

THE FOREIGN SERVICE JOURNAL

PUBLISHED BY THE AMERICAN FOREIGN SERVICE ASSOCIATION

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HOW
THEY
SEE US

10 YEARS AGO **IN HAITI**



TEACHING DIPLOMACY TODAY

THE FOREIGN SERVICE JOURNAL

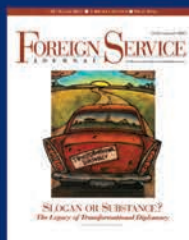
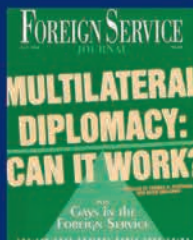


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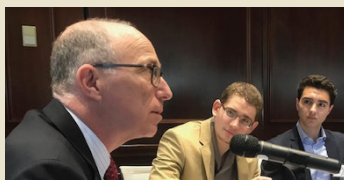
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On the Cover—How They See Us: image by Dennis Harms/TheiSpot.com. Haiti Earthquake: photo by USAID/Kendra Helmer.

A Year of Challenge and Opportunity

BY ERIC RUBIN

As the dramatic year of 2019 draws to a close, I want to update AFSA's members on what our professional association and union has done and what we are doing to support and defend our members and our Foreign Service.

We have all witnessed the courage and patriotism of our colleagues who were subpoenaed to testify before the House of Representatives in the impeachment hearings. None of us, least of all those who were required to testify, welcomed this challenge. We are nonpartisan, nonpolitical public servants who carry out our work and uphold our oath to the Constitution. But when the time came, U.S. diplomats made us proud. Our fellow Americans saw the best of our Service and the best of our nation.

We at AFSA have been working hard to defend and support our colleagues who have been caught up in this battle. We successfully negotiated with State Department management to ensure that there will be no retaliation against those who complied with congressional subpoenas. We secured permission for our members to accept pro bono representation, which otherwise would have been prohibited.

Another positive development was that State agreed to support travel orders, per diem and official time for those who were

subpoenaed from overseas. And State also agreed to provide some funding to defray legal costs for those testifying.

In addition, we confirmed that the Legal Defense Fund can accept money from outside donors to pay the attorney fees of FS members.

AFSA's Legal Defense Fund has raised hundreds of thousands of dollars to contribute to legal costs for our members who have been called to testify. We are optimistic that none of our members who have had to testify will need to pay out of pocket for the enormous costs of legal defense.

And we have used this unwelcome crisis as an opportunity to focus attention on the work of the women and men of the Foreign Service at a time when some of our most basic assumptions have come under question.

We are the U.S. Foreign Service. We serve our country and advance its interests across the globe. We loyally carry out the policy of the elected leaders of our country, in good times and in bad. We and our family members pick ourselves up and move to every corner of the globe, to places that sometimes are scary and unhealthy and unsafe.

At this very challenging time for our country and our Service, we must continue to carry out our mission and stay true to the oath that we all took to the Constitution. America needs experienced, qualified diplomats to defend its interests. There is no substitute for the years of knowledge, experience, language expertise and dedication that we,

the members of the U.S. Foreign Service, bring to the table.

What do we ask? That our patriotism, sacrifice and dedication be recognized and respected. That our commitment to nonpartisan, nonpolitical service be taken for what it is: a solemn oath to duty, honor and country.

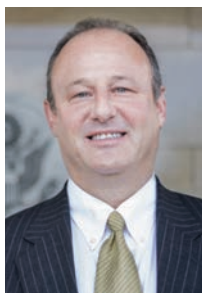
As we move into the new year, AFSA will continue to support our members and our Service. We will continue our efforts to defend individual members who may be called to testify in impeachment proceedings.

At the same time, we will work to advance our larger interests: full congressional funding for international engagement and foreign assistance. And we will address critical issues affecting Foreign Service members of all ranks, from policies supporting families with special needs children to efforts to ensure that tandem couples are able to serve together overseas. We will address the concerns of specialists.

We will continue to advocate with management and on the Hill for adequate staffing at our overseas missions. We will work hard to ensure that Foreign Service members have the opportunity to serve overseas to advance our national interest, as well as develop their careers.

We will push for additional focus on diversity, and the need to ensure that our Foreign Service truly represents America.

We want to hear from you. Please let us know how we can better represent you in these difficult times. ■



Ambassador Eric Rubin is the president of the American Foreign Service Association.

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PROFESSIONAL POLICY ISSUES

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How They See US

BY SHAWN DORMAN

The start of a new year is a time for reflection and renewal. In that spirit, our focus in this double issue is on how foreign diplomats view the United States—or, How They See US. Through their varied lenses, we can gain valuable insights into our own diplomatic practices and the evolution of our role within the world community.

FSO and FSJ Editorial Board Chair Alexis Ludwig sets the scene in “Outside Observers See the United States in Ways We Ourselves Cannot.” Perspective is critical, he reminds us, noting that our own self-assessments tend to the extreme. Either we are a “City upon a Hill” to the world, or a society headed for inexorable decline.

Senior British diplomat Patrick Davies, currently on a career break to write a book on the United States, shares the workings of the “special relationship,” describes the unique qualities of American diplomats, and urges us to double down on maintaining close bilateral ties.

Next is a candid view from one of Panama’s former ambassadors to Washington, Jaime Alemán. Despite the strong links between the two nations, there are real concerns within the relationship, which must be addressed openly and respectfully.

In a similar vein, Bolivian diplomat Jaime Aparicio Otero,



Retired FSO Larry Mandel pays tribute to music diplomacy in Reflections, and we get a glimpse of winter dawn on the Yamuna River in New Delhi in Local Lens. Please don’t forget we’re always looking for your best recent photo for

Shawn Dorman is the editor of The Foreign Service Journal.

a former ambassador to the United States and vice minister of foreign affairs, describes the ups and downs of working with the United States. He looks forward to a renewed U.S. commitment to a “partnership of substance” with the democracies of the Americas.

This month’s cover story, “Teaching Diplomacy Today,” provides guidance for those considering a post-Foreign Service career in academia. FSO (ret.) Jillian Burns and FSO Mark Storella share their experiences with university-level teaching and offer practical advice for others on how to find positions and what to consider along the way.

A decade after the devastating January 2010 Haiti earthquake, we present perspectives from two of the FSOs who experienced that tragedy in Port-au-Prince. David Lindwall, who was deputy chief of mission at the time, takes us through the first long hours in “A Night to Remember.” And in “Tremblement!” then-USAID Mission Director Carleene Dei shares her lessons learned from being both a recovery worker and a survivor.

We always strive to supply you with “news you can use,” and that certainly applies to AFSA’s annual Tax Guide, which you’ll find in AFSA News.

Retired FSO Larry Mandel pays tribute to music diplomacy in Reflections, and we get a glimpse of winter dawn on the Yamuna River in New Delhi in Local Lens. Please don’t forget we’re always looking for your best recent photo for

the back page of the *Journal*. Send your submissions to locallens@afsa.org.

This month, we are pleased to introduce a new occasional feature—Off-Road with the Foreign Service. We invite members of the FS community to share a favorite recent overseas adventure, including illustrative photos. We start with photographer Peter Kennett’s close encounter with a hippo in Uganda.

It’s easy to get consumed by Washington news, by the impeachment proceedings and concerns about big issues facing the Foreign Service and our country. We hope the Off-Road feature will be a reminder of the fun parts of FS life, the exciting and unexpected moments that come along when we are immersed in life and work in another country, landscape and culture.

Please send *your* recent adventure to journal@afsa.org, including a narrative up to 700 words and up to five high-resolution photos.

As President Eric Rubin discusses in his column, 2019 was full of challenges and opportunities. So we asked FSJ Editorial Board member Harry Kopp, our unofficial historian, to look back at other times when the Foreign Service has faced existential threats. The resulting Speaking Out column, “Truth and Honor,” is not to be missed.

Happy New Year to the Foreign Service community. Thank you for your continued service around the world. Here’s hoping 2020 brings renewed support for U.S. diplomacy, as a watchful world looks on. ■

Please Stay

Having read President's Views by Ambassador Eric Rubin in the October *FSJ*, "We Are Career Professionals Serving Our Country," I would like to offer my thanks and appreciation for the column.

I most certainly understand and sympathize with the decision of those FSOs who have chosen to resign. I am frankly happy that I am retired and do not have to face that kind of decision at this point myself, and I most certainly would not criticize the decision made by any who have taken that path.

At the same time, I also fully appreciate the damage that has been done to the institution of the Foreign Service and our international relations in general. I recognize that the efforts to recover and rebuild will require time and a great deal of commitment, made more difficult by the significant expertise and knowledge that have been lost through the departure of many excellent FSOs, especially at the senior level.

I therefore support the sentiments expressed by Amb. Rubin, and offer my thanks and congratulations to him for putting those forward.

Roger Meece

*Ambassador, retired
Seattle, Washington*

Dissent in the Shadows

In his October Speaking Out column ("There Is No 'Complacent State'"), Andrew Kelly draws heavily on his experience as a former Army officer to critique FSOs like Chuck Park who have gone public with their reasons for resigning from the Service. But his rationale is largely rooted in military tradition, not Foreign Service culture.



Nowhere, for example, does Mr. Kelly even allude to the existence of the Dissent Channel, created nearly 50 years ago to empower FSOs to challenge official policy. And even before that, as *Journal* readers know very well, AFSA began honoring dis-

sident through four awards for members, which it proudly continues to do.

Given that the armed forces have no equivalent to either of those institutions, I see no basis for Mr. Kelly's apparent belief that resigning diplomats have some sort of professional "duty" to slink off into oblivion after abandoning their posts. There certainly is no basis for that position in our oath of office, the Foreign Service Act, the Foreign Affairs Manual or any other authority.

But even if there were, allow me to offer the shining counterexample of Lieutenant Colonel Alexander S. Vindman, an active-duty Army officer with years of diplomatic experience. On Oct. 29, he testified before the House Permanent Select Committee on Intelligence, the House Committee on Foreign Affairs, and the House Committee on Oversight and Reform as a concerned National Security Council staffer who was tasked to listen to President Donald Trump's infamous July 25 phone call to Ukrainian President Volodymyr Zelensky.

Explaining his reasons for coming forward, Lt. Col. Vindman said: "I did not think it was proper to demand that a foreign government investigate a U.S. citizen, and I was worried about the implications for the U.S. government's

support of Ukraine. I realized that if Ukraine pursued an investigation into the Bidens and Burisma, it would likely be interpreted as a partisan play which would undoubtedly result in Ukraine losing the bipartisan support it has thus far maintained. This would all undermine U.S. national security."

I put it to *FSJ* readers: Whose actions more closely resemble those of Lt. Col. Vindman—the resignations of Chuck Park and other courageous FSOs, or the second-guessing by critics who prefer dissent remain in the shadows?

*Steven Alan Honley
Former FSO
Washington, D.C.*

When the USSR Changed

I enjoyed reading Margaret McMillion's reminiscences of the days when the Berlin Wall fell while she studied in the National War College class of 1990 (November *FSJ*). I was in the NWC's FSO contingent the previous year. We had 1989's immediate pre-fall perspective.

One of the dominant themes throughout the year was whether the Soviet Union was changing—or sometimes in our more optimistic discussions, whether it had evolved in some fundamental way.

Speaker followed speaker, from President Ronald Reagan to intelligence analysts. No one was prepared to venture that the USSR had really changed. Even Margaret Thatcher's phrase, "post-Cold War world," drew a lot of skeptical frowns.

There was one exception: the Soviet ambassador. In his presentation, he assured us that big changes were underway. Few, of course, accepted this view, and most instinctively considered it pro-



paganda as usual. We engaged in an active Q&A session after his remarks, many of the students challenging his assertion.

We left Fort McNair in June 1989, and by November *everything* had changed before the eyes of all the world. In retrospect, it is quite remarkable how our watchers were so systemically unprepared for the events that shook the world only months later.

