes and all other rental expenses. Losses up to $25,000 may be offset against other income, as long as the Adjusted Gross Income does not exceed $100,000 to $150,000 and the taxpayer is actively managing the property. Note: A taxpayer who retains a property manager does not lose this benefit, as this is still considered active management of the property. All passive losses that cannot be deducted currently are carried forward, and deducted in the year the property is sold.

Sale of a Principal Residence

The current capital-gains exclusion on the sale of a principal residence on or after May 7, 1997, applies to all homeowners regardless of their age. Previously, qualified individuals who were age 55 or older were allowed a one-time capital-gains exclusion of $125,000. Also, under previous law, if you had a gain when you sold your home, you could defer all or part of the gain if you purchased or built another home (of equal or higher value) within two years before or after the sale. These last two provisions no longer apply.

The current tax laws allow an exclusion of up to $500,000 for couples filing jointly and up to $250,000 for single taxpayers on the long-term gain from the sale of their principal residence. One need not purchase another residence to claim this exclusion. All depreciation taken after May 7, 1997, will, however, be recaptured (added to income) at the time of sale, and taxed at 25 percent.

Readers should also be aware that starting in January 2009, gain from the sale of a home will no longer be excluded from gross income for periods when it was rented out before you occupied it as a principal residence. Further details will be included in the 2009 Tax Guide.

The only qualification for the capital-gains exclusion is that the house sold must have been owned and occupied by the taxpayer as his or her principal residence for at least two of the last five years prior to the date of the sale. As stated above, the five-year period may be extended based on any period during which the taxpayer has been away from the area on a Foreign Service assignment, up to a maximum of 15 years (including the five years). There are some exceptions to the two-year requirement, including a sale due to a "change in place of employment" (this would include foreign transfers). This exclusion is not limited to a once-in-a-lifetime sale, but may be taken once every two years.

When a principal residence is sold, capital gains realized above the exclusion amounts are subject to taxation. This exclusion replaces the earlier tax-law provision that allowed both the deferral of gain and a one-time exclusion of a principal residence sale.

Temporary rental of the home does not disqualify one from claiming the exclusion. The new tax law requires only that you have occupied the house as your principal residence for the required period (two years out of five, extended).

Under Internal Revenue Code Section 1031, taxpayers whose U.S. home may no longer qualify for the principal residence exclusion may be eligible to replace the property through a "tax-free exchange" (the so-called Starker Exchange). In essence, one property being rented out may be exchanged for another, as long as that one is also rented. In exchanging the properties, capital gains tax may be deferred. Technically, a simultaneous trade of investments occurs. Actually, owners first sign a contract with an intermediary to sell their property, hold the cash proceeds in escrow, identify in writing within 45 days the property they intend to acquire, and settle on the new property within 180 days, using the money held in escrow as part of the payment.

It is important to emphasize that the exchange is from one investment property to another investment property — the key factor in the IRS evaluation of an exchange transaction is the intent of the investor at the time the exchange was consummated. The IRS rules for these exchanges are complex and specific, with a number of pitfalls that can nullify the transaction. An exchange should never be attempted without assistance from a tax lawyer specializing in this field.

Calculating Your Adjusted Basis

Many Foreign Service employees ask what items can be added to the cost basis of their homes when they are ready to sell. Money spent on fixing up the home for sale may be added to the basis. To qualify as legitimate "fixing-up costs," the following conditions must be met: 1) the expenses must be for work performed during the 90-day period ending on the day on which the contract to sell the old residence was signed; 2) the expenses must be paid on or before the 30th day after sale of the house; and 3) the expenses must not be capital expenditures for permanent improvements or replacements (these can be added to the basis of the property, the original purchase price, thereby reducing the amount of profit). A new roof and kitchen counters are not "fix-up" items. But painting the house, cleaning up the garden and making minor repairs qualify.

State Tax Provisions

Members of the Foreign Service are not treated as domiciled in their countries of assignment abroad. Every active-duty Foreign Service employee serving abroad must maintain a state of domicile in the United States, and the tax liability that the employee faces varies greatly from state to state. In addition, there are numerous regulations concerning the taxability of Foreign Service pensions and annuities that vary by state. This state guide briefly reviews the laws regarding income tax and tax on annuities and pensions as they affect Foreign Service personnel. Please note that while AFSA makes every attempt to provide the most up-to-date information, readers with specific questions should consult a tax expert in the state in question at the addresses given. We also encourage readers to visit the state's tax Web site, also listed.

Most Foreign Service employees have questions about their liability to pay state income taxes during periods when they are posted overseas or assigned to Washington. There are many criteria used in determining which state is a citizen's domicile. One of the strongest determinants is prolonged physical presence, a standard that Foreign Service personnel frequently cannot meet due to overseas service.

In such cases, the states will make a determination of the individual's income-tax status based on other factors, including where the individual has family ties, where he or she has been filing resident tax re-

Foreign Earned Income — Important Change in IRS Rules

The Foreign Earned Income Exclusion allows U.S. citizens who are not government employees and are living outside the U.S. to exclude up to $85,700 of their 2008 foreign-source income if they meet certain requirements.

However, beginning in 2006, the IRS changed the requirement for how the excluded amount needs to be calculated. This affects the tax liability for couples with one member employed on the local economy overseas. Previously, you took your total income and then subtracted your excluded income and paid tax on the remainder. The change now requires that you take your total income and figure what your tax would be, then deduct the tax that you would have paid on the excludable income.

For example:

A Foreign Service employee earns $80,000.

Teacher spouse earns $30,000.

Before 2006: Tax on $110,000 minus $30,000 = tax on $80,000 = tax bill of $13,121.

Now (2006 and later): Tax on $110,000 = $20,615; tax on $30,000 = $3,749; total tax = $20,615 minus $3,749 = tax bill of $16,866.

Increase in tax bill = $3,745.

If you have questions about the implementation of this new regulation, please consult a financial professional.

turns, where he or she is registered to vote or has a driver's license, where he or she owns property, or where the person has bank accounts or other financial holdings. In the case of Foreign Service employees, the domicile might be the state from which the person joined the Service, where his or her home leave address is, or where he or she intends to return upon separation.

For purposes of this article, the term domicile refers to legal residence; some states also define it as permanent residence. Residence refers to physical presence in the state. Foreign Service personnel must continue to pay taxes to the state of domicile (or to the District of Columbia) while residing outside of the state, including during assignments abroad, unless the state of residence does not require it.

A non-resident, according to most states' definitions, is an individual who earns income sourced within the specific state but does not live there or is living there for only part of the year (usually, fewer than six months). Individuals are generally considered residents, and are thus fully liable for taxes, if they are domiciled in the state or if they are living in the state (usually at least six months of the year) but are not domiciled there.

Foreign Service employees residing in the metropolitan Washington, D.C. area are required to pay income tax to the District of Columbia, Maryland or Virginia, in addition to paying tax to the state of their domicile. However, most states allow a credit, so that the taxpayer pays the higher tax rate of the two states, with each state receiving a share.

There are currently seven states with no state income tax: Alaska, Florida, Nevada, South Dakota, Texas, Washington and Wyoming. In addition, New Hampshire and Tennessee have no tax on personal income but do tax profits from the sale of bonds and property.

There are 10 states that, under certain conditions, do not tax income earned while the taxpayer is outside of the state: California, Connecticut, Idaho, Minnesota, Missouri, New Jersey, New York, Oregon, Pennsylvania and West Virginia. The requirements for all except California, Idaho, Minnesota and Oregon are that the individual not have a permanent "place of abode" in the state, have a permanent "place of abode" outside the state, and not be physically present for more than 30 days during the tax year. California allows up to 45 days in the state during a tax year. These 10 states require the filing of nonresident returns for all income earned from in-state sources.

Foreign Service employees should be aware that states could challenge the status of government housing in the future.

The following list gives a state-by-state overview of the latest information available on tax liability, with addresses provided to write for further information or tax forms. Tax rates are provided where possible. For further information, please contact AFSA's Labor Management Office or the individual state tax authorities. As always, members are advised to double-check with their state's tax authorities. To assist you in connecting with your state tax office, we provide the Web site address for each in the state-by-state guide, and an e-mail address or link where available. Some states do not offer e-mail customer service. The Federation of Tax Administrators Web site, at www.taxadmin.org, also provides much useful information on individual state income taxes.

State Overviews

ALABAMA: Individuals domiciled in Alabama are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. Alabama's individual income tax rates range from 2 to 5 percent on gross income over $5,250 for individuals filing separately or $10,500 for individuals filing jointly.
Write: Alabama Department of Revenue, 50 N. Ripley, Montgomery AL 36132.
Phone: (334) 242-1170.
E-mail: Link through the Web site, "About Us" then "Contacts."
Web site: www.ador.state.al.us

ALASKA: Alaska does not tax individual income or intangible or personal property. It has no sales and use, franchise or fiduciary tax. Some, but not all, municipalities levy sales and property taxes. Write: State Office Building, 333 Willoughby Ave., 11th Floor, P.O. Box 110420, Juneau AK 99811-0420.
Phone: (907) 465-2320.
Web site: www.tax.state.ak.us

ARIZONA: Individuals domiciled in Arizona are considered residents and are taxed on any income that is included in the Federal Adjusted Gross Income, regardless of their physical presence in the state. Arizona's tax rate ranges in five brackets from a minimum of 2.59 per cent to a maximum of 4.54 percent of taxable income over $300,000 for married filing jointly or $150,000 for single filers. Write: Arizona Department of Revenue, Taxpayer Information & Assistance, P.O. Box 29086, Phoenix AZ 85038-9086.
Phone: (602) 255-3381.
E-mail: taxpayerassistance@azdor.gov
Web site: www.azdor.gov

ARKANSAS: Individuals domiciled in Arkansas are considered residents and are taxed on their entire income regardless of their physical presence in the state. The Arkansas tax rate ranges in six brackets from a minimum of 1 percent of net taxable income to a maximum of $1,341 plus 7 percent of net taxable income over $31,000 for married filing jointly. Write: Department of Finance and Administration, Individual Income Tax, 1816 West Seventh Street, Room 2300, Ledbetter Building, Little Rock AR 72201.
Phone: (501) 682-7225.
E-mail: Individual.Income@rev.state.ar.us
Web site: www.state.ar.us/dfa/

CALIFORNIA: Foreign Service employees domiciled in California must establish non-residency to avoid liability for California taxes (see FTB Publication 1031). "Safe harbor" provision allows anyone who is domiciled in state but is out of the state on an employment-related contract for at least 546 consecutive days to be considered a non-resident. This applies to most FS employees and their spouses, but members domiciled in California are advised to study FTB Publication 1031 for exceptions and exemptions. The California tax rate for 2008 ranges in six brackets from 1 percent to a maximum of $4,143.52 plus 9.3 percent of the excess over $94,110 for married filing jointly. Non-resident domiciliaries are advised to file on Form 540NR. Write: Franchise Tax Board, P.O. Box 1468, Sacramento CA 95812-1468.
Phone: toll-free 1 (800) 852-5711 (inside the U.S.); (916) 845-6500 (outside the U.S.).
E-mail: Link through the Web site's "Contact Us" tab.
Web site: www.ftb.ca.gov