J. Michael Cleverley
FSO, retired
Leesburg, Virginia

Two Gentlemen from Foggy Bottom

Watching the first session of the impeachment hearings allowed me to recall my assignment to the Board of Examiners to the Foreign Service (1997-2000). Our job was to test candidates who had passed the written exam in a group exercise, a *démarche* with a writing assessment, an interview involving responses to three hypothetical FS-related situations and an exit interview.

Current procedures differ in some respects, but to pass the Oral Assessment each candidate's effort was weighed against a set of "dimensions" deemed essential building blocks for success, but not guarantees.

The dimensions are self-explanatory and familiar to those who went through the testing (and probably to those in other professions that require both trade-craft and interpersonal competence). In actuality, of course, levels of performance vary.

Here are the official dimensions State uses: composure, cultural adaptability, experience & motivation, information integration & analysis, initiative & leadership, judgment, objectivity & integrity, oral communication, planning & organizing, quantitative analysis,

resourcefulness, working with others and written communication.

I have developed a complementary list of my own. After watching two exemplary senior representatives of the Foreign Service, William Taylor and George Kent, in the crucible of the congressional hearing, I conclude they exhibited a number of the new dimensions (as well as the original ones), essential for fulfilling the demands of a Foreign Service career.

My list follows, with some annotation and a grain of salt (but no excess verbiage):

- A moral compass
- Resilience
- Self-discipline
- Circumspection (in all things)
- Flexibility (but not malleability)
- An even temperament with matching sense of humor
- Open-mindedness
- Introspection
- Rhino-thick skin
- A positive problem-solving orientation
- A stress-management strategy
- Common sense at an uncommon level
- Patriotism of the first order
- Compassion

I would note that no FSO has ever possessed all these qualities, but the first one who does may be eligible for canonization. Thomas Paine, however, might have noted that the patriot "who stands by [his country in service] now, deserves the love and thanks of man and woman," which would be an adequate reward for those who do not covet wealth and glory for serving the nation.

David Rabadan
FSO, retired
Annandale, Virginia



Being There

Congratulations to Ambassador Anne Patterson for stating the case that "We Have to Be There" so clearly (September *FSJ*).

Language competency is also a critical enabling factor. When I was director of Foreign Service Institute-Tunis [Arabic field school], I told the students: "They won't invite you to dinner at their house if they have to explain the jokes to you."

Four/four competency (or better) is highly desirable. Armed with that, an officer should be allowed to travel outside the embassy compound, around his or her country of assignment, and without a security follow-car.

True, ambassadors may require special measures, but the reporting officers, including consular and management members, must be able to move freely to cultivate face-to-face relationships with their counterparts and other persons of interest and influence in the country. Only then will we begin to understand the environment we were sent to work in.

Charles O. Cecil
Ambassador, retired
Alexandria, Virginia ■



Share your thoughts about this month's issue.

**Submit letters to the editor:
journal@afsa.org**

Impeachment Hearings: Diplomats Shine

As the House Permanent Select Committee on Intelligence held public hearings in November into whether President Donald Trump committed impeachable offenses related to withholding military aid to Ukraine and a meeting with Ukraine President Volodymyr Zelensky in exchange for political favors, U.S. diplomats were in the spotlight.

Many media outlets applauded the integrity, professionalism and nonpartisanship of the career Foreign Service officers who testified. Former Ambassador to Ukraine Marie Yovanovitch received a standing ovation after testifying before the House Intelligence Committee Nov. 15. (See p. 19 for excerpts from opening statements of several diplomats.)

During the course of the public hearings, AFSA launched an #FSProud social media campaign, and hundreds of diplomats and friends took to Twitter, Facebook, Instagram and other plat-

forms to say why they are #FSProud. (See p. 17 for samples.)

AFSA's Legal Defense Fund, which is used to assist members in cases involving issues of significant institutional importance to the Foreign Service, has generated an outpouring of support from the FS community and the public.

As of Dec. 11, the Legal Defense Fund had collected \$418,465 since the initial solicitation went out Oct. 8. This support came from 2,176 individual donors, for an average donation of \$192. As of press time in mid-December, \$133,000 had been disbursed in support of members.

Meanwhile, the State Department pledged not to punish employees who testified about the Ukraine matter. In a Nov. 18 letter to the ranking member of the Senate Foreign Relations Committee, Senator Bob Menendez (D-N.J.), Under Secretary of State for Management Brian Bulatao wrote: "No employee has faced any adverse action by the Department for testimony before Congress on this matter. The Department will not

discipline any Department employee for appearing before Congress in response to a subpoena."

Mr. Bulatao also said the department would provide limited financial assistance for legal fees incurred by employees.

The public servants who testified offered a civics lesson in how foreign policy is supposed to be managed. In public testimony Nov. 21, Fiona Hill, a Russia expert and senior member of the National Security Council staff, urged lawmakers not to promote "politically driven falsehoods" about Ukraine that create doubt about Russia's attack on U.S. elections.

"The unfortunate truth is that Russia was the foreign power that systematically attacked our democratic institutions in 2016. This is the public conclusion of our intelligence agencies, confirmed in bipartisan congressional reports. It is beyond dispute, even if some of the underlying details must remain classified.

"The impact of the successful 2016 Russian campaign remains evident today. Our nation is being torn apart.

"Truth is questioned. Our highly professional and expert career Foreign Service is being undermined. U.S. support for Ukraine—which continues to face armed Russian aggression—has been politicized," she testified.

The House Intelligence Committee public hearings ended the week before Thanksgiving.

The House Judiciary Committee then held public hearings in early December, and on Dec. 10, it announced two articles of impeachment—abuse of power and obstruction of Congress. The full House will vote on the articles, and if the House votes to impeach the president, the Senate will likely hold an impeachment trial in January.

Site of the Month: *United Nations Peacemaker: peacemaker.un.org*

United Nations Peacemaker is an online support tool for mediators and peacemakers. Developed by the U.N. Department of Political and Peacebuilding Affairs, it includes a database of more than 750 peace agreements, searchable by agreement and by issue; guidance material; information on the U.N.'s peacemaking support services; and a library of



literature on key mediation issues including power and wealth sharing, constitutional issues and mediation strategies.

The website, which was launched in 2006 and relaunched in 2019, features a diplomatic toolkit covering the themes of conflict analysis, engagement with parties, inclusivity and strategic communications.

Lawmakers Form Diplomacy Caucus

Four members of Congress—two Democrats and two Republicans—plan to announce the creation of a Diplomacy Caucus that will bring together House members interested in promoting legislation to strengthen U.S. diplomatic institutions and showcase bipartisan support for diplomacy, *Foreign Policy* magazine reported on Dec. 3.

The Trump administration has repeatedly proposed slashing the budget for diplomacy and foreign aid over the past few years.

“With America’s diplomacy and American diplomats at the center of a lot of the Ukraine scandal [and] the public getting a sense of what these people do in terms

of serving the country, we thought this would be an optimal time to start a bipartisan group that could support American foreign policy,” said Rep. Ami Bera (D-Calif.), one of the founding members of the new caucus.

“Since the beginning of our country’s history, thousands of Americans have put their lives on the line in the name of furthering our nation’s diplomatic mission and hundreds have made the ultimate sacrifice,” said Rep. Brian Fitzpatrick (R-Penn.), another co-founder. “This caucus will provide a stronger voice for them within Congress and help to make the challenges they and their families face a little bit easier,” he said.

Rep. Ann Wagner (R-Mo.), a former ambassador, and Rep. David Cicilline

(D-R.I.) are the other two co-founders.

Foreign Policy reports that the new caucus is entertaining several possible projects to strengthen and modernize the State Department, including “initiatives to help recruit and retain top talent” and “legislation to better support the spouses and family of diplomats serving overseas.”

“With the State Department under attack and in crisis, our diplomatic professionals—both civil service and foreign service—need to know there is broad support for their mission on Capitol Hill as well as an appreciation for the sacrifices they make in order to keep our country strong and secure,” former Secretary of State Madeleine Albright told *Foreign Policy*. “I hope the Diplomacy Caucus will help reassure them of the support they have.”

50 Years Ago

Secretary of State Rogers Comes to AFSA

Secretary [of State William] Rogers spoke to the monthly AFSA luncheon on December 18, 1969.

Most of the Secretary’s remarks were devoted to a review of the international situation. He referred to three developments which are having and will over the next few years continue to have a major effect on the international scene: the Sino-Soviet split, the war in Vietnam and the growing strength of Germany and Japan. These three developments, the Secretary noted, are interrelated. Soviet policies in Europe and Vietnam are affected by their problems with Communist China. The American presence throughout the world is affected by our involvement in Vietnam. All nations have to take into consideration the vitality and potential of Germany and Japan.

The Secretary said that although we are reducing our presence abroad, we can’t become an isolationist nation. He said we will continue to pursue negotiations: as we have been doing on disarmament matters and SALT, on

the Middle East, on Vietnam, and now with Communist China.

Our aim in these negotiations is to reduce tensions. Secondly, he said we will be less strident, believing as we do that we don’t have to try to solve all the problems of the world and that our presence overseas has been too pervasive. Thirdly, the Secretary said we are encouraging our friends and allies to solve more of their problems without our assistance. We are encouraging the development of regional organizations.

In particular, other nations will have to take care of their own insurgencies. We will assist in providing equipment and training, but not with our own troops when other major powers are not involved.

—Excerpted from “Secretary of State Speaks to AFSA Members,” an AFSA News article in the February 1970

Foreign Service Journal.



Contemporary Quote



—U.S. Deputy Assistant Secretary for European and Eurasian Affairs George Kent, testifying during the public impeachment hearings, Nov. 13. Seen here in cross-stitch design as first shared on The Rachel Maddow Show as “Best New Thing in the World Today: Impeachment Embroidery.”

U.S. Reverses Policy on Israeli Settlements

In a major reversal of U.S. policy, Secretary of State Mike Pompeo in a Nov. 18 press conference said that “establishment of Israeli settlements in the West Bank is not, per se, inconsistent with international law.” In 1978 the State Department had determined that the settlements do violate international law, and that remains the international consensus opinion, according to a CNN report.

Secretary Pompeo added that the U.S. government is “expressing no view on the legal status of any individual settlement” or “addressing or prejudging the ultimate status of the West Bank.”

Pompeo stated: “Calling the establishment of civilian settlements inconsistent

with international law hasn’t worked. It hasn’t advanced the cause of peace. The hard truth is there will never be a judicial resolution to the conflict, and arguments about who is right and wrong as a matter of international law will not bring peace. This is a complex political problem that can only be solved by negotiations between the Israelis and the Palestinians.”

In a Nov. 18 statement, the European Union said that its “position on Israeli settlement policy in the occupied Palestinian territory is clear and remains unchanged: all settlement activity is illegal under international law, and it erodes the viability of the two-state solution and the prospects for a lasting peace.”

The E.U. called on Israel to “end all settlement activity, in line with its obligations as an occupying power.”

National Security Needs Diplomats

I rise to speak up for those who serve our country all around the world, courageously, selflessly, with great sacrifice. I rise on behalf of our diplomatic corps, our Foreign Service Officers, civil servants, and State Department personnel. I rise on behalf of patriotic Americans serving our country on the front lines of war zones and devastating conflicts, in countries with oppressive governments and societies hostile to our own.

Our national security is stronger because of them. American people are safer because of them. Our children’s futures will be more secure, more prosperous, because of them. And because of them and their hard work and sacrifice, our grandchildren may know a world with less pain, less strife, less conflict. And yet they have come under attack, simply for serving their country.

—Sen. Bob Menendez (D-N.J.), in a statement on the Senate floor, Nov. 14.

Heard on the Hill



Being There

The State Department is part of the bedrock of our national security. Its diplomats are our eyes and ears on the ground across the globe. These men and women are the tip of the spear for advancing U.S. interests overseas, our first line of defense against malign influences, and a vital lead in negotiations to make sure that our relationships with friends and foes abroad don’t go off the rails. We need to make sure that our diplomats are getting the support they need to get outside the walls of our diplomatic

posts. I can assure you Chinese, Russian and Iranian diplomats don’t have trouble getting off their embassy compounds.

—Chairman Jim Risch (R-Idaho), at the Senate Foreign Relations Committee hearing, “The Future of U.S. Policy Towards Russia,” Dec. 3.

Neither Democrats Nor Republicans

Our diplomats are not Democrats or Republicans; they are fighting for American values.

—Sen. Ben Cardin (D-Md.), at the Senate Foreign Relations Committee nomination hearing for Stephen Biegun, Nov. 20.

Washington Post Publishes “The Afghanistan Papers”

On Dec. 9, *The Washington Post* published “The Afghanistan Papers: A Secret History of the War”—a six-part series of articles detailing how “U.S. officials misled the public about the war in Afghanistan,” according to confidential U.S. government documents the *Post* obtained.

“U.S. officials constantly said they were making progress. They were not, and they knew it,” according to the *Post*.

The *Post* fought a three-year legal battle against the U.S. government to win release of more than 2,000 pages of “Lessons Learned” interviews of more than 400 people, including generals, ambassadors, diplomats and more, conducted by the Office of the Special Inspector General for Afghanistan Reconstruction.

One of the main themes that emerged from the papers, according to the *Post*, is that “year after year, U.S. officials failed to tell the public the truth about the war in Afghanistan.”

Another is that “the United States wasted vast sums of money trying to remake Afghanistan and bred corruption in the process.”

You can access the six-part series, as well as all of the released interviews, at bit.ly/afghan-papers.

Pay to Play 2.0

Like Gordon Sondland, Pres. Trump’s ambassador to the European Union, San Diego real estate developer Doug Manchester (who likes to be called “Papa Doug”) donated \$1 million to the president’s inauguration fund. The president nominated him for an ambassadorship to Nassau the day after taking office.

But the nomination then stalled in the Senate for more than two years. Then



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when Hurricane Dorian ravaged the Bahamas in September 2019, Manchester loaded up his private jet with supplies and headed for the hard-hit Caribbean country, where he owned a home.

The outreach worked—at least at first. Pres. Trump tweeted, “I would also like to thank ‘Papa’ Doug Manchester, hopefully the next ambassador to the Bahamas, for the incredible amount of time, money and passion he has spent on helping to bring safety to the Bahamas.”

Three days after that presidential tweet, Republican National Committee Chairwoman Ronna McDaniel hit up Manchester in an email (obtained by CBS News) requesting a half-million-dollar donation.

According to CBS, Manchester promptly wrote back that while he’s not supposed to make donations, his wife was sending a \$100,000 donation—and more would follow if his confirmation came through.

The gambit might have worked had Manchester not copied staffers of two senators who controlled his nomination, Kentucky’s Rand Paul and Idaho’s Jim Risch. Sen. Risch alerted the White House, which then asked Manchester to withdraw. He did, whereupon the RNC refunded his wife’s donation.

Publicly, the erstwhile ambassador was philosophical about the debacle, telling CBS News: “Hey, listen—politics is politics.”

China Takes First Place in Number of Diplomatic Missions Abroad

China now has the most diplomatic missions in the world, overtaking the United States, according to the Lowy Global Diplomatic Index.

The index, released Nov. 27 by the Lowy Institute, an independent Australian think tank, reveals that China has 276 posts worldwide to the United States’ 273.

ON THE CAMPAIGN TRAIL

If we’re serious about reforming our democracy and taking money out of politics, it means eliminating the pay-to-play practices that have dominated diplomatic appointments in both parties. In my administration, only those most-qualified people will be considered for ambassadorships and appointments—not wealthy donors or big bundlers.

—Former Housing and Urban Development Secretary and presidential candidate Julián Castro, Nov. 22.

China’s “ascent to the top spot has been rapid,” Bonnie Bley, Lowy Institute’s lead researcher, said in the report. In 2016, China was in third place behind the United States and France.

“China has overtaken the United States to have the largest diplomatic network globally, while U.S. diplomacy has entered a period of limbo,” Bley said.

The United States remains the most popular country to host diplomatic missions from other countries. The U.S. is home to 342 diplomatic posts, according to the institute. China is second with 256.

Bias in USAID Funding?

In November the investigative journalism nonprofit ProPublica published the results of its examination of allegations that U.S. aid has become politicized.

ProPublica viewed internal governmental emails and conducted interviews with nearly 40 current and former U.S. officials and aid professionals to document political pressure, particularly from the office of Vice President Mike Pence, on deliberations on U.S. aid in the Middle East. Most contacts spoke on the condition of anonymity.

The findings indicate that increasingly, allocation decisions are not being governed by career professionals applying a rigorous review of applicants and their capabilities. Instead, the Trump administration is steering funding to Christian

communities in the Middle East.

In October, for example, at the behest of political appointees, USAID announced two grants to Iraqi organizations that career officials had previously rejected. One of the groups has no full-time paid staff, no experience with government grants and a financial tie that would typically raise questions in an intense competition for limited funds.

These developments have sparked concern among career USAID officials, who worry that the agency risks violating constitutional prohibitions on favoring one religion over another. They also worry that being perceived as favoring Christians could worsen Iraq’s sectarian divides.

“There are very deliberate procurement guidelines that have developed over a number of years to guard precisely against this kind of behavior,” notes Steven Feldstein, a former State Department and USAID official. When politics intrude on the grant-making process, “you’re diluting the very nature of what development programs ought to accomplish.”

Asked for comment, Pence’s press secretary, Katie Waldman, said: “The vice president is always proud to support religious freedom, both here at home and abroad.”

This edition of Talking Points was compiled by Cameron Woodworth, Steve Honley and Shawn Dorman.



We Are All #FSProud

In mid-November, during impeachment proceedings that included testimony from several Foreign Service officers, AFSA asked members of the Foreign Service community to post to Twitter why they are **#FSProud**. Hundreds of diplomats and friends responded, and the hashtag continues to be used on Twitter as well as Facebook and other social media outlets. Following is a sampling of the tweets.

Edgard Kagan @edgardkagan



I joined the Foreign Service almost 29 years ago. I have served the United States at eight overseas posts in seven countries, working for five Presidents and 10 Secretaries of State. I am proud of my colleagues, who inspire me with their dedicated service. **#FSProud**

Susan Reichle @SusanReichle



Walking into @USAID headquarters & seeing the names of my colleagues who made the ultimate sacrifice etched into the wall is a reminder of why I'm **#FSProud**

Linda Thomas-Greenfield @LindaT_G



#FSProud! I am **#FSProud** to have served in the Foreign Service with patriotic colleagues like Ambassadors Yovanovitch and Taylor as well as others who have put their lives and reputations on the line in the name of freedom.

Laura Kennedy @AmbKennedy_ret



I hope all Americans join me in being **#FSProud** that our Foreign Service is composed of outstanding, nonpartisan public servants like Ambassador Masha Yovanovitch who have dedicated their lives to serving their country.

Madeleine Albright @madeleine



In an otherwise dark moment for our country, I have been inspired by the selfless service of George Kent, Bill Taylor, Marie Yovanovitch who this week refused to be intimidated and did their duty to defend the truth and uphold the constitution. I am truly **#FSProud**

Nicholas Burns @RNicholasBurns



I am **#FSProud** of George Kent, Masha Yovanovitch, Bill Taylor and Mike McKinley for their patriotism. They were true to their oath of office in choosing to testify before Congress against the wishes of the White House and Secretary of State. These four are profiles in courage.

Joseph Nye @Joe_Nye



#FSProud. This week was a public tutorial on non-partisan service to the nation. Leadership came from the foreign service, not the politicians!

Deborah A. McCarthy @AMB_DMcCarthy



It is about time that our diplomats, who work to protect our country & uphold the Constitution, be given the same respect & consideration as our military colleagues. The latter are our close colleagues & support us. I hope that others can do the same. **#FSProud**

Amb. Deborah Malac @USAmbUganda



#FSProud #FSStrong Proud to advance the cause of freedom for more than three decades. Together we can make a difference.

Julieta Valls Noyes @JVNoyes



I became an American diplomat to thank this great nation, a beacon of hope for the world, for taking in my parents when they fled communism & oppression. US diplomats advance our nation's security, prosperity & values. I am honored to be one of them. **#FSProud**

Samantha Power @SamanthaJPower



Having worked with so many incredibly talented Foreign Service members, I will forever be **#FSProud**—of their professionalism, their patriotism, their commitment to service, and critically, of the conviction they bring to the very human endeavor of diplomacy.



We Are All #FSProud

Tamara Cofman Wittes @tcwittes



So moving to read the **#FSProud** tweets from US Foreign Service folks today, telling their stories of working on our behalf around the world. I'm the daughter of a career FS officer, & a former **@StateDept** appointee who worked alongside stellar career officers; I too am **#FSProud**

Patrick Theros @PNT_Gulf



#FSProud It's been twenty years since I retired but **#YovanovitchIsAPatriot** and her colleagues have done more to teach Americans about the **#ForeignService** in a week than we managed in years.

Earl Anthony Wayne @EAnthonyWayne



Having served every president from Ford to Obama, I am grateful that my other Foreign Service colleagues and I did our best to defend our constitution and our nation whether or not we personally agreed with a policy. Our duty was to the constitution and to our country. **#FSProud**

David Frost @WD_Frosty



I serve my country to the best of my ability, sometimes to the detriment of my health and well-being. I work long hours to pursue the foreign policy of the United States. I have been **#FSProud** for 8 years, 5 moves, 3 foreign countries, 2 Presidents, 4 Secs of State.

Rob Joswiak @RobJoswiak



I am **#FSProud** because Americans abroad need assistance. Because millions of visitors and immigrants need visas. Because diplomacy is vitally important to our nation and world peace. Because I cannot imagine doing anything else. Much ♥

Elizabeth Power @elizabethcpower



21 years in and I still get a thrill at the honor of serving the U.S. overseas with so many dedicated Foreign Service colleagues. As our oath states, we work to support and defend the Constitution, bearing true faith and allegiance to the same. **#FSProud**

M. Andre Goodfriend @GoodfriendMA



#FSProud to be part of a team in service to America, whatever administration, that exemplifies professionalism, safeguarding the welfare of our citizens and upholding our country's interests and values, whether all is calm or under fire.

Kristin Duckworth @KMDuckworth



Representing our country overseas and seeing the sacrifice, service, commitment, and integrity of our Foreign Service (and FS families!) makes me **#FSProud**. The relationships our diplomats build and the experience and knowledge they bring are irreplaceable. **@afsatweets**

Judy Kuo @judykuokhoa



Diplomatic service is a noble calling that demands patriotism, integrity, dignity, & resilience against adversity. The reward is the chance to help make history, improve lives, & represent the vibrant & diverse democracy that is **#America**. This is why I am **#FSProud**.

Steven Pifer @steven_pifer



Hugely proud of integrity, professionalism & sense of duty shown by my former colleagues Masha Yovanovitch, Bill Taylor & George Kent in Congressional hearings. Will be contributing to <http://afsa.org/donate> to help defray private legal expenses of career diplomats. **#fsproud**

Dana Shell Smith @AmbDana



I am **#FSProud** to have served our country for 25 years alongside some of the smartest and most dedicated people in the world. Including Ambs Yovanovitch, Taylor and so many more.

Mike Hammer @MikeHammerUSA



For 31 years I have been **#FSProud** to represent & advance America's interests as a Foreign Service Officer. Serving abroad often in hardship, under threat, away from family, we promote freedom, peace, human rights, the rule of law & US business around the world. **#Patriots**

Diplomats Testify as Witnesses in the Impeachment Hearings

Excerpts from Opening Statements

Ambassador William Taylor

I want to emphasize at the outset that, while I am aware that the committee has requested my testimony as part of impeachment proceedings, I am not here to take one side or the other, or to advocate for any particular outcome of these proceedings. My sole purpose is to provide facts as I know them about the incidents in question as well as my views about the strategic importance of Ukraine to the United States. ...

I am non-partisan and have been appointed to my positions by every president from President Reagan to President Trump. ...

Ukraine is important to the security of the United States. The largest country in Europe by land mass, Ukraine is a young democracy, struggling to join Europe and ally itself with the United States. ...

Mr. Chairman, there are two Ukraine stories today. The first is the one we are discussing this morning and that you have been hearing for the past two weeks. It is a rancorous story about whistleblowers, Mr. Giuliani, side channels, quid pro quos, corruption, and interference in elections. In this story Ukraine is merely an object.