COLORADO: Individuals domiciled in Colorado are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. Colorado's tax rate is a flat 4.63 percent of federal taxable income plus or minus allowable modifications. Write: Department of Revenue, Taxpayer Service Division, State Capitol Annex, 1375 Sherman St., Denver CO 80261-0005.
Phone: (303) 238-7378.
E-mail: Link through "Contact Us" tab on "Taxation" page, then click on any of the categories in "Online Answers and Customer Support" for e-mail option.
Web site: www.revenue.state.co.us

CONNECTICUT: Connecticut domiciliaries may qualify for non-resident tax treatment under either of two exceptions as follows: Group A — The domiciliary 1) did not maintain a permanent place of abode inside Connecticut for the entire tax year; and 2) maintains a permanent place of abode outside the state for the entire tax year; and 3) spends not more than 30 days in the aggregate in the state during the tax year. Group B — The domiciliary 1) in any period of 548 consecutive days, is present in a foreign country for at least 450 days; and 2) during the 548-day period, is not present in Connecticut for more than 90 days; and 3) does not maintain a permanent place of abode in the state at which the domiciliary's spouse or minor children are present for more than 90 days. For 2008, Connecticut's tax rate for married filing jointly ranges from 3 percent of income less than $20,000, to $600 plus 5 percent of income over $20,000. Write: Department of Revenue Services, Taxpayer Services Division, 25 Sigourney St., Hartford CT 06106-5032.
Phone: (860) 297-5962.
E-mail: drs@po.state.ct.us
Web site: www.ct.gov/drs

DELAWARE: Individuals domiciled in Delaware are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. Delaware's graduated tax rate ranges from 2.2 percent to 5.55 percent for income under $60,000, to a maximum of $2,943.50 plus 5.95 percent of any taxable income over $60,000. Write: Division of Revenue, Taxpayers Assistance Section, State Office Building, 820 N. French St., Wilmington DE 19801.
Phone (302) 577-8200.
E-mail: personaltax@state.de.us
Web site: www.state.de.us/revenue/

DISTRICT OF COLUMBIA: Individuals domiciled in the District of Columbia are considered residents and are subject to tax on their entire income regardless of their physical presence there. Individuals domiciled elsewhere are also considered residents for tax purposes for the portion of any calendar year in which they are physically present in the District for 183 days or more. The District's tax rate is 4 percent if income is less than $10,000; $400 plus 6 percent of excess over $10,000 if be-

tween $10,000 and $40,000; and $2,200 plus 8.5 percent of excess over $40,000. Write: Office of Tax and Revenue, 941 N. Capitol St. NE, 1st Floor, Washington DC 20002.
Phone: (202) 727-4TAX (4829).
E-mail: ocfo@dc.gov
Web site: www.cfo.dc.gov/cfo

FLORIDA: Florida does not impose personal income, inheritance or gift taxes. Beginning in Tax Year 2007, individuals, married couples, personal representatives of estates, and businesses were no longer required to file an annual intangible personal property tax return reporting their stocks, bonds, mutual funds, money market funds, shares of business trusts and unsecured notes. Florida imposes a state sales tax and a use tax of 6 percent. Counties impose further taxes from 0.5 to 1.5 per cent. Write: Taxpayer Services, Florida Department of Revenue, 5050 W. Tennessee St., Bldg. L, Tallahassee FL 32399-0112.
Phone: toll-free 1 (800) 352-3671, or (850) 488-6800.
E-mail: Link through Web site. Go to "Taxes," then "Tax Information," then "Questions?"
Web site: http://dor.myflorida.com/dor/

GEORGIA: Individuals domiciled in Georgia are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. Georgia has a graduated tax rate rising to a maximum of 6 percent of taxable income of $10,000 and above for joint married filers and $7,000 for single filers. Write: Georgia Department of Revenue, Taxpayer Services Division, 1800 Century Blvd. NE, Atlanta GA 30345-3205.
Phone: (404) 417-4477.
E-mail for questions:
taxpayer.services@dor.ga.gov
E-mail for forms: taxforms@dor.ga.gov
Web site: www.etax.dor.ga.gov/

HAWAII: Individuals domiciled in Hawaii are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. For 2008, Hawaii's tax rate ranges in eight steps from 1.4 percent to a maximum of 8.25 percent for taxable income over $48,000 for single filers and $96,000 for married filing jointly. Write: Oahu District Office, Taxpayer Services Branch, P.O. Box 259, Honolulu HI 96809-0259.
Phone: toll-free 1 (800) 222-3229, or (808) 587-4242.
E-mail: Taxpayer.Services@hawaii.gov
Web site: www.state.hi.us/tax

IDAHO: Individuals domiciled in Idaho for an entire tax year are considered residents and are subject to tax on their entire income. Idaho's tax rate rises in eight steps from a minimum of 1.6 percent to a maximum of 7.8 percent on Idaho taxable income of $100,000 or more. However, you are considered a non-resident if: 1) you are an Idaho resident who lived outside of Idaho for at least 445 days in a 15-month period; and 2) after satisfying the 15-month period, you spent fewer than 60 days in Idaho during the year; and 3) you did not have a personal residence in Idaho for yourself or your family during any part of the calendar year; and 4) you did not claim Idaho as your federal tax home for deducting away-from-home expenses on

your federal return; and 5) you were not employed on the staff of a U.S. senator; and 6) you did not hold an elective or appointive office of the U.S. government other than the armed forces or a career appointment in the U.S. Foreign Service (see Idaho Code Sections 63-3013 and 63-3030). A non-resident must file an Idaho income tax return if his or her gross income from Idaho sources is $2,500 or more. Write: Idaho State Tax Commission, P.O. Box 36, Boise ID 83722-0410.
Phone: toll-free 1 (800) 972-7660.
E-mail: taxrep@tax.idaho.gov
Web site: www.tax.idaho.gov

ILLINOIS: Individuals domiciled in Illinois are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. However, it appears that under some circumstances, domiciliaries absent from the state throughout the year may not be subject to tax, so they should check with the Illinois Department of Revenue in advance. The Illinois tax rate remains a flat 3 percent for 2008. Write: Illinois Department of Revenue, PO Box 19001, Springfield IL 62794-9001.
Phone: toll-free 1 (800) 732-8866, or (217) 782-3336.
E-mail: Link through "Contact Us," then "Taxpayer Answer Center."
Web site: www.revenue.state.il.us

INDIANA: Individuals domiciled in Indiana are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. Indiana's tax rate remains a flat 3.4 percent for 2008. Write: Department of Revenue, 100 N. Senate Ave., Indianapolis IN 46204.
Phone: (317) 232-2240.
E-mail: Link through the Web site's "Contact Us" tab.
Web site: www.in.gov/dor

IOWA: Individuals domiciled in Iowa are considered residents and are subject to tax on their entire income to the extent that income is taxable on the person's federal income tax returns. Iowa's 2008 tax rate rises in nine steps from 0.36 percent to a maximum of $38,818.95 plus 8.98 percent of taxable income over $62,055, depending on income and filing status. Write: Taxpayer Services, Iowa Department of Revenue, P.O. Box 10457, Des Moines IA 50306-0457.
Phone: (515) 281-3114.
E-mail: idr@iowa.gov
Web site: www.state.ia.us/tax

KANSAS: Individuals domiciled in Kansas are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. The Kansas tax rate rises from a minimum of 3.5 percent to a maximum of $2,925 plus 6.45 percent of excess over $60,000 for joint filers, or $1,462.50 plus 6.45 percent of excess over $30,000 for single filers. Write: Kansas Taxpayer Assistance Center, Room 150, 915 S.W. Harrison, Topeka KS 66612.
Phone: (785) 368-8222.
E-mail: tac@kdor.state.ks.us
Web site: www.ksrevenue.org

KENTUCKY: Individuals domiciled in Kentucky are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. Kentucky's tax rate ranges from 2 percent on the first $3,000 of taxable income to $4,166 plus 6 percent on all taxable income over $75,000. Write: Kentucky Department of Revenue, Frankfort KY 40602.
Phone: (502) 564-4581.
E-mail: Link through the Web site's "Contact Us" tab.
Web site: revenue.ky.gov

LOUISIANA: Individuals domiciled in Louisiana are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. Louisiana's tax rate starts at 2 percent for the first $12,500 for single filers or $25,000 for joint filers, rising to 6 percent for over $25,000 for single filers or $50,000 for joint filers. Write: Taxpayer Services Division, Personal Income Tax Section, Louisiana Department of Revenue, P.O. Box 201, Baton Rouge LA 70821-0201.
Phone: (225) 219-0102.
E-mail: Link through the Web site's "Contact Us" tab.
Web site: www.revenue.louisiana.gov

MAINE: Individuals domiciled in Maine are considered residents and are subject to tax on their entire income. However, since Jan 1, 2007, there have been "safe harbor" provisions. Under the General Safe Harbor, Maine domiciliaries are treated as non-residents if they satisfy all three of the following conditions: 1) they did not maintain a permanent place of abode in Maine for the entire taxable year; 2) they maintained a permanent place of abode outside Maine for the entire taxable year; and 3) they spent no more than 30 days in the aggregate in Maine during the taxable year. Under the Foreign Safe Harbor provision, Maine domiciliaries are treated as non-residents if they are present in a foreign country for 450 days in a 548-day period and do not spend more than 90 days in Maine during that period. Maine's tax rate rises in three steps from a minimum of 2 percent to a maximum of $1,994 plus 8.5 percent of the taxable income over $38,900 for married taxpayers. Write: Maine Revenue Services, Income Tax Assistance, 24 State House Station, Augusta ME 04333-0024.
Phone: (207) 626-8475.
E-mail: income.tax@maine.gov
Web site: www.maine.gov/revenue

MARYLAND: Individuals domiciled in Maryland are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. Individuals domiciled elsewhere are also considered residents for tax purposes for the portion of any calendar year in which they are physically present in the state for an aggregated total of 183 days or more. For Tax Years 2007, 2008 and 2009 only, U.S. government employees can deduct up to $3,500 of any income earned overseas, including federal pay, if physically present in a foreign country (or countries) for 330 days in the 12-month period. Maryland's tax rate is $90 plus 4.75 percent of taxable income over $3,000 up to $150,000 if filing singly and $200,000 if filing jointly; it then rises steeply to $52,322.50 plus 6.25 percent on taxable income over $1,000,000. In addition, Baltimore City and the 23 Maryland counties impose a local income tax, which is a percentage of the Maryland taxable income, using Line 31 of Form 502 or Line 9 of Form 503. The local factor varies from 1.25 percent in Worcester County to 3.2 percent in Montgomery and Howard Counties (see Web site for details for all counties). Write: Comptroller of Maryland, Revenue Administration Center, Taxpayer Service Section, Annapolis MD 21411.