But there is another Ukraine story—a positive, bipartisan one. In this second story, Ukraine is the subject. This one is about young people in a young nation, struggling to break free of its past, hopeful that their new government will finally usher in a new Ukraine, proud of its independence from Russia, eager to join Western institutions and enjoy a more secure and prosperous life. This story describes a nation developing an inclusive, democratic nationalism, not unlike what we in America, in our best moments, feel about our diverse country—less concerned about what language we speak, what religion if any we practice, where our parents and grandparents came from; more concerned about building a new country.

—Acting U.S. Ambassador to Ukraine William B. Taylor, before the House Permanent Select Committee on Intelligence, Nov. 13, 2019.

FSO George Kent

I have served proudly as a non-partisan career Foreign Service officer for more than 27 years, under five Presidents, three Republicans and two Democrats. ... I represent the third generation of my family to have chosen a career in public service and sworn the oath all U.S. public servants do, in defense of our Constitution. ...

I begin with some opening comments on the key prin-

ciples at the heart of what brings me before you today. To wit: principled public service in pursuit of our enduring national interests, and the place of Ukraine in our national and security interests. ...

... You don't step into the public arena of international diplomacy in active pursuit of principled U.S. interests without expecting vigorous pushback, including personal attacks. Such attacks came from Russians, their proxies, and corrupt Ukrainians. This tells me that our efforts were hitting their mark.

It was unexpected, and most unfortunate, to watch some Americans—including those who allied themselves with corrupt Ukrainians in pursuit of private agendas—launch attacks on dedicated public servants advancing U.S. interests in Ukraine. In my opinion, those attacks undermined U.S. and Ukrainian national interests and damaged our critical bilateral relationship.

The United States has clear national interests at stake in Ukraine. Ukraine's success is very much in our national interest, in the way we have defined our national interests broadly in Europe for the past 75 years. U.S. leadership furthered far-sighted policies like the Marshall Plan and the creation of a rules-based international order. Protected by the collective security provided by NATO, Western Europe recovered and thrived after the carnage of World War II, notwithstanding the shadow of the Iron Curtain. Europe's security and prosperity contributed to our security and prosperity.

—Deputy Assistant Secretary of State for European and Eurasian Affairs George P. Kent, before the House Permanent Select Committee on Intelligence, Nov. 13, 2019.

Ambassador Marie Yovanovitch

As I close, let me be clear on who we are and how we serve this country. We are professionals, public servants who by vocation and training pursue the policies of the President, regardless of who holds that office or what party they affiliate with. We handle American Citizen Services, facilitate trade and commerce, work security issues, represent the U.S., and report to and advise Washington, to mention just a few of our functions.

And we make a difference every day.

We are people who repeatedly uproot our lives, who risk—and sometimes give—our lives for this country.

We are the 52 Americans who 40 years ago this month began 444 days of deprivation, torture and captivity in Tehran.

We are the dozens of Americans stationed at our embassy in Cuba and consulates in China, who mysteriously and

dangerously—and in some cases perhaps permanently—were injured in attacks from unknown sources several years ago.

And we are Ambassador Chris Stevens, Sean Patrick Smith, Ty Woods, and Glen Doherty—people rightly called heroes for their ultimate sacrifice to this nation’s foreign policy interests in Libya, eight years ago.

We honor these individuals. They represent each one of you here—and every American. These courageous individuals were attacked because they symbolized America.

What you need to know, what the American people need to know, is that while, thankfully, most of us answer the call to duty in less dramatic ways, every Foreign Service Officer runs these same risks. And, very often, so do our families. They serve too. As individuals, as a community, we answer the call to duty to advance and protect the interests of the United States.

We take our oath of office seriously, the same oath that each one of you take, “to support and defend the Constitution of the United States against all enemies, foreign and domestic” and to “bear true faith and allegiance to the same.”

I count myself lucky to be a Foreign Service Officer, fortunate to serve with the best America has to offer, blessed to serve the American people for the last 33 years.

—Ambassador Marie Yovanovitch, before the House Permanent Select Committee on Intelligence, Nov. 15, 2019.

FSO David Holmes

I am an apolitical foreign policy professional, and my job is to focus on the politics of the country in which I serve so that we can better understand the local landscape and better advance U.S. national interests there. ...

Earlier this year, large majorities of Ukrainians again chose a fresh start by voting for a political newcomer as president, replacing 80 percent of their parliament, and endorsing a platform consistent with our democratic values, reform priorities, and strategic interests. ...

How we respond to this historic opportunity will set the trajectory of our relationship with Ukraine and will define our willingness to defend our bedrock international principles and our leadership role in the world. ...

Ukrainians cherish their bipartisan American support that has sustained their Euro-Atlantic aspirations, and they recoil at the thought of playing a role in U.S. domestic politics or elections. At a time of shifting allegiances and rising competitors in the world, we have no better friend than Ukraine—a scrappy, unbowed, determined, and above all dignified people who are standing up against Russian authoritarianism and aggression.

They deserve better.

We are now at an inflection point in Ukraine, and it is critical to our national security that we stand in strong support of our Ukrainian partners. Ukrainians and freedom-loving people everywhere are watching the example we set of democracy and the rule of law.

—U.S. Embassy Kyiv Political Counselor David A. Holmes, before the House Permanent Select Committee on Intelligence, Nov. 21, 2019.

Ambassador Mike McKinley

The timing of my resignation was the result of two overriding concerns: the failure, in my view, of the State Department to offer support to Foreign Service employees caught up in the impeachment inquiry; and, second, by what appears to be the utilization of our ambassadors overseas to advance domestic political objectives.

I have served my country loyally for almost four decades in difficult environments. I’ve served as Ambassador to some of our largest missions in the world, including Peru, Colombia, Brazil, and Afghanistan. ...

I know there are difficult choices and compromises to be made on many of the issues we work. I also know that, as a Foreign Service officer, it is my duty to serve the incumbent administration faithfully, consistent with my oath to the Constitution. It was, therefore, also my duty to resign when I felt I could no longer do so. ...

On Saturday, September 28, I sent an email to senior officials proposing a strong and immediate statement of support for Ambassador Yovanovitch’s professionalism and courage, particularly to send a message to Department employees that leadership stood behind its employees in this difficult moment. I was told that the decision was not to issue a statement. ...

Realizing that there was no change in the handling of the situation and that there was unlikely to be one, I decided to step down. I informed the Secretary on September 30 ...

No one wants to end a career on this note. ... Under current circumstances, however, I could no longer look the other way as colleagues are denied the professional support and respect they deserve from us all.

—Michael McKinley, former ambassador and senior adviser to Secretary of State Mike Pompeo, during closed testimony before the House Permanent Select Committee on Intelligence, Oct. 16, 2019.

Truth and Honor

BY HARRY KOPP

The wave of truth-telling by government employees, in defiance of a White House order not to cooperate with the House impeachment inquiry, stunned *The New Yorker's* Susan B. Glasser. “This,” she wrote, “is bravery of a sort that has become so rare in our public life as to be almost unimaginable.”

Whether Ms. Glasser’s judgment is correct depends on the reach of one’s imagination, but there should be no debate about the bravery, or the rarity.

In August 2019 a public servant who saw something wrong blew the whistle and called a foul. The whistleblower’s complaint dealt with the president’s apparent linkage of military aid to Ukraine to that government’s willingness to state publicly its intention to investigate (a) activities in Ukraine of former Vice President Joe Biden and his son Hunter and (b) alleged Ukrainian interference in the 2016 U.S. election.

By October the House of Representatives had opened its impeachment inquiry, which White House Counsel Pat Cipollone tried to kill in its cradle: “President Trump and his Administration,” he wrote to the House, “reject your baseless, unconstitutional efforts to overturn the democratic process. ... President Trump cannot permit his Administration to participate in this partisan inquiry under these circumstances.”



Former Foreign Service Officer Harry Kopp is a frequent contributor to the FSJ and a member of its Editorial Board.

Yet the witnesses kept coming, responding to congressional subpoenas: Foreign Service officers, military officers, members of the Civil Service, noncareer professionals and even some political appointees testified before the House Intelligence Committee.

In so doing, they stayed true to their oath to support and defend the Constitution of the United States against all enemies, foreign and domestic. But at a cost: they risked their careers and brought down upon themselves a torrent of insults, lies and threats, some of which came from the president of the United States. The endpoint of their action remains unknown.

The Foreign Service, Civil Service and armed services all recognize that elected officials, who take the same oath to support and defend the Constitution, derive political authority directly from the people. That authority is to be respected and deferred to: We do not have a government of a million Supreme Court justices, each understanding the Constitution in their own way. If the bravery shown by the officials who have testified is rare, it is because a conflict of the sort that now divides the government is rare. So rare, in fact, that it is tempting to say we have never seen anything quite like it.



Tempting, but wrong. Comparisons can be drawn between the present situation and the period, roughly from 1947 to 1954, when the State Department generally, and the U.S. Foreign Service in particular, were accused of acting against U.S. interests

and placing national security at risk. The accusations then came from the legislative branch; and although they were bipartisan, the charges leveled by Republican members, principally Senator Joseph McCarthy of Wisconsin, are most remembered for their ferocity and recklessness.

McCarthy’s attacks on State were part of a long American history of intermittent, frenzied searches for radicals plotting to subvert the country or sell it out to foreign powers. Between 1900 and 1940, government inquisitors had gone after anarchists, socialists, syndicalists, Bolsheviks and, briefly, Nazis. After the war, Senator William Jenner (R-Ind.) wanted to “impeach President [Harry] Truman and find out who is the secret invisible government.” Today’s nightmarish vision of a “deep state” of conspirators with vague but malevolent aims fits squarely in this tradition.

Joe McCarthy was no thinker. As Robert Griffith wrote, he did not attack ideas, he attacked people—with invective, innuendo, lies and nicknames. He warned of “a conspiracy so immense and infamy so black as to dwarf any previous such venture in the history of man.” He called General of the Army and Secretary of Defense George C. Marshall Jr. “a pathetic thing ... completely unfit” for office, an “instrument of the Soviet conspiracy,” a man who had “an affinity for Chinese Reds.” Secretary of State Dean Acheson, a natty dresser, was the “Red Dean of Fashion” (a poor rhyme with Acheson).

McCarthy blamed the Department of State and the Foreign Service for the

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What sets the present situation apart from the McCarthy era is not the bravery of the officials who speak out but the support they are receiving from their colleagues, from many members of Congress and from the public.

communist victory in China's civil war. The staff of State's Far Eastern Division—today's Bureau of East Asian and Pacific Affairs—were “individuals who are loyal to the ideals and designs of communism rather than those of the free, God-fearing half of the world.” He accused Foreign Service officers who had served in China of disloyalty and treason, citing against them their knowledge of and contacts with actual Chinese communists.

Almost without exception, the department failed to defend its people. Instead, it pursued them with multiple, largely bogus investigations. Some of the China specialists—there were 13, almost all of whom spoke Chinese—were fired without pension, their reputations smeared. Those who remained in the Service were never allowed again to work in or on Asian affairs. Their knowledge and experience were lost to the country, and for years no one dared take their place.

McCarthy had broad support in the Republican Party, including Senators William Jenner and Styles Bridges of New Hampshire and Pat McCarran of Nevada. Even Senator Robert Taft of Ohio, the tallest pillar in the Republican establishment, bought into the lie, decrying “a pro-Communist group in the State Department who ... promoted at every opportunity the Communist cause in China.”

McCarthy's charges of disloyalty were intertwined with a campaign to rid the State Department of “sexual perverts”—gay men, and a very few gay women—who were said to be vulnerable

to blackmail and therefore security risks. David Johnson, in his invaluable book *The Lavender Scare* (2006), writes that “the constant pairing of ‘Communists and queers’ led many to see them as indistinguishable threats.” Senator Bridges argued that homosexuals in the State Department “did not get there by osmosis, or by accident. They got there because Russia wanted them there.”

Although Secretary of State Dean Acheson (1949-1953) defended State's people as “honorable, loyal and clean-living American men and women,” the department's leadership for the most part joined in the persecution. Acheson's Deputy Under Secretary for Management, Carlisle Humelsine, told a congressional committee that “in the public mind, [homosexuality] seems to be a psychological illness or sickness generally associated with the Foreign Service and the Department of State.” Between 1950 and 1953, according to the department's official History of the Bureau of Diplomatic Security, State's security office had 610 employees fired as alleged homosexuals, and another 117 fired for all other reasons.



Ambassador (ret.) William J. Burns, in an article published online in *Foreign Affairs* on Oct. 14, compared the leadership of the Department of State today to that of the McCarthy era and found them equal in spinelessness. There will be no argument here with that judgment.

What sets the present situation apart

from the McCarthy era is not the bravery of the officials who speak out—for those persecuted by McCarthy and his supporters were also brave—but the support they are receiving from their colleagues, from many members of Congress and from the public. That support gives hope to and for the Foreign Service and American government.

The targets of slander and persecution in the McCarthy era were isolated, with

nowhere to turn. Gay men and women had no friends in politics and no support in society. Their colleagues at work were encouraged to denounce them, often anonymously, to the security office. Whether the accusations were true or false, when pressed to resign, nearly all did so, and quietly. No newspaper took up their cause. Only the very well-connected could stifle and survive such attacks.

From the FSJ Archive

The Foreign Service Journal published a number of articles and editorials on the events of the McCarthy era. To retrieve them, go to <http://www.afsa.org/fsj-special-collections#ibmch>.

- “Stout Hearts Required,” editorial, April 1950
- “Tydings Committee Report,” AFSA News, August 1950
- “Career vs. Conscience,” editorial, July 1951
- “...Pertinent Excerpts...,” John S. Service, October 1951
- “The Service Case,” editorial, January 1952
- “Truth Pursues,” editorial, February 1952
- “Report on the Service Case,” AFSA News, May 1952
- “The Meaning of the Ruling in the Vincent Case for the National Interest and the Foreign Service,” editorial board of *The Foreign Service Journal* and board of directors of AFSA, January 1953
- “John Carter Vincent,” editorial, April 1953
- “Bohlen Debate,” Lois Perry Jones, May 1953
- “Why Policy Makers Don’t Listen,” Barbara Tuchman, March 1973
- “China and the Foreign Service, January 1973,” William Harrop, March 1973
- “Foreign Service Reporting,” John Service, March 1973
- “Only in Rejection Could There Be Vindication,” John S. Service, March 1974
- “On All the Evidence,” O. Edmund Clubb, December 1974
- “The Case of John Paton Davies, Jr.,” James Fetzer, November 1977
- “The McCarthy Years Inside the Department of State,” John W. Ford, November 1980
- “Stand By Your Man: Caroline Service Talks about the Trials and Tribulations of a Foreign Service Wife,” Jewell Fenzi, July 1994
- “John S. Service: A Cold War Lightning Rod,” Hannah Gurman, November 2010
- “The McCarthy Witch Hunt: Who ‘Lost’ China?,” John S. Service (excerpts), March 2014

—Compiled by FSJ Publications Coordinator Dmitry Filipoff



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The China hands and others accused of disloyalty fought back, but for the most part they fought alone. John (Jack) Service, John Carter Vincent, O. Edmund Clubb, John Paton Davies Jr., John Emmerson and the others spent years enmeshed in hearings on the Hill and multiple administrative loyalty investigations and reviews in the executive branch.

Jack Service was arrested in 1945 and charged with passing classified information (some of his own reports from China) to a journalist. A grand jury refused to indict him, by a vote of 20-0. He was then cleared of disloyalty in at least eight investigations by loyalty boards at State. Secretary of State John Foster Dulles fired him in 1951. Reinstated by a Supreme Court decision in 1957, he was assigned to Liverpool and retired in 1962. John Paton Davies passed nine security reviews, but Secretary Dulles fired him anyway in 1954. Others had similar experiences.

Members of the Foreign Service facing dismissal for disloyalty or as security risks had nowhere to turn. The American Foreign Service Association acted then as part of management: it offered no help and little sympathy. Its chairmen and presidents issued no statements and made no speeches; its executive committees and boards of directors passed no resolutions; and the minutes of their meetings record no discussions of the wreckage being visited upon the Service. (*The Foreign Service Journal*, however, published a number of editorials and articles in support of the China hands—see p. 23 for a list. The AFSA Board of Directors signed on to the editorial of January 1953.)

Today's situation is different. The threat to the integrity of American foreign policy—and to the integrity of the foreign-affairs professionals of the

Foreign Service, Civil Service and armed services—is widely recognized. The disparagement and belittling of expertise, the attacks on the competence and loyalty of particular individuals, the substitution in foreign affairs of private parties with obscure motives and paymasters for sworn and commissioned officers of the United States are widely challenged.

Those under fire have the support of their colleagues. “We have your back, and we will assist and defend you when you need help,” AFSA President Eric Rubin wrote not long ago in these pages. AFSA has in-house counsel and a legal defense fund, supported by donations, for this purpose.

There is broad support, too, from much of the media and the public. Witnesses can speak with candor to committees of Congress.



The lessons of history are often lessons we already knew but need to be taught again and again. Among the lessons of the McCarthy era are that demagogues and bullies can be stopped but not appeased, and that their damage to people and institutions endures long after they have lost their grip on public attention.

President Truman established, and President Eisenhower expanded, loyalty and security boards that subjected millions of employees to investigation, yet the Republican right was not appeased. Hundreds of people were fired, yet cries of perfidy and perversion did not diminish. McCarthy was stopped only when he attacked a target—the United States Army—with the heft and will to fight back. At last, in 1954, many of his friends deserted him. He lost a vote of censure in the Senate, and his power rapidly evaporated.

The assault on the China hands, and on men such as General Marshall and Secretary Acheson, was an assault on knowledge, honesty, complexity and seriousness. George Kennan, a pessimist who was rarely disappointed, wrote in 1955 that “the postwar security programs” had brought “humiliation, bewilderment and the deepest sort of discouragement to hundreds of [Foreign Service] officers.” Fear of challenging accepted opinion, or reporting bad news, entered State Department culture and lingered for years. McCarthy, said another writer, was “like a flashbulb witnessed up close, seen much later when one’s eyes were closed.”



In time the era passed. In January 1973, AFSA’s board of directors held a luncheon in the ceremonial space of the eighth floor of the Department of State to honor the China hands. As *The Foreign Service Journal* reported, 300 places were reserved in a week, and another 500 seats were taken up in an auditorium to hear the speakers, John Service and historian Barbara Tuchman. Television networks filmed the event and broadcast it nationally.

Press coverage was extensive—“Honor Came a Bit Late” said *The New York Times*. Ms. Tuchman said of the honorees: “Your colleagues and predecessors were hounded because able and honest performance of their profession collided with the hysterics of the cold war, manipulated by a man so absolutely without principles as to be abnormal.”

When Ms. Tuchman spoke, the McCarthy era was close to 20 years in the past. Today’s honest performers and truth tellers will not have to wait 20 years for the honor they deserve. We honor them now. ■

Teaching Diplomacy Today

Post-Foreign Service Opportunities in Academia

BY JILLIAN BURNS AND MARK C. STORELLA

As you contemplate life after the Foreign Service, you may be thinking of alternative public service to give back to your community. One option that draws directly on your FS experience is teaching diplomacy and international affairs. If you are lucky, you may inspire a few young adults to pursue careers in international relations, including at the Department of State. Just as important, you might help a broader audience understand the critical links between U.S. foreign and domestic policy and future global challenges. In doing so, you will likely expand understanding of the valuable role played by the State Department, including the U.S. Foreign Service, in keeping our country safe, prosperous and free.



Jillian Burns answers a question from the moderator at AFSA's first "Next Stage" panel, "Teaching International Affairs and the Art of Diplomacy," in March 2019.

AFSA/DONNA GORMAN

As a Foreign Service officer, you are often asked what inspired you to pursue a career as a diplomat. For many, our inspirations include teachers in high school or college who taught us about the critical role that the United States plays in the world and encouraged us to pursue public service. A few of us may have been fortunate enough to have classes with a retired foreign policy practitioner, who could fill in some of the gaps from our theory classes, as well as give career advice on how to get started. (For co-author Jillian Burns, that mentor was the late Ambassador Jack Perry at Davidson College.)

Students (and employers) value an education that includes both practice and theory. FSOs bring deep regional or functional knowledge of how the world works, from the Southern Cone to the Southern Command, from oil markets to oil kingdoms. FSOs understand from firsthand experience the diversity of tools we as a nation can deploy to advance U.S. interests. We grasp intuitively why and when nations opt for economic instruments, gunboat diplomacy, public diplomacy, development and even global health diplomacy to advance their goals. FSOs have participated in real-life case studies when multilateralism served the country well, and when unilateral action was the better option. They also understand the risks

U.S. officials confront daily in their work around the world.

FSOs also have a lot to offer students seeking a broad range of careers, as diplomats are well practiced in the critical skills—oral and written communication, including advocacy and negotiations; analysis; teamwork; management; and so on—needed for successful careers in business, law, journalism, civil society and other fields.

In academia, you will almost certainly find satisfaction in students' profound interest in how diplomacy is actually practiced, and the commitment younger generations express for public service. The idealism of many students will remind you of what prompted you to launch your own Foreign Service career.

Challenges of Teaching

If you are depending on a lucrative post-FS career to pay for your kids' stratospheric college tuition, teaching may not be for you. Teaching is typically poorly remunerated, particularly for

adjunct faculty. (According to the Glassdoor job search website, the national average salary in 2019 for an adjunct professor is \$20,394.) Adjunct faculty are often paid between \$4,000 and \$7,500 per course they teach, hardly a living wage. Teaching, like government service, requires a degree of altruism.

Finding teaching positions, especially full-time appointments, can be daunting. While you do not have to be an ambassador or

have a Ph.D. to be marketable, those qualifications can help.

Teaching may also require new skills—abstract skills to facilitate learning, such as designing effective assignments and tests, and tactical skills such as mastering PowerPoint, running class simulations and spotting aca-

ademic dishonesty. Todd Kushner, a retired FSO who teaches as a contract faculty member at National Intelligence University, recommends *The Chronicle of Higher Education's* free weekly newsletter, "Teaching," which provides advice on teaching methodologies.

You may also need to draw on that classic FSO skill of getting up to speed quickly on an issue if you are asked to teach a course on a region or topic that is new to you. Luckily, you can draw on your myriad contacts throughout government to help you fill those gaps; guest speakers are an important way to jazz up a course. Students highly value hearing from practitioners with up-to-date experience in the issues at hand.

If you are lucky enough to land a full-time academic position, you may be struck by the sometimes-daunting inefficiency, balkanization, tight budgets and understaffing of many American universities. Your FSO cultural adaptation skills will serve you well to navigate the political sensitivities in this unique setting.

You should embark on teaching diplomacy with your eyes wide open to both the challenges and opportunities academia presents.

Jillian Burns retired from the Foreign Service in 2014, after serving for 21 years as a political officer. Her overseas tours included Poland, Jordan, the UAE and Afghanistan, where she was the consul in Herat. In Washington, she served as a watch officer and senior watch officer in the Operations Center; on the Syria desk, the Iran desk and in the Office of Policy Planning; and as director of the Middle East Office in the Department of Democracy, Human Rights, and Labor. Prior to joining the Foreign Service, she taught communications at Georgia Southern University. Since retiring, she has taught as an adjunct instructor at The George Washington University in the political science department and the Elliott School of International Affairs. She also teaches at the Foreign Affairs Counter Threat training program.

Senior Foreign Service Officer Mark C. Storella is dean of the Leadership and Management School at the Foreign Service Institute. He was a Senior Department of State Fellow at Georgetown University (2018-2019), where he taught courses on diplomatic tradecraft and on humanitarian issues. And as a dean and Virginia Rusk Fellow (2001-2003), he taught at Georgetown as an adjunct professor. He served as deputy assistant secretary for the Bureau of Population, Refugees and Migration (2016-2018), deputy chief of mission in Brussels (2013-2016) and U.S. ambassador to Zambia (2010-2013). Other overseas postings include Baghdad, Geneva, Phnom Penh, Paris, Rome and Bangkok.