Phone: toll-free 1 (800) MD-TAXES, or (410) 260-7980.
E-mail: taxhelp@comp.state.md.us
Web site: www.marylandtaxes.com

MASSACHUSETTS: Individuals domiciled in Massachusetts are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. Salaries and most interest and dividend income are taxed at a flat rate of 5.3 percent. Some income (e.g., short-term capital gains) is taxed at 12 percent. Write: Massachusetts Department of Revenue, Taxpayer Services Division, 200 Arlington Street, Chelsea MA 02150.
Phone: (617) 887-6367.
E-mail: Link through the Web site's "Contact Us" tab.
Web site: www.dor.state.ma.us

MICHIGAN: Individuals domiciled in Michigan are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. Michigan's tax rate is 4.35 per cent (up from 3.9 percent as of Oct. 1, 2007). Some Michigan cities impose an additional 1- or 2-percent income tax. Detroit imposes an additional 2.5-percent tax. Write: Michigan Department of Treasury, Lansing MI 48922.
Phone: toll-free 1 (800) 827-4000.
E-mail: treasIndTax@michigan.gov
Web site: www.michigan.gov/treasury

MINNESOTA: Individuals domiciled in Minnesota are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. Minnesota's tax rate is either 5.35 percent, 7.05 percent, or a maximum of 7.85 percent on taxable income over $71,591 for single filers or $126,581 for married filing jointly. Write: Department of Revenue, Mail Station 5510, Saint Paul MN 55146-5510.
Phone: (651) 296-3781.
E-mail: indinctax@state.mn.us
Web site: www.taxes.state.mn.us

MISSISSIPPI: Individuals domiciled in Mississippi are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. Mississippi's tax rate is 3 percent on the first $5,000 of taxable income, 4 percent on the next $5,000 and 5 percent on taxable income over $10,000. Write: Mississippi State Tax Commission, P.O. Box 1033, Jackson MS 39215-1033.
Phone: (601) 923-7000.
E-mail: Link through the Web site's "Contact Us" tab.
Web site: www.mstc.state.ms.us

MISSOURI: An individual domiciled in Missouri is considered a non-resident, and is not liable for tax on Missouri income if the individual has no permanent residence in Missouri, has a permanent residence elsewhere, and is not physically present in the state for more than 30 days during the tax year. Missouri calculates tax on a graduated scale up to $9,000 of taxable income. Any taxable income over $9,000 is taxed at a rate of 6 percent. File a return yearly with Form MO-NRI. Write: Individual Income Tax, P.O. Box 2200, Jefferson City MO 65105-2200.
Phone: (573) 751-3505.
E-mail: income@dor.mo.gov
Web site: www.dor.mo.gov

MONTANA: Individuals domiciled in Montana are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. Montana's tax rate for 2008 rises in six steps from 1 percent of taxable income under $2,600 to a maximum of 6.9 percent of taxable income over $15,600. See the Web site for various deductions and exemptions. Write: Montana Department of Revenue, P.O. Box 5805, Helena MT 59604.
Phone: (406) 444-6900.
E-mail: Link through the Web site's "Contact Us" tab.
Web site: mt.gov/revenue

NEBRASKA: Individuals domiciled in Nebraska are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. The 2008 individual income tax rates range in four steps from a minimum of 2.56 percent to a maximum of $2,173.82 plus 6.84 percent of the excess over $54,000 for joint filers. Write: Department of Revenue, 301 Centennial Mall South, P.O. Box 94818, Lincoln NE 68509-4818.
Phone (402) 471-5729.
E-mail: Link through the Web site "Contact Us" page.
Web site: www.revenue.state.ne.us

NEVADA: Nevada does not tax personal income. There is a sales-and-use tax of between 6.5 and 7.75 percent, depending on the county, and an ad valorem personal and real property tax. Write: Nevada Department of Taxation, 1550 College Pkwy., Suite 115, Carson City NV 89706.
Phone: (775) 684-2000.
Web site: www.tax.state.nv.us

NEW HAMPSHIRE: The state imposes no personal income tax on earned income and no general sales tax. The state does levy, among other taxes, a 5-percent tax on interest and dividend income of more than $2,400 annually for single filers ($4,800 annually for joint filers) and an 8.5-percent tax on business profits including sale of rental property. The inheritance tax was repealed in 2003. Applicable taxes apply to part-year residents. Write: Taxpayer Assistance Office, 109 Pleasant Street, Concord NH 03301.
Phone: (603) 271-2191.
Web site: www.nh.gov/revenue

NEW JERSEY: A New Jersey domiciliary is considered a non-resident for New Jersey tax purposes if the individual has no permanent residence in New Jersey, has a permanent residence elsewhere and is not physically in the state for more than 30 days during the tax year. Filing a return is not required (unless the non-resident has New Jersey-source income), but it is recommended in order to preserve domicile status. Filing is required on Form 1040-NR for revenue derived from in-state sources. Tax liability is calculated as a variable lump sum plus a percentage from a minimum of 1.4 percent of taxable gross income up to $20,000, to a maximum of 8.97 percent on taxable gross income over $500,000. Write: State of New Jersey, New Jersey Division of Taxation, Office of Information and Publications, P.O. Box 281, Trenton NJ 08695-0281.
Phone: (609) 292-6400.
E-mail: Link through the Web site's "Contact Us" page.
Web site: www.state.nj.us/treasury/taxation

NEW MEXICO: Individuals domiciled in New Mexico are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. The basis for New Mexico's calculation is the Federal Adjusted Gross Income figure. For the 2008 tax year, the state has a graduated rate table with four brackets, ranging from 1.7 percent to a maximum of 4.9 percent on New Mexico taxable income over $16,000 for single filers and $24,000 for married filing jointly. Write: New Mexico Taxation and Revenue Department, Tax Information and Policy Office, 1100 St. Francis Drive, P.O. Box 630, Santa Fe NM 87504-0630.
Phone: (505) 827-0700.
E-mail: Link through "E-mail Us" tab at bottom of home page.
Web site: www.state.nm.us/tax

NEW YORK: There is no tax liability for out-of-state income if the individual has no permanent residence in New York, has a permanent residence elsewhere and is not present in the state more than 30 days during the tax year. Filing a return is not required, but it is recommended to preserve domicile status. The tax rate rises in four steps from a minimum of 4 percent to a maximum of 6.85 percent of taxable income over $20,000 for single filers and $40,000 for married filing jointly. In New York City the maximum rate is 3.648 percent. Filing is required on Form IT-203 for revenue derived from New York sources.

A 2001 opinion from the New York tax authorities stated that FS employees not domiciled in New York State but assigned to the U.S. United Nations office for a normal tour of duty would not be considered to be maintaining a permanent place of abode in New York State. Therefore, such individuals are not treated as resident individuals and are taxed as non-residents in New York State. Write: New York State Department of Taxation and Finance, Personal Income Tax Information, W.A. Harriman Campus, Albany NY 12227.
Phone: toll-free 1 (800) 225-5829.
E-Mail: Link through Web site's "Answer Center" tab.
Web site: www.nystax.gov

NORTH CAROLINA: Individuals domiciled in North Carolina are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. The tax rate rises in three steps from 6 percent of taxable income up to $12,750 for single or $21,250 for joint filers, to 7.75 percent (for 2008 and subsequent years) of taxable income over $120,000 for single filers and over $200,000 for joint filers. Residents must also report and pay a "use tax" on purchases made outside the state for use in North Carolina. Write: Department of Revenue, P.O. Box 27431, Raleigh NC 27611.
Phone: toll-free 1 (877) 252-3052. From overseas, call 1 (252) 467-9000.
Web site: www.dor.state.nc.us

NORTH DAKOTA: Individuals domiciled in North Dakota and serving outside the state are considered residents and are subject to tax on their entire income. For 2008 the tax rate ranges from 2.1 percent on taxable income up to $32,550, to a maximum of 5.54 percent on taxable income over $357,700. Write: Office of State Tax Commissioner, State Capitol, 600 E. Boulevard Ave., Dept 127, Bismarck ND 58505-0599.
Phone: (701) 328-2770.
E-mail: taxinfo@nd.gov
Web site: www.nd.gov/tax

OHIO: Individuals domiciled in Ohio are considered residents and their income is subject to tax, using the Federal Adjusted

Gross Income figure as a starting base. For 2008, Ohio's tax rate ranges in nine steps from a minimum of 0.618 percent to a maximum of 6.24 percent on taxable income over $200,000. For Tax Year 2009 the maximum will fall to 5.925 percent. Write: Ohio Department of Taxation, Taxpayer Services Center, 4485 Northland Ridge Blvd., Columbus OH 43229.
Phone: toll-free 1 (800) 282-1780 or (614) 387-0224.
E-mail: Link through Web site's "Contact Us" tab.
Web site: www.tax.ohio.gov

OKLAHOMA: Individuals domiciled in Oklahoma are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. The 2008 tax rate rises in eight stages to a maximum of 5.55 percent on taxable income over $8,700 for single filers and $15,000 for married filing jointly. Write: Oklahoma Tax Commission, Taxpayer Services Division, 2501 North Lincoln Blvd., Oklahoma City OK 73194-0009.
Phone: (405) 521-3160.
E-mail: otcmaster@tax.ok.gov
Web site: www.oktax.state.ok.us

OREGON: Individuals domiciled in Oregon are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. However, under a 1999 law, Oregon exempts domiciliaries who meet the foreign residence requirement for the Foreign Earned Income Exclusion, even though they may be federal employees. The 2008 tax rate rises to a maximum of 9 percent on taxable income over $7,300 for single filers and over $14,600 for married filing jointly. Oregon has no sales tax. Write: Oregon Department of Revenue, 955 Center Street N.E., Salem OR 97301-2555.
Phone: (503) 378-4988.
E-mail: questions.dor@state.or.us
Web site: http://egov.oregon.gov/DOR

PENNSYLVANIA: Pennsylvania tax authorities have ruled that Pennsylvania residents in the U.S. Foreign Service are not on federal active duty for state tax purposes, and thus their income is taxable compensation. For non-Foreign Service Penn. residents, there is no tax liability for out-of-state income if the individual has no permanent residence in the state, has a permanent residence elsewhere, and spends no more than 30 days in the state during the tax year. However, Pennsylvania does not consider government quarters overseas to be a "permanent residence elsewhere." Filing a return is not required, but it is recommended to preserve domicile status. File Form PA-40 for all income derived from Pennsylvania sources. Pennsylvania's tax rate is a flat 3.07 percent. Write: Commonwealth of Pennsylvania, Department of Revenue, Taxpayer Services Department, Harrisburg PA 17128-1061.
Phone: (717) 787-8201.
E-mail: Link through the Web site's "Contact Us" tab.
Web site: www.revenue.state.pa.us

PUERTO RICO: Individuals who are domiciled in Puerto Rico are considered residents and are subject to tax on their entire income regardless of their physical presence in the commonwealth. Normally, they may claim a credit with certain limitations for income taxes paid to the United States on income from sources outside Puerto Rico, and for any federal taxes paid. See the forms on the Web site for 2008 tax rates. Write: Departamento de Hacienda, P.O. Box 9024140, San Juan PR 00902-4140.
Phone: toll-free 1 (800) 981-9236, or (787) 721-2020, ext. 3611.
E-mail: infoserv@hacienda.gobierno.pr
Web site: www.hacienda.gobierno.pr

RHODE ISLAND: Individuals domiciled in Rhode Island are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. The Rhode Island tax rate ranges from 3.75 percent of taxable income up to $26,575 (married filing separately) up to 9.9 percent of taxable income over $349,700. Refer to the tax division's Web site for current information and handy filing hints, as well as for forms and regulations. Write: Rhode Island Division of Taxation, Taxpayer Assistance Section, One Capitol Hill, Providence RI 02908-5801.
Phone (401) 574-8829.
E-mail: txassist@tax.state.ri.us
Web site: www.tax.state.ri.us

SOUTH CAROLINA: Individuals domiciled in South Carolina are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. South Carolina imposes a graduated tax rising in six steps from 2.5 percent on the first $2,500 to a maximum of 7 percent of taxable income over $100,000. Write: South Carolina Tax Commission, 301 Gervais Street, P.O. Box 125, Columbia SC 29214.
Phone: (803) 898-5709.
E-mail: iitax@sctax.org
Web site: www.sctax.org

SOUTH DAKOTA: There is no state income tax and no state inheritance tax. Property and sales taxes vary depending on city and/or county. Sales tax and use tax are generally between 5 and 6 percent. Write: South Dakota Dept. of Revenue, 445 E. Capitol Ave., Pierre SD 57501-3185.
Phone: (605) 773-3311.
E-mail: Link through the Web site's "Contact Us" tab.
Web site: www.state.sd.us/drr2/revenue.html

TENNESSEE: Salaries and wages are not subject to state income tax, but Tennessee imposes a 6-percent tax on dividends and certain types of interest income received by residents. Total sales tax is between 8.5 and 9.75 percent, depending on the jurisdicition. For information write: Tennessee Department of Revenue (Attention: Taxpayer Services), 500 Deaderick Street, Nashville TN 37242.
Phone: (615) 253-0600.
E-mail: TN.Revenue@state.tn.us
Web site: www.state.tn.us/revenue

TEXAS: There is no state income tax. Sales tax ranges from 6.5 to 8.25 percent depending on the jurisdiction. Write: Texas Comptroller of Public Accounts, P.O. Box 13528, Capitol Station, Austin TX 78711-3528.
Phone: toll-free 1 (877) 622-8375.
E-mail: tax.help@cpa.state.tx.us
Web site: www.window.state.tx.us

UTAH: Individuals domiciled in Utah are considered residents and are subject to Utah state tax. Utah requires that all Federal Adjusted Gross Income reported on the federal return be reported on the state return regardless of the taxpayer's physical presence in the state. For 2008, Utah has abolished variable tax rates and has instituted a "single rate tax" of 5 percent on all income. Some taxpayers will be able to claim either a taxpayer tax credit or a retirement tax credit, or both (see Web site for explanation). Write: Utah State Tax

Commission, Taxpayer Services Division, 210 North 1950 West, Salt Lake City UT 84134.
Phone: toll-free 1 (800) 662-4335, or (801) 297-2200.
E-mail: taxmaster@utah.gov
Web site: tax.utah.gov

VERMONT: Individuals domiciled in Vermont are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. The 2008 tax rate ranges from 3.6 percent on taxable income under $32,550, to a maximum of 9.5 percent on taxable income over $357,700 for married filing jointly. Write: Vermont Department of Taxes, Taxpayer Services Division, 133 State Street, Montpelier VT 05633-1401.
Phone: (802) 828-2865.
E-mail: Link through the Web site's "Contact Us" tab.
Web site: www.state.vt.us/tax

VIRGINIA: Individuals domiciled in Virginia are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. Individuals domiciled elsewhere are also considered residents for tax purposes for the portion of any calendar year in which they are physically present in the state for 183 days or more. These individuals should file using Form 760. In addition, Virginia requires non-residents to file Form 763 if their Virginia Adjusted Gross Income in the 2008 or 2009 tax years (which includes any federal salary paid during time they are residing in Virginia) exceeds $11,250 for single filers, $22,500 for married filing jointly or $11,250 for married filing separately. (These amounts will increase to $11,650 and $23,300 in Tax Years 2010 and 2011, and to $11,950 and $23,900 for Tax Year 2012 and beyond.) Individual tax rates are: 2 percent if taxable income is less than $3,000; $60 plus 3 percent of excess over $3,000 if taxable income is between $3,000 and $5,000; $120 plus 5 percent of excess over $5,000 if taxable income is between $5,000 and $17,000; and $720 plus 5.75 percent of taxable income over $17,000. Write: Virginia Department of Taxation, Office of Customer Services, P.O. Box 1115, Richmond VA 23218-1115.
Phone: (804) 367-8031.
E-mail: Link through the Web site's "Contact Us" tab.
Web site: www.tax.virginia.gov

WASHINGTON: There is no state income tax and no tax on intangibles such as bank accounts, stocks and bonds. Sales tax ranged from 7 to 9 percent, depending on the jurisdiction, in the last quarter of 2008; rates are updated quarterly. Residents may deduct Washington sales tax on their federal tax returns if they itemize deductions. Write: Washington State Department of Revenue, Taxpayer Services, P.O. Box 47478, Olympia WA 98504-7478.
Phone: toll-free 1 (800) 647-7706, or (360) 786-6100.
E-mail: Link through the Web site's "Contact Us" tab.
Web site: www.dor.wa.gov

WEST VIRGINIA: There is no tax liability for out-of-state income if the individual has no permanent residence in West Virginia, has a permanent residence elsewhere and spends no more than 30 days of the tax year in West Virginia. However, non-resident domiciliaries are required to file a return on Form IT-140 for all income derived from West Virginia sources. Tax rates rise in four steps from $150 plus 4 percent of income over $5,000 for married filing separately, to $2,775 plus 6.5 percent of income over $60,000 for joint filers. Write: Department of Tax and Revenue, Taxpayer Services Division, P.O. Box 3784, Charleston WV 25337-3784.
Phone: toll-free 1 (800) 982-8297, or (304) 558-3333.
E-mail: wvtaxaid@tax.state.wv.us
Web site: www.wvtax.gov

WISCONSIN: Individuals domiciled in Wisconsin are considered residents and are subject to tax on their entire income regardless of where the income is earned. Wisconsin's current tax rate ranges from 4.6 percent on income up to $9,510 for single filers, to a maximum of $12,078.35 plus 6.75 percent of income over $190,210 for joint filers. Write: Wisconsin Department of Revenue, Individual Income Tax Assistance, P.O. Box 59, Madison WI 53785-0001.
Phone: (608) 266-2486.
E-mail: Use Web site "contact us" page and click on "Taxpayer Assistance."
Web site: www.dor.state.wi.us

WYOMING: There is no state income tax and no tax on intangibles such as bank accounts, stocks or bonds. Sales tax ranges between 4 and 6 percent, depending on the jurisdiction. Write: Wyoming Department of Revenue, Herschler Building, 122 West 25th St., Cheyenne WY 82002-0110.
Phone: (307) 777-7961.
E-mail: DirectorOfRevenue@wy.gov
Web site: revenue.state.wy.us

State Pension & Annuity Tax

The laws regarding the taxation of Foreign Service annuities vary greatly from state to state. In addition to those states that have no income tax or no tax on personal income, there are several states that do not tax income derived from pensions and annuities. Idaho taxes Foreign Service annuities while exempting certain categories of Civil Service employees. Several Web sites provide more information on individual state taxes for retirees, but the Retirement Living Information Center at www.retirementliving.com/RLtaxes.html is one of the more comprehensive.

ALABAMA: Social Security and federal pensions are not taxable. The combined state, county and city sales tax rates average from 7 to 10 percent.

ALASKA: No personal income tax.

ARIZONA: Up to $2,500 of U.S. government pension income may be excluded for each taxpayer. There is also a $2,100 exemption for each taxpayer age 65 or over. Arizona does not tax Social Security.

ARKANSAS: Up to $6,000 of income from any retirement plan is exempt. Social Security is not taxed.

CALIFORNIA: Fully taxable.

COLORADO: Up to $24,000 of pension income is exempt if individual is age 65 or over. Up to $20,000 is exempt if age 55 to 64.

CONNECTICUT: Fully taxable for residents.

DELAWARE: Pension exclusions per person: $2,000 is exempt under age 60; $12,500 if age 60 or over. There is an additional deduction of $2,500 if age 65 or over. Social Security income is exempt.

DISTRICT OF COLUMBIA: Pension or annuity exclusion of $3,000 is applicable if 62 years or older. Social Security is excluded from taxable income.

FLORIDA: There is no personal income, inheritance or gift tax. Florida repealed the "intangibles tax" in 2007.

GEORGIA: For Tax Year 2008, $35,000 of retirement income is excluded for those who are 62 years or older, or totally disabled.

HAWAII: Pension and annuity distributions from a government pension plan are not taxed in Hawaii. Social Security is not taxed.

IDAHO: If the individual is age 65 or older, or age 62 and disabled, CSRS and FSRDS pensions qualify for a deduction in 2008 of up to $26,220 for a single return and up to $39,330 for a joint return. Up to $26,220 may be deducted by the unmarried survivor of the annuitant. The deduction is not available if married filing separately; nor do FERS or FSPS pensions qualify for this deduction. The deduction is reduced dollar for dollar by Social Security benefits. Social Security itself is not taxed.

ILLINOIS: Illinois does not tax U.S. government pensions or Social Security.

INDIANA: If the individual is over age 62, the Adjusted Gross Income may be reduced by the first $2,000 of any pension, reduced dollar for dollar by (non-taxable) Social Security benefits. There is also a $1,000 exemption if over 65, or $1,500 if Federal Adjusted Gross Income is less than $40,000. There is no pension exclusion for survivor annuitants of federal annuities.

IOWA: Generally taxable. However, for the 2007 and 2008 tax years, a married couple with an income for the year of less than $24,000 may file for exemption, if at least one spouse or the head of household is 65 years or older on Dec. 31. Starting with the 2009 tax year, this amount is increased to $32,000. For the 2007 and 2008 tax years, single persons who are 65 years or older on Dec. 31 may file for an exemption if their income is $18,000 or less. Starting with the 2009 tax year, this amount is increased to $24,000. Over age 55, there is a pension/retirement income exclusion of up to $6,000 for single, head of household or qualifying widower filers and up to $12,000 for married filing jointly. The same income tax rates apply to annuities as to other incomes.