Jane Zimmerman, retired FSO

Current position: Started summer 2019 as John and Ruth McGee Director of the Dean Rusk International Studies Program, Davidson College, Davidson, North Carolina.

How she found the job:

- **Through her network of contacts.** The Davidson College search committee reached out to Georgetown University. Davidson alumna Jillian Burns was invaluable in helping her prepare for an opportunity in higher education, McGee says.
- **Global Jobs and Devex.** She notes the importance of search terms you select; she used “professor of practice.”

Responsibilities:

- 75 percent programming, advising, networking for the college.
- 25 percent teaching.
- 100 percent for the students.

Her first class: “Diplomacy in the First Person,” using Association for Diplomatic Studies and Training oral histories and memoirs of foreign policy practitioners, focusing on how to think strategically and ethically in difficult moments when there are no good options.

Her mission: Paying it forward for the next generation, which interconnects with Davidson’s mission of “developing humane instincts and disciplined and creative minds for lives of leadership and service.”



Observations on teaching today: “Our students want to save the world, and they definitely see a career in the Foreign Service and government as a great way to do that. The recruiting visit of our region’s Diplomat-in-Residence was oversubscribed.

“Students want to engage with their professor, guest speakers and, especially, each other in exploring the concepts in the assignments. I receive tremendous support from fellow faculty and the college to innovate and improve my teaching. The librarians will become your best friends, along with the IT staff.”

Advice to FSOs thinking about teaching:

“Get on LinkedIn and join the group Foreign Policy Practitioners–Educators Network. It offers resources, ideas and community. Also, look on YouTube at AFSA’s ‘Next Stage’ panel on ‘Teaching International Affairs and the Art of Diplomacy.’ You may have left the Foreign Service, but your Foreign Service family is still there for you.”

In short, teaching international affairs may be the perfect follow-on career for some FSOs, but it can be challenging to find opportunities, particularly well-paid options.

Types of Positions and Employers

There are basically three types of positions available in higher education.

Adjunct or part-time instructor. Effectively a contractor, an adjunct or part-time instructor is paid per course. According to the American Association of University Professors, more than half of all faculty appointments are now part-time. While adjuncts are usually freed from other academic duties—e.g.,

faculty meetings, committee responsibilities, student advising, requirement to publish—they may receive few benefits and little professional support.

Administrative position with teaching responsibilities. Some universities employ former FSOs, and particularly former ambassadors, in positions that include administrative responsibilities for managing academic programs but also include opportunities to teach. Former FSO James Seevers, for instance, serves as the Director of Studies at the Institute for the Study of Diplomacy at Georgetown University and both manages programs and teaches at the graduate level. Former AFSA President Ambassador (ret.) Barbara Stephenson just took up a vice pro-



Mark Storella, at left, plays the U.N. Special Envoy on Syria in a simulation of an international negotiation with students at Georgetown University.

vost position at the University of North Carolina at Chapel Hill. And retired FSO Jane Zimmerman is director of the international studies program at Davidson College in North Carolina (see her profile on p. 27).

Full-time position as a professor of practice. Ambassador (ret.) Chris Hill serves as the Chief Global Adviser and Professor of Practice in Diplomacy at the University of Colorado. These slots are typically better compensated than adjunct teaching and better root you in the academic and community life of a university; but they are also highly competitive to get.

And there are two types of employers in higher education.

For-credit classes. Options include U.S. and overseas brick-and-mortar higher education institutions (e.g., community colleges, four-year undergraduate institutions, graduate schools), as well as online-only degree programs. Class format may be traditional, online or a combination of both.

Non-credit instruction. Less formal teaching opportunities include guest lecturer invitations at universities; participation in panel discussions; and the growing number of adult education programs, such as Road Scholar (previously Elderhostel) and the Osher Lifelong Learning Institute. Some of these programs compensate lecturers, while most are pro bono.

Students typically enjoy active learning opportunities, such as simulations of National Security Council meetings to weigh policy options or diplomatic negotiations to implement policy decisions.

Gaining Experience While in the Foreign Service

The Foreign Service provides numerous opportunities to try teaching to see if it suits you, hone your skills and build academic credentials that might resonate with future employers.

Details outside the State Department. Active-duty FSOs are eligible for roughly 40 detail assignments at U.S. government and nongovernmental academic institutions. Examples include National Defense University and other war colleges; the State Department also has faculty at the Air Force Academy, West Point and the U.S. Coast Guard Academy. Two interesting examples of FSOs who taught while on active duty can be found in *State Magazine's* September 2011 edition: Kelly Adams-Smith taught aboard the *MV Explorer* in the Semester at Sea program as a Cox Fellow, and Robin Holzhauer served as a faculty adviser at the Coast Guard Academy. There are also mid-level and senior-level opportunities at Georgetown University.

Foreign Service Institute. There are more than 60 positions on which members of the Foreign Service can bid at the Foreign Service Institute that involve direct teaching responsibilities, including professional and area studies, leadership and management, language study and applied technology. Positions are available at both the mid- and senior levels and offer opportuni-

ties for on-the-job training in pedagogic techniques.

Part-time/guest lecture teaching options. Some active-duty officers teach evening classes in addition to their normal work. If you teach at a university while on active duty, you will need approval from the Legal Adviser's Office to receive pay for adjunct work. You can also volunteer to give guest lectures at universities

wherever you are posted, as well as at FSI in a variety of professional courses as an area specialist. (Some lectures may require clearance through Public Affairs.)

Publication. Members of the Foreign Service can develop a list of publications by writing articles while still in service, both on their work and on other topics of interest to them. While these will not likely appear in peer-reviewed academic publications, published articles may make you a more attractive candidate for academic institutions. (All such publications require clearance through Public Affairs.)

Ambassador (ret.) Piper Campbell

Current position: Will begin spring 2020 as an adjunct professorial lecturer at American University, Washington, D.C.; previously taught at the National War College.

How she found the job: *FSI's Job Search Program.* JSP was a great source of information and foundation for networking, she reports.

Responsibilities: Teaching one graduate-level course in the evening (currently writing the syllabus). Part-time teaching is an attractive way to build competency and connections, while also pursuing other interests, Campbell notes. But don't discount the number of hours required for developing a course, interacting with students, and grading, she adds.

Her mission: Supporting women in national security, and finding opportunities to explore what foreign policy might look like in the future—what skills will be needed, and how do we incorporate more diverse voices and “outside the box” thinking?

Observations on teaching today: “Teaching today feels much more dynamic than what I recall: students expect more opportunities to engage with professors—in the classroom, during office hours and virtually. And the technical components of teaching (using programs like Blackboard or others for grading, communication with students and

accessing electronic materials) were all new to me. I was sad to learn most college bookstores don't really sell reference books so much anymore, and so much of the reading is done online now.”



Advice to FSOs thinking about teaching: “If you are interested in teaching as a next career, it is useful to keep track of the many teaching moments that are likely to have occurred during your Foreign Service career. When I sat down to develop an academic résumé, I was surprised to realize how many lectures I had delivered at universities. The list included schools in Cambodia, Iraq, Mongolia, Singapore and Indonesia, as well as the United States. Additionally, at various times I had written articles or op-eds and given interviews that had a more strategic aspect to them and were relevant to academia.

“Certainly, teaching at the National War College was a great opportunity to test out my interest and aptitude, and I highly advise anyone seriously considering academia to look at the many teaching and educational opportunities within State—including at FSI.

“But, even without filling one of those posts, there are many opportunities to teach in the course of a career—especially as we further emphasize engagement with youth, including through programs like the Young Southeast Asian Leaders Initiative.”

Finding a Teaching Job and Designing Classes

Colleagues who have already made the leap into academia are your best resources—to find work and then to help design your course, particularly if the institution does not provide a syllabus for the class you have been asked to teach. Former FSOs now work at universities across the country, including Georgetown University, The George Washington University, Princeton, Davidson, the University of Colorado, Tufts University's Fletcher School of Law and Diplomacy and the University of Virginia. (Jillian Burns moderates a LinkedIn group, “Foreign Policy Practitioners-Educators

Network,” to help FSOs connect.) In addition, AFSA and FSI's Job Search Program have sites that post job listings, including educational opportunities. There are various websites that list teaching positions, both in the United States and overseas. Retired FSO Jane Zimmerman, who was hired in 2019 at Davidson College, recommends signing up for “Global Jobs” alerts (globaljobs.org); to narrow her search, she used the term “professor of practice.”

You can also “cold call” schools that interest you, particularly since adjunct positions are rarely advertised. After perusing course listings of schools of interest, you can contact department

heads and let them know what classes you would be qualified to teach if they ever have a need, as well as what new classes you could design and teach that could address gaps in their curriculum. Chris Kojm, professor of practice in international affairs at The George Washington University's Elliott School of International Affairs, recommends preparing a one-paragraph summary or a one-page syllabus outline of your proposed course to provide with your résumé. The outline, he noted, should spell out both the course's learning objectives and the skills the course will develop.

Once hired, you may be able to plug into an existing course with a prepared syllabus. Most often, however, you will need to develop material from scratch, including reading lists, lecture notes, PowerPoint presentations, assignments, simulations and tests. Teaching is not just telling war stories; do not underesti-

mate the amount of work that goes into designing and preparing a coherent and compelling syllabus. This is a matter of both art

and elbow grease. However, you can often draw on resources at your academic institution. Many universities have offices devoted to helping teachers teach more effectively, offering workshops and consultation for instructors, including part-time instructors. Do not hesitate to ask your new colleagues for help, as well.

Students typically enjoy active learning opportunities, such as simulations of National Security Council meetings to weigh policy options or diplomatic negotiations to implement policy decisions. Designing simulations is very time-intensive, but there are numerous resources to assist. The State Department's National Museum of American Diplomacy (formerly called the U.S. Diplomacy Center) has an education outreach program that provides simulation materials and support for teachers, as well as other useful

If you are depending on a lucrative post-FS career to pay for your kids' stratospheric college tuition, teaching may not be for you.

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SHARED WISDOM (AND CURRICULA!): AFSA's Next Stage Teaching Network

A FSA has heard from many members who have transitioned into academia that developing curricula is challenging. They emphasize how much they wish they could readily collaborate with other FS personnel who have experience in this realm.

We at AFSA asked ourselves: Why should our members start from scratch when such a rich brain trust already exists? AFSA could help in its role as a convener for the interchange of ideas regarding teaching the practice of diplomacy, international affairs and associated topics.

This is the inspiration behind AFSA's new Next Stage Teaching Network (www.afsa.org/teaching-diplomacy). The page is broad in its definition of the terrain covered. A prime focus is on how to teach the practice of diplomacy, and its coupling of strategic thinking with practical solutions. The teaching of international affairs and the role of diplomacy, different matters entirely, are also included, as well as resources for finding positions.

AFSA hopes this initiative will prove to be not only

a valuable service to members, but a significant step in building an understanding of diplomacy and its importance to the security and prosperity of the United States, a critical part of AFSA's mission.

The Next Stage Teaching Network currently consists of the American Academy of Diplomacy's treasure trove of curricula; the Association for Diplomatic Studies and Training's impressive collection of oral histories, publications and other materials; the library of Case Studies in Global Affairs at Georgetown University's Institute for the Study of Diplomacy; AFSA's teaching resources; materials from the Department of State's National Museum of American Diplomacy; and the USAID Alumni Association.

If you are teaching on the tertiary level and have a syllabus, book list or any other materials you have developed that are germane to the teaching of international affairs and/or diplomacy, please consider sharing them on AFSA's site. Please send your materials (or questions) to Dolores Brown, Retirement Benefits Counselor, at brown@afsa.org.

—Dolores Brown

resources such as their "Diplomacy 101" series. Simulation topics include peacebuilding, nuclear nonproliferation and energy security. The Council on Foreign Relations, Georgetown University's Institute for the Study of Diplomacy and others have also developed simulation exercises. And Georgetown ISD's library of 250 diplomacy case studies for the classroom can be accessed for reasonable fees.