KANSAS: U.S. government pensions are not taxed. Social Security is exempt if Federal Adjusted Gross Income is under $50,000.

KENTUCKY: Government pensions attributable to service before Jan. 1, 1998, are not taxed. The portion of annuity income attributable to service after Dec. 31, 1997, is subject to tax at the appropriate rate; the pension exclusion of up to $41,110 is unchanged for 2008. Social Security is not taxed.

LOUISIANA: Federal retirement benefits are exempt from Louisiana state income tax. There is an exemption of $6,000 of other annual retirement income received by any person age 65 or over. Married filing jointly may exclude $12,000.

MAINE: Recipients of a government-sponsored pension or annuity who are filing singly may deduct up to $6,000 ($12,000 for married filing jointly) on income that is included in their Federal Adjusted Gross Income, reduced by all Social Security and railroad benefits. For those age 65 and over, there is an additional standard deduction of $1,350 (single), $1,050 (married filing singly) or $2,100 (married filing jointly).

MARYLAND: Those over 65 or permanently disabled, or who have a spouse who is permanently disabled, may under certain conditions be eligible for Maryland's maximum pension exclusion of $23,600. Also, all individuals 65 years or older are entitled to an extra $1,000 personal exemption in addition to the regular $2,400 personal exemption available to all taxpayers. Social Security is not taxed. See the worksheet and instructions for Maryland Form 502.

MASSACHUSETTS: Distributions made to a retiree from a federal employee contributory plan are excluded from Massachusetts gross income. Social Security is not taxed.

MICHIGAN: Federal government pensions are exempt from taxation in Michigan. Retirement benefits from private sources included in the Adjusted Gross Income are deductible to a maximum of $43,440 on a single return and $86,880 on joint returns for Tax Year 2008. This maximum is reduced by the deduction taken for the government pension. Those age 65 or over may also be able to deduct part of their interest, dividends or capital gains included in the AGI up to $9,690 for single filers and to $19,380 for joint filers for 2008.

MINNESOTA: Generally all pensions are taxable, but single taxpayers who are over 65 or disabled may exclude some income if Federal Adjusted Gross Income is under $33,700 and non-taxable Social Security is under $9,600. For a couple, the limits are $42,000 for Adjusted Gross Income and $12,000 for non-taxable Social Security.

MISSISSIPPI: Social Security and qualified retirement income from federal, state and private retirement systems are exempt from Mississippi tax.

MISSOURI: $6,000 or 35 percent for 2008, whichever is greater, is exempt if public pension income is less than $100,000 when married filing jointly or $85,000 for single filers. This $6,000 is reduced dollar for dollar by the amount the income exceeds these income limitations. In 2008 you may deduct 35 percent of Social Security income if over age 62 and Federal Adjusted Gross Income is less than the limits above.

MONTANA: There is a $3,600 pension-income exclusion if Federal Adjusted Gross Income is less than $30,000. This exclusion can be claimed by each spouse if both have retirement income and is reduced by $2 for every $1 over $30,000. Those over 65 can exempt an additional $800 of interest income for single taxpayers and $1,600 for married joint filers.

NEBRASKA: U.S. government pensions and annuities are fully taxable.

NEVADA: No personal income tax.

NEW HAMPSHIRE: No personal income tax. The inheritance tax was repealed in 2003. There is a 5-percent tax on interest/dividend income over $2,400 for singles ($4,800 married filing jointly). A $1,200 exemption is available for those 65 or over.

NEW JERSEY: Pensions and annuities from civilian government service are subject to state income tax, with exemptions for those who are age 62 or older or totally and permanently disabled. Singles and heads of households can exclude up to $15,000; those married filing jointly up to $20,000; those married filing separately up to $10,000 each. These exclusions are eliminated for New Jersey gross incomes over $100,000. Residents over 65 may be eligible for an additional $1,000 personal exemption.

NEW MEXICO: All pensions and annuities are taxed as part of Federal Adjusted Gross Income. Taxpayers 65 and older may exempt up to $8,000 (single) or $16,000 (joint) from any income source if their income is under $28,500 (individual filers) or $51,000 (married filing jointly). The exemption is reduced as income increases, disappearing altogether at $51,000.

NEW YORK: U.S. government pensions and annuities are not taxed. For those over age 59½, up to $20,000 of other annuity income (e.g., Thrift Savings Plan) may be excluded. See N.Y. Tax Publication 36 for details.

NORTH CAROLINA: Pursuant to the "Bailey" decision, government retirement benefits received by federal retirees who had five years of creditable service in a federal retirement system on Aug. 12, 1989, are exempt from North Carolina income tax. Those who do not have five years of creditable service on Aug. 12, 1989, must pay North Carolina tax on their federal annuities. In this case, up to $4,000 ($8,000 if filing jointly) of any federal annuity income is exempt. For those over 65, an extra $750 (single) or $1,200 (couple) may be deducted.

NORTH DAKOTA: All pensions and annuities are fully taxed, except for the first $5,000, which is exempt minus any Social Security payments if the individual chooses to use Form ND-2 (optional method).

OHIO: Taxpayers 65 and over may take a $50 credit per return. In addition, Ohio gives a tax credit based on the amount of the retirement income included in the Ohio Adjusted Gross Income, reaching a maximum of $200 for any retirement income over $8,000. Social Security is exempt.

OKLAHOMA: Up to $10,000 is exempt on qualified private pensions if the Federal Adjusted Gross Income is under $37,500 for single filers or $75,000 for married filing jointly. In addition, 20 percent of any federal pension may be exempt. Social Security is exempt.

OREGON: Generally, all retirement income is subject to Oregon tax when received by an Oregon resident. However, federal retirees who retired on or before Oct. 1, 1991, may exempt their entire federal pension; those who worked both before and after Oct. 1, 1991, must prorate their exemption using the instructions in the tax booklet. A tax credit of up to 9 percent of taxable pension income is available to recipients of pension income, including most private pension income, whose income was less than $22,500 (single) and $45,000 (joint), and who received less than $7,500/$15,000 in Social Security benefits. The credit is the lesser of the tax liability or 9 percent of taxable pension income. Oregon does not tax Social Security benefits.

PENNSYLVANIA: Government pensions and Social Security are not subject to personal income tax.

PUERTO RICO: For 2007, the first $10,000 of income received from a federal pension could be excluded for individuals under 60. For those over 60 the exclusion was $14,000. Figures for 2008 were not yet available at press time. If the individual receives more than one federal pension, the exclusion applies to each pension or annuity separately. Social Security is not taxed.

RHODE ISLAND: U.S. government pensions and annuities are fully taxable.

SOUTH CAROLINA: Individuals under age 65 can claim a $3,000 deduction on qualified retirement income; those 65 years of age or over can claim a $10,000 deduction on qualified retirement income. A resident of South Carolina who is 65 years or older may claim a $15,000 deduction against any type of income ($30,000 if both spouses are over 65), but must reduce this figure by any retirement deduction claimed. Social Security is not taxed.

SOUTH DAKOTA: No personal income tax or inheritance tax.

TENNESSEE: Social Security and annuities (e.g., Thrift Savings Plan) are not subject to personal income tax. Certain interest/dividend income is taxed at 6 percent if over $2,500 (married filing jointly). However, those over 65 have $16,200 exempted for a single filer and $27,000 for joint filers.

TEXAS: No personal income tax.

UTAH: The new flat tax rate of 5 percent of Modified Adjusted Gross Income can be reduced by the Taxpayer Tax Credit and, for taxpayers over 65, by the Retirement Tax Credit. This latter starts to phase out for incomes over $25,000 for single filers, $32,000 for married or head of household. See the state Web site for details.

VERMONT: U.S. government pensions and annuities are fully taxable.

VIRGINIA: Individuals who were over age 65 on Jan. 1, 2004, can take a $12,000 deduction; those age 62 or 63 on Jan. 1, 2004, can take a $6,000 deduction. Those who reached 62 after Jan. 1, 2004, cannot claim any deduction until they reach 65. For those who reached 65 after Jan. 1, 2004, the $12,000 deduction is reduced by one dollar for each dollar their Adjusted Gross Income exceeds $50,000 for single, and $75,000 for married, taxpayers. All taxpayers over 65 receive an additional personal exemption of $800. Social Security income is exempt. The estate tax has been repealed for all deaths after July 1, 2007.

WASHINGTON: No personal income tax.

WEST VIRGINIA: If under 65, there is a $2,000 pension exclusion. If 65 years or older, you may apply for an additional exclusion of up to $8,000 of income received from any source.

WISCONSIN: Pensions and annuities are fully taxable. Those age 65 or over may take two personal deductions totaling $950. However, benefits received from a federal retirement system account established before Dec. 31, 1963, are not taxable. For tax years starting after Jan. 1, 2008, Wisconsin no longer taxes Social Security benefits included in Federal Adjusted Gross Income.

WYOMING: No personal income tax.

The AFSA Tax Guide is also available at www.afsa.org/news.

AFSANEWSBRIEFS

Welcome to New Elderhostel Administrator

On Jan. 1, Bernard Alter joined AFSA as the new administrator for Elderhostel programming. A retired Foreign Service consular officer, he served largely in Southeast and East Asia.

Mr. Alter takes over Elderhostel duties from Janice Bay, who has spearheaded the program for the last four years. During her tenure, AFSA introduced numerous new initiatives to its Elderhostel offerings and greatly increased enrollments. AFSA thanks Ms. Bay for her dedicated service.

Board Welcomes New FCS VP

The AFSA Governing Board is pleased to welcome Keith Curtis as the new vice president for the Foreign Commercial Service. Mr. Curtis, a senior FSO, is currently the director of strategic planning at the Department of Commerce.

Before joining the Foreign Service in 1990, Mr. Curtis worked in the private sector in information technology and marketing. His Foreign Service assignments have included Tokyo, Brasilia and, most recently, Stockholm, where he was the regional senior commercial officer for Sweden, Denmark, Latvia and Iceland.

He has spoken widely in public forums and has written for various publications, including the *Foreign Service Journal* and the *European Trade Journal.* This is Mr. Curtis' second time serving on the Governing Board: he was an FCS representative from 1995 to 1998.

Executive Director John Mamone Steps Down

AFSA staff and members bade farewell to Executive Director John Mamone on Jan. 2. In a memo sent to staff, AFSA President John Naland praised Mr. Mamone for his contributions to AFSA. "During his 1½ years as our executive director, John was remarkably successful in managing our $2.2 million headquarters renovation, and in guiding us through two annual budget preparation cycles." We wish John well in his future endeavors.

Meanwhile, Legislative Director Ian Houston is filling in as temporary executive director.

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Books

Something for Everyone

Career Diplomacy: Life and Work in the U.S. Foreign Service
Harry W. Kopp and Charles A. Gillespie, Washington, D.C., 2008, $26.95, paperback, 266 pages.