To assist members who choose teaching as their "next stage," AFSA has launched a new initiative designed to centralize resources for teaching diplomacy, from finding and securing a position to developing courses (see "Shared Wisdom" above).

You should embark on teaching diplomacy with your eyes wide open to both the challenges and opportunities academia presents.

While you would never want to calculate your hourly wage for all the work that goes into teaching, it can be a very rewarding way

to make use of the skills and experience you accumulated as a U.S. diplomat. A teaching adjunct position allows for a fairly flexible schedule, so you could teach a class while doing other types of work.

Moreover, teaching forces you to stay engaged. Just like

a good diplomat, a good teacher should enjoy being a lifelong learner, and you will find you learn as much from your students as they learn from you. Teaching the next generation is a wonderful way to expand and continue your life of service, focused not just on the here and now but also on the challenges we as a nation will face over the horizon. ■

Active-duty FSOs are eligible for roughly 40 detail assignments at U.S. government and nongovernmental academic institutions.

Outside Observers See the United States in Ways We Ourselves Cannot

The views of well-informed foreign observers can offer a welcome counterpoint to the extreme ups and downs of Americans' own assessment of our nation and its role in the world.

BY ALEXIS LUDWIG

In his magisterial biography of George Kennan, John Lewis Gaddis highlights a central irony in the thinking of America's most illustrious diplomat. As penetrating as Kennan's insight into Soviet Russia was, he was stunningly myopic and misguided when it came to his own country. He tended to see the United States in the most pessimistic of lights, as unequal to the grave and gathering challenges of the times, a cesspool of corruption and destined for decline.

Kennan was and is not alone. Mistaken self-assessment is a kind of occupational hazard for the human species. For Americans, the self-assessment seems to swing between extremes:



we are the nation embodying the special providence of the “City upon a Hill” on one hand, and the nation falling far short of those same high-flying ideals, and hurtling headlong for destruction, on the other. Perhaps these are two sides of the same coin.

Whatever its wellsprings, the collapse and fall of the United States is a recurring theme in the annals of postwar American commentary. I was reminded again of this fact by the focus of this summer's *Foreign Affairs* magazine, titled—you guessed it—“What Happened to the American Century?” In this latest chapter in the long-standing chronicle of America's decline, for example, Fareed Zakaria claims the United States has squandered its unipolar moment; Larry Diamond describes the collapse of the U.S.-led Freedom Agenda; and Dani Rodrick analyzes how globalization undermined American interests. And so on.

As a child of the Cold War, I myself recall the countless news stories in the 1970s and 1980s dedicated to the proposition that the Russians would handily win the running superpower competition. One memorable *Time* magazine cover from that



Alexis Ludwig is a 26-year Foreign Service veteran currently serving as deputy permanent representative at the U.S. Mission to the Organization of American States. He is chair of the FSJ Editorial Board. The views expressed are his own.

era captured the mood perfectly. Following yet another bilateral summit agreement in which Soviet negotiators had allegedly bested ours, it featured an oversized drawing of a dramatic superpower handshake—with the grasping hand painted in the colors of the Soviet hammer and sickle while the hand being grasped was rendered in the American red, white and blue. As a pithy letter writer gasped the following week: “Your cover clearly showed that the Russians have got us!”

Fast-forward to the fall of the Berlin Wall and the collapse of the Soviet empire. It wasn’t long before academic analysts like Chalmers Johnson began cawing darkly, “The Cold War is over, and Japan won.” Japan had traded places with the United States, become the new “Number One” and was now set to spread so-called “Pax Nipponica” into the new Asian century. Once again, the United States was cast in the role of a fading power, tired and corrupt, our hollowed-out industry and eroded economic base faltering in the face of the fierce competition from our dynamic new rival and partner, with the erosion of our geopolitical influence sure to follow.

Somehow that scenario, too, failed to come to pass.

Today, it is China’s turn. The rising billion-strong behemoth is often portrayed as being on the verge of pushing aside and displacing a politically distracted and inward-looking “America-first” United States that is once again, of course, sliding down the slippery slope of decline.

True, the past may not be prelude, and the wolf might actually be roaming hungrily on the hillside among the sheep this time around. But it still seems relevant to ask: What is wrong with this exceedingly gloomy picture? Why does the news of America’s demise always seem so premature, at least in retrospect?

Factors to Consider

I’d like to propose several factors to explain the mistaken self-assessment of American analysts about the future of their own country. I will close with a modest counter-proposal, highlighting the importance of hearing the perspectives of informed outside observers, to balance out our own navel-gazing.

The first factor has to do with the perpetual crisis of democracy. As the Argentine political scientist Guillermo O’Donnell wrote in a brilliant 2007 essay on this topic: “Democracy is and always will be in some kind of crisis, for it is constantly redirecting its citizens’ gaze from a more or less unsatisfactory present toward a future of still unfulfilled possibilities.” Whatever else the United States may be, it is a big, complex, boisterous and imperfect democracy. Its present is therefore always unsatisfactory,

The United States is a big, complex, boisterous and imperfect democracy. Its present is therefore always unsatisfactory, and its unfulfilled future always in doubt.

and its unfulfilled future always in doubt. So many things have gone awry, and so many others might possibly go wrong!

If the point is not quite clear, this means that the United States has had, now has and always will have many grave shortcomings, faults and problems. It also means that these ever-present problems—this perpetual crisis—will tend to attract the attention of our most thoughtful observers and analysts. Indeed, their—and our—gaze will be constantly redirected there. If we’re lucky, it might also mean that as a result, eventually, our democratic system itself will respond with some kind of solution or solutions, even if not necessarily at the pace one would wish or in the manner one would hope and know would have been better, until the next new round of problems and challenges comes along.

In this reading, the chronicle of perpetual American decline would have the paradoxical effect of helping prevent its own predictions from coming true.

By contrast, autocracies prefer to project false portraits of flawless perfection, even if these portraits are generated by sweeping problems under the rug, by keeping troubling information under wraps and by silencing unsympathetic observers and critics. The result: unaddressed problems that fester, deepen and grow more problematic over time.

This recalls Winston Churchill’s famous quip about democracies being the worst political alternative save all the others. But which of these imperfect options do we prefer?

A Vast and Messy Complexity

A related possibility is that the United States is too big and complex to wrap one’s head around in the first place. It is the elephant in the proverb about the blind man, impossible to summarize as any one thing without falling into some blatant contradiction with respect to one of its many other, equally compelling, characteristics. It contradicts itself, because it is large and contains multitudes: Texas and California; the inward-

While the nature and mood of the current moment feel somehow different, the persistent critical questioning and unhinged, sometimes blistering criticism of the United States itself are hardly new.

looking power with unparalleled global reach; the profane land of hyper-religiosity; the rules-based nation where those who flout the rules sometimes rule. One could go on.

In his autobiography, Edwin O. Reischauer, the father of American Japanology, expresses gratitude that his own lifelong professional focus had been the relatively uniform and intellectually graspable Japan and not the impossibly vast, complex and polymorphous United States. There is something in the sheer size and scope, the “Sturm und Drang,” the endless variety and churn of the United States that makes clear patterns difficult to discern, until they emerge from the confusion in some new and distinctive shape, perceptible in retrospect. Like Steve Jobs borrowing several characteristically Japanese design features to resurrect Apple into the most highly valued corporation in the world. Who knew even 25 years ago that almost everyone in the world would be walking around with a smartphone in their hand in 2020? What is the next new game-changing thing on the horizon? Will it emerge from outside the United States, and leave us in the dust? Really? Are you willing to place a bet?

It seems to me that the vast and messy complexity of the United States can blind us to the beating heart, the inner dynamism, the endless striving of this country. We mistake cacophony for noise; unbounded movement, and the accompanying mistakes and false starts, with anarchy; endless bad news with inevitable doom. In fact, these things may well reflect democratic resourcefulness and open-society resilience at work. I will never forget my overwhelming initial impression on returning to California for home leave after spending three years in Malaysia.

We had taken off from Kuala Lumpur’s then brand-spanking-new international airport—its gleaming halls echoing, listless and mostly empty at the time—and landed in Los Angeles. LAX was a veritable assault on the senses by comparison, a hectic explosion

of human energy, of seemingly chaotic hustle and bustle, bursting at the seams with taxis and minibuses and macrobuses and all the rest, the whole motley multihued gang of them on the make. You could all but feel the jostling for position, the unchained ambition, the money being made. It suddenly occurred to me that, whatever the creaky, aging state of the airport’s infrastructure (trick question: Which one was the “developing” country?), I was seeing more naked commercial and economic dynamism curbside at LAX than I had seen the entire previous year in KL.

It wasn’t necessarily pretty, but it pretty much put things in perspective. Things could surely be better, but they were probably not as bad as they seemed.

Incomplete Understanding

Now I’d like to double back to where I began. It seems to me that many of us err, to differing degrees, in the same direction George Kennan did. However keen our assessment of foreign countries, we have an incomplete understanding of our own country. For one, we are too emotionally involved, too closely connected with the object of study to achieve the needed perspective. We don’t have the same kind of cool-eyed separation that we enjoy in assessing the challenges and opportunities of others. In consequence, our conclusions about the United States, its current predicaments and future prospects, will tend to be myopic and to some degree misguided. At the same time, we are often too far removed from its fundamental truths, unaware of the reality “on the ground,” out of touch with the real United States as opposed to inside the Beltway and within our own self-involved bureaucracy.

Former Secretary of State Colin Powell reportedly urged his senior advisers to keep abreast not only of developments related to their areas of professional expertise but also of popular culture, to ensure that they remained psychologically connected with the people they (we) represented. Let me immediately point out a way that I myself have fallen short on this score. After serving several successive tours abroad, I was out of the loop with respect to key aspects of evolving U.S. culture. For one, I largely missed the importance and impact of reality TV—“The Celebrity Apprentice,” in particular—on our political system. As a result, my ability to accurately read and interpret the United States for others was severely compromised and diminished. (I had been a bit more prescient in predicting the way in which the hit TV series “24” had helped pave the people’s way psychologically for the rise to the nation’s highest office of the current occupant’s predecessor.)

In the context of these musings, I find myself less sure about my views on critical current events and controversial foreign policy questions than I might otherwise have been. For example,

given the U.S. role as principal guardian and pillar of the post-World War II international order, is the administration's apparent break from established foreign policy orthodoxy a fatal blow, a needed jolt or something else entirely?

Is the element of apparent unpredictability in our approach a welcome wild card that opens new options for us, or a potentially perilous one that could accidentally unleash a serious global crisis? Does it cause our partners and allies to question our commitment and reliability, or force them to reassess their own wavering commitment and uncertain reliability, and to correct course in that way?

In other words, does it keep our strategic rivals on their toes, compel them to reappraise what we might do in a pinch rather than assume that we will be predictably prudent and cool-headed, and therefore easy to anticipate and outmaneuver? Do the seemingly unusual events of the day spell the last gasp of our preeminence, a parenthetical pause, or some more fundamental and potentially welcome change of direction?

While the nature and mood of the current moment feel some-

It is no surprise that one of the most penetrating and lastingly relevant appreciations of democratic practices in the United States was penned by a young French nobleman, Alexis de Tocqueville.

how different, the persistent critical questioning and unhinged, sometimes blistering criticism of the United States itself are hardly new. Far from it, in many ways they are more of the same.

Whatever our own answers to these and other questions are—and I know that many of us have strongly felt convictions in this respect—my argument here is that we ourselves are ill-equipped



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to provide them. That is, we will have trouble coming to the kinds of dispassionately considered conclusions that reflect the underlying facts, rather than the desperate hopes and shifting fears of our own imaginations. Because these conclusions will not fully account for the critical subterranean elements that are more quietly shaping our country's future out of the limelight, they are unlikely to withstand the test of time.

A Welcome Counterpoint

The views of well-informed foreign observers of the United States that follow provide a welcome counterpoint in this light. Whatever their own biases or ulterior motives, they will tend not to be colored by excessive emotional proximity to their subject, or by counterintuitive disconnection and remove. Through their differing lenses, they will see patterns that we cannot. It is no surprise, for example, that one of the most penetrating and lastingly relevant appreciations of democratic practices in the United States was penned by a young French nobleman, Alexis de Tocqueville. Latter-day foreign observers of the United States may prove simi-

larly compelling with respect to the deeper dynamics at work in our society and the sources of our own foreign policy conduct.