REVIEWED BY JOHN BROWN

Rare are the books that can appeal to several audiences, but *Career Diplomacy: Life and Work in the U.S. Foreign Service* is one of them. Former Foreign Service officers Harry W. Kopp and Charles A. Gillespie have given us a crisp, often witty, overview of the diplomatic profession, complete with a useful glossary and bibliography. Based on a large number of interviews (including with this reviewer, I should disclose), this volume should be of interest to the general reading public, aspiring diplomats and practicing FSOs alike.

The general reading public — and not only in the United States — will benefit from the book's succinct explanation of what the U.S. Foreign Service is all about. According to Kopp and Gillespie, it has a triple mission: representation, operations and policy. Representation means that "[O]n behalf of the United States, the Foreign Service talks, listens, reports, analyzes, cajoles, persuades, threatens, debates and, above all, negotiates." Operations is "dealing every day with host governments and populations, running U.S. programs, executing U.S. laws, giving effect to U.S. policies, offering protection to American citizens and supporting the full U.S. official civilian presence overseas." And policy "involves advising the officials who define national interests and decide what resources should be deployed to secure them." Kopp and Gillespie acknowledge, however, that American diplomats have rarely achieved the influence over policy enjoyed by their counterparts in other nations.

Kopp and Gillespie provide a clear explanation of topics that often appear incomprehensible even to seasoned Foggy Bottom veterans.

For persons unfamiliar with the U.S. Foreign Service, the volume's historical overview of American diplomacy will be valuable. It summarizes how the U.S. diplomatic corps evolved from a function carried out by "amateurs and entrepreneurs" in the 19th century to a professional service, beginning with the enactment of the Rogers Act on May 24, 1924. The subsequent development of the Foreign Service, including its increased focus on embassies' security and the opening of its ranks to women and minorities, is described in just the right amount of detail.

Aspiring diplomats will be enlightened by the sections of the book that dealing with the State Department Foreign Service examination process, assignments and promotions, and its five generalist career tracks (consular, economic, management, political and public diplomacy). The 12-page document titled "Foreign Service Core Precepts (July 2007)," provided in Appendix B, is a useful reminder to potential Foreign Service officers that much will be demanded of them, although the requirements are described in rather general terms. For instance, regarding leadership skills at the entry level, an FSO "takes initiative to go beyond assigned tasks; identifies problems and proposes creative solutions; seeks to improve job and organization performance."

Mindful of the tendency for many Foreign Service personnel to be uninterested in budgetary matters, the authors underscore the need to understand the congressional appropriations process. They also provide a clear explanation of administrative procedures that often appear incomprehensible even to seasoned Foggy Bottom veterans. Interagency conflict and coordination are other important subjects that receive their due.

Kopp and Gillespie deal objectively with current challenges facing the Service, including stabilization and reconstruction in Iraq and Secretary Rice's call for "transformational diplomacy," which makes changing other societies "a more explicit and important goal of American diplomacy."

The final chapter of the book, "Tomorrow's Diplomats," points out that "since the end of the Cold War, diplomatic tools have been allowed to weaken" and that "[t]oday there is a fairly broad consensus across the government and the foreign affairs community that America's diplomatic establishment must be upgraded."

Practicing FSOs will doubtless want to make *Career Diplomacy* part of their library and provide copies to foreign counterparts.

John Brown, who was in the Foreign Service for more than 20 years, compiles "The Public Diplomacy Press and Blog Review" (http://publicdiplomacypressandblogreview.blogspot.com/).

China from Top to Bottom

The Man on Mao's Right
Ji Chaozhu, Random House, 2008, $28.00, hardcover, 354 pages.

REVIEWED BY HERBERT LEVIN

In April 1952 the Chinese Foreign Ministry assigned Ji Chaozhu, an English-language expert, to the North Korean-Chinese delegation at the cease-fire talks with the United States-United Nations side in Panmunjom. Over the next four decades, until he retired in 1996 after five years as a U.N. undersecretary general, nearly all Americans with an interest in China would come to know Ji personally.

This highly personal memoir tells how a boy who grew up in rural Shanxi province managed to be sent to the U.S. for education as a chemist, and then became a diplomat with a lifelong commitment to fostering Sino-American relations.

Though Ji was from a traditional family, his father had studied in Japan and spoke English. In addition, his elder half-brother, Ji Chaoding, had been a Boxer Indemnity scholar at Columbia University. After the collapse of the imperial system, the warlords who dominated Shanxi in Ji's youth brought only a fracturing and weakening of China, allowing Japanese conquest. Republican China had failed; so, by a process of elimination, communism became the accepted means of modernizing the nation for the Ji clan.

The 10-year-old Ji was sent to New York City in 1939. There he graduated from the City and Country School and the Horace Mann Lincoln High School before enrolling at Harvard in 1948. Convinced that the advance of U.S. forces in North Korea to the Chinese border would bring Beijing into the Korean War, preventing his return home, he abandoned his studies and flew back to China, arriving on Oct. 25, 1950.

Over the course of his diplomatic career, Ji interpreted for many top leaders; he expresses unqualified admiration for few, if any, of them in this memoir. He was persecuted by those suspicious that his 11 years in the United States raised questions about his loyalty, as well as by those who viewed the prospect of closer ties with Washington as inimical to their positions in the kind of China they favored.

Ji saw his nation from the top (as "the man on Mao's right") as well as from the bottom. He was sent to labor in the rice paddies in 1959 during the Great Leap Forward-People's Commune Movement and numerous times during the Great Proletarian Cultural Revolution of 1966-1976.

This is not a scholarly work with footnotes and document references. Its unique value is as a firsthand account of how China has viewed the rest of the world over the past 70 years. It also explains why, despite being brutally mistreated by their own government, Ji and his wife, Wang Xiangtong, chose to remain in China rather than come to America. In addition, those interested in Chinese history will find here a clear and readable account of how the new communist regime conducted foreign affairs during a chaotic epoch. ■

Herbert Levin, a Foreign Service officer from 1956 to 1991, was the author's roommate at Harvard University. The two men have maintained personal and professional ties ever since. After retiring from the Service, Levin spent five years as a special adviser to United Nations Undersecretary General Ji.

In Memory

Allan Chubb, 75, a retired USIA Foreign Service officer who resided in Lake of the Woods, near Locust Grove, Va., died on Oct. 6 at Culpeper Regional Hospital in Culpeper, Va.

A Michigan State University graduate with a degree in international relations, Mr. Chubb was a member of Phi Kappa Psi. After service as a first lieutenant in the U.S. Army (Infantry), he pursued graduate studies at American University.

In 1959, Mr. Chubb joined USIA. During a 33-year career, he served overseas in Mexico City, Manila and Rabat, and traveled to every country in Latin America on short business trips as an administrative troubleshooter for the agency.

Mr. Chubb's interests included international relations, history, geography, art, antique cars, travel, architecture, hiking, landscaping, family genealogy and a three-generation-old stamp collection. He was a lifelong Detroit Tigers baseball fan and, with a friend, founded and served as Scout Master of Troup 873 in Truro, Va. He attended The Lake of the Woods Church in Locust Grove, Va. His family was his greatest joy. Mr. Chubb and his wife traveled to more than 16 countries.

He is survived by his wife, Joyce M. Chubb, of Locust Grove, Va.; two sons, Gregg A. Chubb and Kevin S. Chubb (and his wife, Judy); and four grandchildren, Collin, Caitlin, Connor and Cameron Chubb.

Memorial contributions may be made to the Parkinson's Foundation, 8300 Greensboro Drive, Suite 800, McLean VA 22102.

Charles T. Cross, 86, a retired FSO and former ambassador, died on Nov. 2 in Seattle, Wash.

Born in Beijing in 1922 of missionary parents, Mr. Cross lived there until 1940. He attended Carleton College from 1940 to 1942, when he joined the Marines. After completing a year at the Navy Japanese Language School at the University of Colorado, he was assigned to the 23rd Marines of the 4th Marine Division as an intelligence officer and Japanese interpreter. He was with the 23rd for all of the division's landings: Rai/Namur, Saipan, Tinian and Iwo Jima. Mr. Cross was awarded the Bronze Star with Combat V on Saipan. After V-J Day in 1945, he joined the First Marine Division in North China and returned to Beijing, thereby participating in the liberation of his own home from the Japanese.

In 1946, Mr. Cross married Shirley Foss of Faribault, Minn., whose love, intelligence and bravery happily supported him and the family through two more years at Carleton College, a master's degree at Yale University in 1949 and 32 years abroad.

Mr. Cross entered the Foreign Service in 1949 and was assigned to Taipei as assistant public affairs officer. A year later he was posted to Indonesia, and then to Hong Kong. In 1955, Mr. Cross was assigned to Malaysia as a political officer. He subsequently served in Egypt, Cyprus and the U.K.

Mr. Cross was the senior civilian deputy to the Commanding General for the III Marine Amphibious Force for Pacification Operations in I Corps in Danang from 1967 to 1968, and was appointed ambassador to Singapore by President Richard Nixon in 1969.

He also served as consul general in Hong Kong (1974-1977) and was the first director of the American Institute in Taipei (1979-1981), with the rank of ambassador. Interspersed through these years were assignments as officer-in-charge for Burma and Laos, stints at the National War College and as a diplomat-in-residence at the University of Michigan, and service on the Policy Planning Staff and as a Senior Foreign Service inspector.

In l982, the Crosses retired to Seattle, where Ambassador Cross taught in the Jackson School of International Studies and the History Department at the University of Washington. During a decade there, he also undertook three tours with the semester-at-sea program of the University of Pittsburgh and spent a semester as the Benedict Distinguished Visiting Professor at Carleton College. His memoir, *Born a Foreigner — A Memoir of the American Presence in East Asia*, was published by Rowman & Littlefield Publishers, Inc., in 1999.

He was a member of several nonprofit boards: Diplomatic and Consular Officers, Retired, where he was elected to the Board of Governors in 2002 and re-elected in 2005; the Lingnan Foundation in New York; and the Blakemore Foundation in Seattle. He was also active among Foreign Service retirees in Seattle.

Amb. Cross is survived by his wife of 62 years, Shirley, of Seattle; three children: Ann (and her husband, Pug) Edmonds of Bellingham, Wash.; Kathy (and her husband, Bob) Leutner of Iowa City, Iowa; and Richard (and his wife, Anne Danford) of Marblemount, Wash.; seven grandchildren: Rad (and Susannah) Edmonds of Bryn Mawr, Pa.; Nathaniel (and Alice) Edmonds of Bethesda, Md.; Jay, John and Elizabeth Leutner of Iowa City; Nicholas and Ellen Cross of Marblemount; and four great-grandchildren.

Remembrances can be sent to Providence Hospice of Seattle, 425 Pontius Ave. N, Seattle WA 98109.

Marguerita "Maggie" Loomer, 80, a retired Foreign Service secretary and wife of the late retired FSO Walter Loomer, died on Oct. 17 in London.

Born in London and originally a British subject, Mrs. Loomer served as a secretary in the British Foreign Service. She was posted to Luxembourg and then Tunisia, where she met and married Walter Loomer in 1958. She accompanied him to posts in Saudi Arabia, Turkey, Ethiopia, Kenya, Poland, Bolivia and Costa Rica, where she founded the library of the Costa Rica Academy.

In 1975, Mrs. Loomer joined the U.S. Foreign Service as a secretary and, alongside her husband, held posts in Nigeria, the former Soviet Union and Greece. After Mr. Loomer's retirement in 1981, she went on to serve in London, Montreal and, again, London, before retiring in 1993. During her career, she received numerous meritorious awards and commendations, including the Superior Honor Award in 1992.

When her husband passed away in 1989, Mrs. Loomer retired to her birthplace, London, where she remained active in various charitable causes until shortly before her death. She worked as a volunteer for the Red Cross and, most notably, for Oxfam. Her colleagues and fellow volunteers at Oxfam Kilburn voted her Volunteer of the Year in 2002.

All who knew her will remember her for her sense of adventure; her love of life, music and others; her sense of dedication — especially to her Christian faith — and her sense of humor.

Survivors include her children, Katherine Brophy of London, Nicholas "Joe" Loomer of Evans, Ga., and Patrick Loomer of London; grandchildren, William, James, Tyler, Kyle and Kaitlin; her brother, Richard Howard of London; nieces, Caroline and Denise; and nephew, John.

Memorial contributions can be made to Oxfam International.

Geoffrey H. Moore, 56, a retired FSO, died on Nov. 6 at Virginia Medical Hospital in Arlington, Va., after a sudden illness.

Born on July 25, 1952, in Thomas, Okla., Mr. Moore graduated Phi Beta Kappa from the University of Oklahoma in 1974 and received his master's degree in Japanese studies from Yale University in 1976.

Mr. Moore joined the Foreign Service in 1976. During a 25-year diplomatic career, he served overseas in Panama, South Korea, Japan, Jamaica, Thailand and Hong Kong. He retired in 2001.

He is remembered fondly by members of the many A-100 classes he mentored at the Foreign Service Institute, who recall his dedication, his humor and, in particular, his pithy guidance, "Don't be a jerk."

In retirement, Mr. Moore volunteered for the Homeless Animals Rescue Team of Fairfax, Va., serving as a foster parent for homeless pets. Mr. Moore is remembered as a loving husband, brother and uncle who treasured his family and friends.

Mr. Moore is survived by his wife of 27 years, the former Alice Cook, of Arlington, as well as his parents, Jack and Dorita Moore of Roswell, Ga.; a sister, Leslie Moore Gurley, and her husband Tom Gurley Jr., of Lake Charles, La.; two nieces, Jessica Anne Gurley and Stephanie Walters; and one nephew, Tom Gurley III. He also leaves behind two honorary nieces, Alison and Jennifer Hight.

In lieu of flowers, memorial contributions may be made to the Homeless

Animals Rescue Team of Fairfax, Va. (www.hart90.org).

James D. "Dan" Phillips, 75, a retired FSO and former ambassador to Burundi and the Republic of the Congo (Brazzaville), died on Oct. 6 at George Washington University Hospital from complications of a belatedly diagnosed microscopic polyangiitis.

Dan Phillips was born in Peoria, Ill., on Feb. 23, 1933. He attended the University of Colorado and Wichita State University before responding to the military draft in 1953. He served in a Nike Air Defense Battalion at Ft. Dix, N.J. Placed in charge of a donation of great books to his army unit, he found time to read many of them, later tracing his lifelong passion for literature and poetry to that experience.

Following military service he returned to Wichita State on the GI Bill. He spent a year in Vienna as an exchange student during the 1956 Hungarian uprising, joining Austrian students at the border at night to guide refugees to safety. Interviewing some of those refugees for the U.S. embassy sparked his interest in the Foreign Service.

After graduating from Wichita State, Mr. Phillips undertook doctoral studies at Cornell University with Dr. Mario Einaudi, former president of Italy, as his faculty adviser. During this period Mr. Phillips married Rosemary Leeds, and their first two children were born. With Dr. Einaudi encouraging his interest in the Foreign Service, Mr. Phillips and his young family moved to the Washington area in 1961. He was admitted to an A-100 class in 1962 and sent to Paris as his first assignment. That Paris tour included a year as staff aide to Ambassador Charles "Chip" Bohlen, whom he considered a consummate professional.

From there, Mr. Phillips was assigned to Zaire (now the Democratic Republic of the Congo), where he spent two years at the consulate in Lubumbashi and a year at the embassy in Kinshasa covering internal politics. His last year in the country (1966-1967) included dangerous travel as acting consul in Kisangani, delivering relief supplies in areas of eastern Zaire contested by rebels, mercenaries and President Mobutu Sese Seko's army.

After a tour in the European bureau, he was again sent to Paris, where he covered internal politics. He was nominated for the director general's reporting award for his analyses of France's 1973 national elections. From 1973 to 1974, he served as executive assistant to Ambassador Jack Irwin, who became a close family friend. He was then transferred to Luxembourg to serve as deputy chief of mission.

His first job as a chief of mission was in The Gambia, the tiny but idyllic site of Alex Haley's *Roots*. On his return to Washington, he attended the National War College, and then served as an office director in the International Organizations Bureau.

Divorced from Rosemary Leeds in 1980, he remarried in 1984 to Lucie Gallistel Colvin, an expert in African affairs who, in his own words, "contributed immensely to the second half of my career."

In 1984, Mr. Phillips returned to Africa. There he served first as consul general in Casablanca. When President Ronald Reagan called him to offer him the job as ambassador to Burundi, the normally perfunctory call turned into a memorable conversation. "So you got Casablanca. I wanted Casablanca, but they gave it to Bogart!" was reportedly the president's opener.

Upon his arrival in Bujumbura in 1986, Ambassador Phillips was confronted with an autocratic head of state, but the situation improved when a more moderate president was installed in a bloodless coup. Amb. Phillips negotiated access for the U.S. Peace Corps to Burundi for the first time. With his encouragement, Burundi joined and enforced the Convention on International Trade in Endangered Species. He also worked with Dr. Jane Goodall and local volunteers to establish the country's first chimpanzee sanctuary.

After four years in Burundi, Amb. Phillips was appointed ambassador to what was then known as the People's Republic of the Congo in Brazzaville. During a turbulent period there, his active assistance to environmental conservation outlasted the tentative steps the country took toward democracy. He facilitated trilateral negotiations to establish the Ndoki Forest, a unique gem of untouched biodiversity. Continuing to work with Dr. Goodall, he assisted the creation of the Tchimpounga Reserve.

Following three years in Brazzaville, Amb. Phillips spent a year as a diplomat-in-residence at the Carter Center in Atlanta. He retired in 1994 to Arlington, Va., where he headed the Central Africa Foundation and the H.M. Salaam Foundation, the latter a major donor to Georgetown University's School of Foreign Service. He was a board member of the Jane Goodall Institute, a member of the Chevy Chase Club, a spousal member of the Cosmos Club, a Chevalier de

Tastevin and a member of the former International Club.

Amb. Phillips was also one of the principal organizers of "Diplomats and Military Commanders for Change," an effort during the 2004 presidential campaign to prevent continuation of the foreign and national security policies of the first George W. Bush administration.

Mr. Phillips' many friends and admirers remember him as an avid sportsman, skier and golfer, a fine chef, and an accomplished bridge and poker player. A small book of his poetry was privately published and his oral history is in the National Archives. His wry wit was admired and enjoyed by all who knew him.

Amb. Phillips is survived by his wife Lucie Colvin Phillips of Arlington, Va.; his three children, Michael Phillips and wife Sonia of Wichita, Kan.; Madolyn Phillips of Chevy Chase, Md.; and Catherine Phillips Durand and husband Cristophe of Herndon, Va.; grandchildren Jacques and Chloe Durand; two stepsons, Charles Colvin of Shakopee, Minn., and David Colvin of Reston, Va., and their children, Emily, Nora and Zachary. His two sisters, Patricia Daniels of Wichita, Kan., and Rosemary Partridge of Berkeley, Calif., predeceased him.

Donations in Mr. Phillips' memory may be made to the James D. Phillips International Fellowship Fund at the Wichita State University Foundation.

Norma Louise Rathner, the wife of retired FSO Herbert Rathner, died on Sept. 29 of pancreatic cancer at her home in Fairfax, Va., surrounded by her family.

Born in Hammond, Ind., Mrs. Rathner attended Hammond High School and graduated from Purdue University with degrees in home economics and elementary education. As a child, she studied all forms of dance. During high school summers, she performed as an acrobat at state fairs and in USO shows for military camps across the United States. Upon graduation, she worked as a home economics teacher at Mt. Rainier High School in Hyattsville, Md., and for the Prince George County Department of Parks & Recreation. There she met

Herbert Rathner, and they married on July 4, 1956.

The couple then began a life of travel with Foreign Service assignments to Orleans, France and Wiesbaden, Germany. Over the decades, Mrs. Rathner raised her family while stationed in Sierra Leone, Korea, Bolivia, Switzerland, Mississippi, Jamaica and Washington, D.C. She and her husband traveled extensively throughout the United States, making many good friends.

Mrs. Rathner loved to read, garden, study the Bible, play Scrabble, create scrapbooks of family travels and write letters. She possessed the gift of making a house into a home. She especially enjoyed making colorful quilts, giving many as gifts and donating others to various charities, including the Northern Virginia Training Center. She also supported the Fairfax Kiwanis Club, The Lamb Center and Fairfax County Library.

She is survived by her loving husband of 52 years, Herbert; children, Kathryn (Big Sky, Mont.), James and William (Henderson, Nev.); and brother, Walter Pavelchek (West Chester, Pa.). She was predeceased by her parents, Frank and Louise Pavelchek and her daughter, Ann.

Mary Jo Simons, 97, widow of the late FSO Thomas W. Simons, died peacefully on Nov. 11 at Pennsylvania Hospital in Philadelphia, Pa., of complications following hip replacement surgery.

Born in Sullivan, Ind., on Sept. 9, 1911, Mrs. Simons graduated with Phi Beta Kappa honors from Depauw University in 1933 and received her M.A. from the University of Colorado in 1936. She married her husband, a freshly minted Ph.D., that same year, and they taught and worked in Indiana and Minnesota, his home state, until moving to Washington in 1944. Thomas Simons joined the State Department in 1945.

For the next 18 years Mary Jo Simons was half of a State Department Foreign Service team serving abroad in four posts — Calcutta (1945-1946), Karachi (1947-1949), Monrovia (1955-1957) and Madras (now Chennai) (1957-1963) — and in the department.

After her husband's 1963 retirement, they lived in East Lansing, Mich., where he established a South Asian studies program at Michigan State University. The couple then relocated to Poona (now Pune), India, where he was director of the American Institute of Indian Studies from 1965 to 1969.

They then retired to Washington, where Mrs. Simons taught in D.C. and Maryland public schools, served as executive chairman of the Phi Beta Kappa Association of Washington, D.C., and was a regent of the Daughters of the American Revolution's Ruth Brewster Chapter and a docent at the DAR Museum. She was also a member of Mortar Board, the Asian-American Forum, Alpha Omicron Pi sorority, the American Association of Foreign Service Women (now the Associates of the American Foreign Service, Worldwide), and the Chevy Chase Presbyterian Church (for more than half a century).

Bright, lively and adventurous, Mary Jo Simons lived a big life in what many see as America's century. And, like her husband, who died in 1990, she chose "God Bless America" for the response to the benediction in her memorial service at Chevy Chase Presbyterian Church on Dec. 29; she was then buried next to him in Rock Creek Cemetery's Foreign Service section.

Mrs. Simon leaves a son, retired FSO Thomas W. Simons Jr. of Cambridge, Mass.; a daughter, Sara Simons of Philadelphia, Pa.; four grandchildren; two great-grandchildren; and a sister, Mrs. Henry A. Shorey III of Bridgton, Maine.

Virginia Hill Stephens, 86, wife of the late FSO Richard H. Stephens, died at the Virginia Medical Center in Arlington, Va., on Nov. 20 of vascular disease.

Virginia Hill was born on March 10, 1922, in Trinity, N.C., and left a North Carolina tobacco farm during the Great Depression to go to secretarial school at High Point College. From 1942 to 1943 she was a government secretary on the staff of U.S. Army General George Patton, where she worked on the North African campaign. Her twin brother, U.S. Army Private First Class Virgil Hill, was killed in action during World War II at the Battle of the Bulge in 1944.

During her service with Gen. Patton, she met U.S. Army Captain Richard H. Stephens, who was also on Gen. Patton's staff. They were married in Panama in 1943.

Mrs. Stephens began her life as a Foreign Service wife in 1945 in Paris, where she lived in architect Le Corbusier's house at 16th Arrondissement near the Bois de Boulogne on Rue Nuggesser-et-Coli and came to know dress designer Elsa Schiaparelli. Richard and Virginia Stephens served overseas for 16 years in Puerto Alegre, Sydney, Hong Kong, Tokyo and the Dominican Republic. In 1958, they moved to

Bethesda, Md., maintaining a residence there for 42 years.

Mrs. Stephens' raised four children and worked at the National Institutes of Health in Bethesda, Md., as a secretary. While her husband served as a full professor for 18 years at the International College of the Armed Forces of the National Defense University, at Fort McNair in Washington, D.C., Mrs. Stephens earned a certificate in gemology in 1968 and an associate degree in fine arts in 1974 from Montgomery College. She was a jewelry designer, painter and sculptor and loved to go to art museums and gardens. She designed and imported lovely capes of vicuña wool from Peru.

The couple moved to South Miami, Fla., in 2000. After her husband of 60 years died in 2003, Mrs. Stephens remained there until 2007, when she returned to the Washington area to live in McLean, Va.

Virginia Stephens is survived by her four children: Rochelle S. Ames of Cheyenne, Wyo.; Diana S. Watkins of McLean, Va.; Julia Stephens Knapp of Chapel Hill, N.C.; and Robert Hunter Stephens of McLean, Va. She also is survived by nine grandchildren and one great-granddaughter. ■

E-mail your "In Memory" submission to the Foreign Service Journal *at FSJedit@afsa.org, or fax it to (202) 338-6820. No photos, please.*

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Reflections

A Confrontation in Moscow

By Kempton Jenkins

At 7:30 p.m. on Jan. 13, 1961, I found myself walking briskly from Spaso House, the storied U.S. ambassador's residence in Moscow, to the U.S. embassy on "the ring" one mile away. My feet crunched in the light dusting of snow that covered up some of the tackiness of Moscow's fading architecture. It was bitterly cold, but I was warmed by the adrenaline coursing through my system following the most dramatic negotiation I had ever experienced.

It had been the second of four sessions Ambassador Llywellyn Thompson had with Soviet Foreign Minister Andrei Gromyko on the tense dispute over access to Berlin. The meeting began with a 40-minute diatribe by Gromyko, who pounded his chair arm as he denounced the United States and its allies for clinging to the "archaic claims" of four-power sovereignty over the former (and future) German capital.

The climax came when Gromyko reiterated Nikita Khrushchev's ultimatum to the West to accept East German sovereignty over West Berlin or find itself forcibly expelled. He stated that if the U.S. persisted in rejecting Moscow's reasonable proposals, it would have only itself to blame for any catastrophe that might follow — even such unthinkable things as the incineration of New York City!

Amb. Thompson sat calmly listening — chain-smoking, as was his wont. Although fluent in English, Gromyko spoke in Russian, which was then translated by the ubiquitous Foreign Ministry English-language expert, Victor Sukhodrev. For me, the double presentation was critical. I was able to sketch out Gromyko's denunciations in Russian and then flesh out his remarks from the translation.

> *The meeting began with an uninterrupted 40-minute diatribe by Gromyko.*

At the end, Gromyko looked up at Amb. Thompson, who continued to drag on his ever-present cigarette. After what seemed like 15 minutes but was probably 30 seconds, he snuffed it out and looked impassively at his interlocutor. Still he said nothing. Finally, Gromyko blurted out, "Well, Mr. Ambassador…," to which Thompson very deliberately and softly said:

"Mr. Foreign Minister, I deeply regret that the policy of your government has required you to put on such a performance. You know as well as I that if there is to be a nuclear exchange between our two great nations, the incineration will be of the Soviet Union, which will disappear from the face of the earth. I will report your remarks to my government with deep disappointment."

With that he and I rose and departed, leaving Gromyko ashen-faced and clearly embarrassed in front of his colleagues, Deputy Foreign Minister Vladimir Semyonov and Sukhodrev. We strode out to our car. I returned to the embassy to dictate a virtually verbatim account of the meeting in the form of an "eyes only" flash telegram to President Dwight Eisenhower and Secretary of State John Foster Dulles.

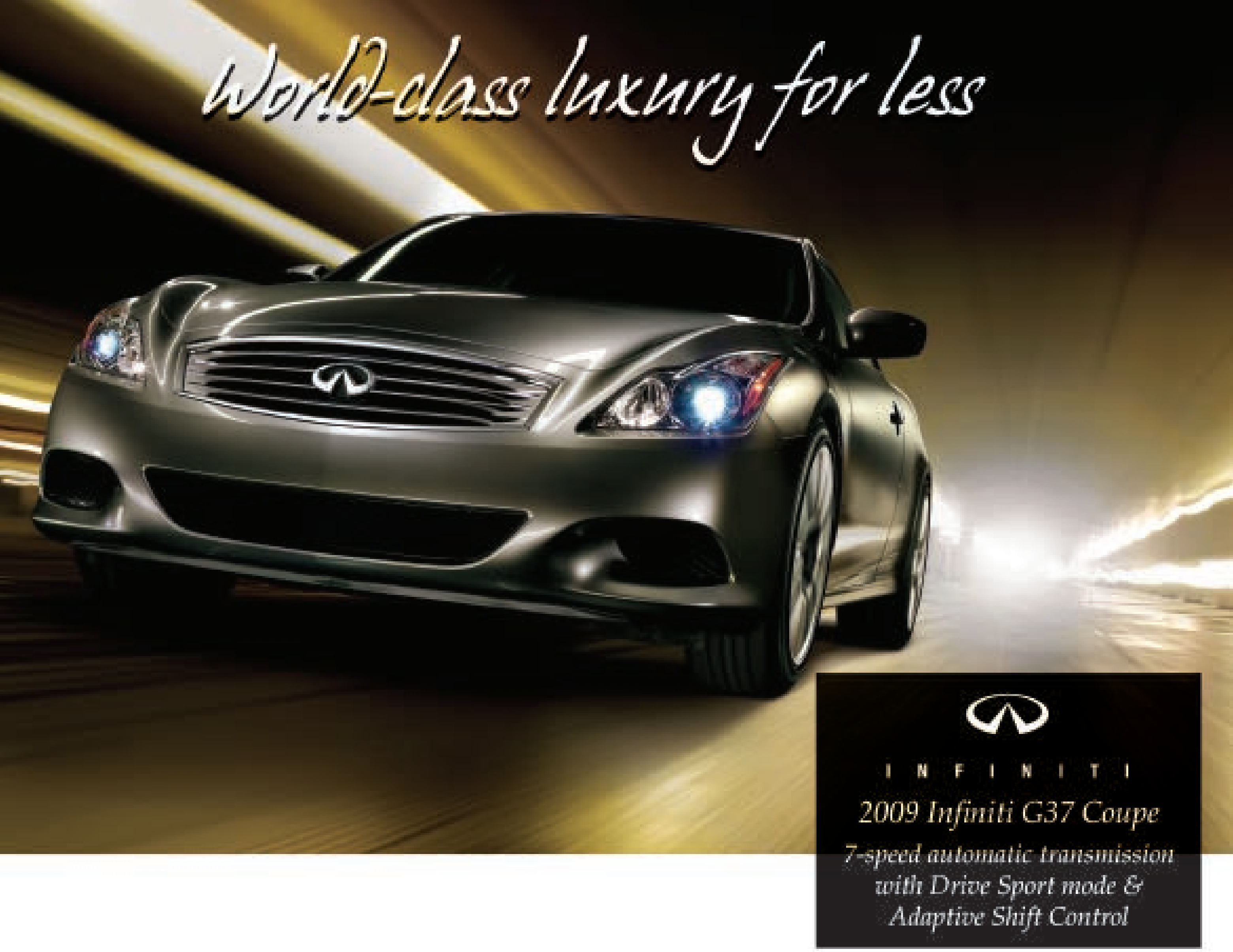
Within the hour, I went to Spaso House, where the ambassador refined my notes. (He gave me the privilege of reviewing his impressions and even making some suggestions.) When I went to take the car back to the embassy, where the message would be cabled, the driver had mysteriously disappeared. I called the embassy, but no car was available. So I folded the drafts, pressed them into my pocket and set off on foot.

Initially, I entertained some concern about the security of walking through the streets of Moscow with such an important document on my person, but after brief reflection, I realized I had probably never been safer in my life. For it was of the utmost importance to the Soviet government that the account of this meeting get to Washington as soon as possible.

As I walked through the snow, my heart still beat with the excitement of the confrontation. I mulled over the admiration I felt for my ambassador and the cold-blooded, totally compelling response he had given to the obviously flustered Gromyko.

In retrospect, it probably was as close to World War III as we came. ■

Kempton Jenkins is a retired Foreign Service officer who served mostly in Russia and Europe.



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