In the *Journal's* July-August 2019 edition focused on China, retired Senior Foreign Service Officer Susan Thornton cites a former Chinese leader puzzled by Americans' fraught (to him) misapprehension of their own country's place in the world and supposed uncertain future: "The United States has an ideal geographic location, friendly neighbors, rich resources, a young and talented population, the largest and most productive economy in the world, the most well-endowed military on the planet that outstrips the next eight combined, more than 50 allies and more than 100 military bases all around the world. You should be confident. America is not in decline—it is in constant renewal."

Foreign observers of the United States can view us from a perspective we are unable to see ourselves—from the outside. They can cast our present and future in a different kind of light, without the emotional distractions of enthusiastic wishful thinking or the fantastical imaginings of worst-case scenarios. For these and other reasons, we welcome what they have to say. ■



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Keeping the Relationship Special

Don't underestimate the importance of continued U.S.-U.K. collaboration, a senior British diplomat says in reviewing his trans-Atlantic experience.

BY PATRICK DAVIES

Working closely with the U.S. Foreign Service is the bread and butter of most British diplomats. My own experience was no different. Over almost 25 years in the British Diplomatic Service, I worked extensively with U.S. diplomats around the world. It's fair to say that something would have been seriously wrong with the "special relationship" if that had not been the case.

Working together as the ally of choice has been hardwired into British and American diplomacy for decades. But as both our countries face unprecedented political turmoil at home and growing challenges from abroad, the importance of continued U.S.-U.K. collaboration should not be underestimated or its inevitability assumed.

A Working Relationship, and Much More

During my first posting to Rabat as a junior political officer in the mid-1990s, I worked hand-in-glove with U.S. colleagues on a



Patrick Davies was deputy head of mission at the Embassy of the United Kingdom in Washington, D.C., from 2013 to 2018. Over a 25-year career in the British Diplomatic Service, he also served in Morocco, Poland, Iran and the U.K. Currently on a career break, he is writing a book about the United States.



concerted push to try to resolve the Western Sahara conflict—one of the United Nations' longest-running peacekeeping missions. Former U.S. Secretary of State James Baker was heavily engaged as United Nations Special Envoy. As a close ally, the U.K. was doing everything it could to support his efforts against significant resistance from Morocco, backed by France. I traveled with my U.S., German and U.N. colleagues to the Moroccan occupied territories of Western Sahara and to U.N.-supported refugee camps in the rebel-controlled desert of southern Algeria. We jointly lobbied the Moroccan and Algerian governments to cooperate more closely with the U.N. and encouraged other allies to get behind the efforts to resolve a conflict that felt like no one's priority.

Ultimately, James Baker's efforts were unsuccessful. But it was impossible not to be impressed by the drive and hard work of those American diplomats who were trying to find a solution to a dispute that had blighted the lives of thousands of people over more than two decades. I learned a great deal from their

Tackling shared global challenges is, of course, front and center of the work Brits and Americans do together.

example. I also began to understand the sometimes-frustrating limits to diplomacy, particularly when all the U.N.'s five permanent members do not agree.

When back in London in the early 2000s, I was private secretary (deputy chief of staff) to two Foreign Secretaries—Robin Cook and Jack Straw. I was one of the officials in the back of the room in their regular meetings with their U.S. counterparts, Madeleine Albright and Colin Powell. And I was the guy who often took the records of their multiple phone calls at all hours of the day. As a relatively inexperienced British foreign service officer, I don't think I understood until that point just how extensive our cooperation was with the United States across all the main global issues, and just how important personal relationships at every level were to our work together.

When I met Colin Powell again in Washington in 2013, it felt remarkably familiar even though it had been 10 years since I was listening in to his calls with Jack Straw in the run-up to the second Iraq War. I developed huge respect for the “behind the scenes” professionals of the State Department Operations Center, too. I spoke to them on a regular basis to set up calls between our Secretaries of State or to track down senior U.S. officials to discuss the agendas or logistics for meetings. They seemed to be able to fix anything at any time of day. It was a model the Foreign and Commonwealth Office soon worked to replicate in its Global Response Centre, albeit on a smaller scale.

As deputy head of mission (DHM) in Poland in the mid-2000s, I worked closely with my U.S. opposite number. We routinely shared analysis of the country as it grappled with post-communist transition, joined the European Union and began to dabble with the kind of populism we now see gaining strength in many Western countries. I have no doubt that the advice I sent back to London was better as a result of this cooperation. But more than that, the U.S. deputy chief of mission and I also shared our experiences of how we tackled many of those “DHM headaches” of running an embassy, including working within the constraints of obscure local laws and finding yet more “efficien-

cies” in the operation of our missions. We joked at times about our “mutual therapy” sessions.

Tackling shared global challenges is, of course, front and center of the work Brits and Americans do together. But the relationship is much more than that. A wider sharing of best practices and supporting each other was a key part of my experience of working with U.S. diplomats throughout my career. This collaboration, born out of the depth of the relationship and mutual trust, helped to make our diplomatic services more effective and, ultimately, made us all better diplomats.

In my last London-based role before moving to the United States to be deputy ambassador in 2013, I traveled regularly to Washington, D.C., as head of the Foreign Office's Near East Department to coordinate the international response to the unfolding crisis in Syria. In partnership with the United States, we were trying to work out how to bind Russia into a peace process to stop the fighting. And we spent many hours constructing sanctions that might garner enough international support to be widely implemented and therefore increase the pressure on the Syrian government to come to the negotiating table.

We weren't successful: Russia instead chose to step in and prop up the Assad regime. But the experience reinforced my view of the United States as a huge force for good in the world; even if it doesn't always get it right, its diplomats play a leading role in trying to make the world a better place by plugging away at the most intractable global problems.

Differences and Challenges

The only time in my career when I didn't work routinely with American diplomats was while posted to Iran in 2009-2010. The United States, understandably, had not had a presence in Tehran since the Islamic Revolution in 1979 and the ensuing hostage crisis that had the world on tenterhooks for more than a year until the American hostages were released in January 1981.

But being in Tehran did not stop coordination altogether. I simply shared my experiences and insights with American colleagues whenever I traveled outside the country, to help ensure our closest ally had an accurate picture of developments inside Iran. There was an insatiable appetite for information in Washington, particularly as Green Movement protesters turned out in the tens of thousands to demonstrate against President Mahmoud Ahmadinejad's stolen re-election in 2009 and were violently suppressed by a brutal regime.

My last posting in Washington, D.C., took working with the United States to another level. Like everyone in the embassy, I engaged with U.S. colleagues across the whole administration

and on Capitol Hill. With our foreign policy teams, I worked with State on all the hot global challenges and many issues that didn't make the headlines, as well—from Syria to Iran, from Russia and Ukraine to North Korea, and from nonproliferation to human rights. But more than that, our State Department colleagues helped us to understand the United States, too.

Many British diplomats arrive in America unwittingly unprepared for the differences between the U.K. and U.S. systems. The closeness of the relationship and our shared history and language tend to lull us into a false sense of security. But the differences can be profound. I often turned to State Department colleagues to help navigate my way through the U.S. system or to explain what was happening in U.S. politics. Their help undoubtedly made me better at my job.

From all my experience of working with American colleagues, I have no doubt the United States has some of the best diplomats in the world, with an impressive capacity for hard work and dedication to service, an unbending commitment to tackling

some of the world's most difficult problems while advancing U.S. interests, and a profound belief in the value of working with allies. In the U.K., we can sometimes be more nimble in reaching an agreed government position on a particular foreign policy issue. Working across government departments is also arguably a stronger part of our DNA. Much of this is simply a matter of our smaller scale, which makes reaching agreement between departments easier and working across government essential to make the most of more limited resources. But no other Western country can match U.S. resources and capabilities when the administration mobilizes behind a chosen course of action to address a foreign policy problem.

The "special relationship" isn't without its challenges. Tony Blair's decision to support George W. Bush in the 2003 invasion of Iraq set Britain on a collision course with its two largest European Union partners, France and Germany, who opposed the war. While the decision reinforced Britain's position as the United States' ally of choice, it set back Blair's efforts to



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A wider sharing of best practice and supporting each other was a key part of my experience of working with U.S. diplomats throughout my career.

strengthen Britain's relationship with the European Union and to reinforce the U.K.'s role as a bridge between the United States and Europe. Blair's reputation at home was seriously damaged as the war unfolded; for some, it never recovered.

Being the "smaller partner" can occasionally have its frustrations, too, including when assumptions are made about U.K. support for a particular course of action or consultation is left to the last minute. But the frustrations are not one-sided. When David Cameron asked the British Parliament to back airstrikes in Syria in 2013 and lost the vote, Barack Obama had little choice but to go to Congress with the same question. With the memories of the Iraq War still fresh in the minds of people on both sides of the Atlantic, it soon became clear there was little public support for renewed military action in the Middle East despite President Bashar al-Assad having brutally used chemical weapons on his own people. The West blinked, with consequences we are still feeling today.

In most cases the "special relationship" gives the U.K. unique access to U.S. decision-making and the ability to influence American thinking as policy options are developed. It's a privileged position that most other U.S. allies would love to emulate, whatever their posturing about the U.K. being a "poodle" of Washington, D.C.

New Trials

It's fair to say that the last three years have been difficult for many British and American diplomats, as developments at home—and around the world—put new pressure on the relationship and the trans-Atlantic alliance. The United States has been on a political rollercoaster since 2016, with many Americans fearing the country they love could be about to hurtle off the rails with profound consequences for the future. At the same time, the U.K. has been grappling with its own seemingly unending political crisis, with Brexit likely to infect British politics for years to come. Both countries are facing increasing division among their diverse communities, with populists trying to capitalize on

understandable frustrations over the growing gulf between rich and poor and uncertainty about the future. It's an anxious time.

But this period of political uncertainty just reinforces the case for British and American diplomats to work together. We know the West's enemies are actively seeking to destabilize our countries by interfering in our elections and weaponizing social media to amplify divisions in society and increase distrust in our institutions. These same enemies will also seek quickly to exploit any weakening of the trans-Atlantic alliance on the back of the populist-driven inwardness of America First or Britain "taking back control." Our alliance has secured peace in the West for more than 70 years, fostered huge economic progress and helped to spread democracy to many countries that had fallen under the yoke of Soviet communism after World War II; this should not be put at risk. We must double down on working together to defend ourselves from these threats, including by finding a way to regulate the social media giants who are doing untold damage to our democracies.

Diplomats, like all public servants, must always be guided in their work by the priorities of their political leaders—that is how our democracies work. In the current political climate, this has meant we have sometimes diverged from long-held positions and been put at odds with traditional allies, which has been uncomfortable and unsettling. Public servants on both sides of the Atlantic have also found themselves under personal attack from politicians and the media simply for doing their job. Some have had little choice but to resign.

These attacks have been unprecedented and shocking. Not long ago, they would have been almost unthinkable in Western democracies. But away from the spotlight, in the day-to-day work of diplomacy, there is still much we can do to underpin the values and beliefs we hold dear—those of freedom, democracy and human rights—even when there is a fire burning in our own backyard.

With enduring poverty in many parts of the world, growing regional tensions in the Middle East and North Asia and the existential threat from climate change, there are plenty of problems needing solutions. Only by working together can we hope to continue to shape the future direction of world events and bolster the liberal world order.

The dedication, integrity and impartiality of our diplomats are more important than ever if we are to tackle these problems. Indeed, they are arguably essential if we are to get through these unsettling times intact. I have no doubt that the best of diplomats on both sides of the Atlantic are up for the challenge. ■

Working with the United States

A View from Panama

Not without hiccups, U.S.-Panama ties can become stronger with frank and open discussion, a former ambassador to the United States observes.

BY JAIME ALEMÁN

The relationship between the United States and Panama has historically been positive, despite occasional hiccups during the times when the U.S. still had control of the Panama Canal. Panama felt that it was being short-changed economically and humiliated politically as a result of the one-sided conditions created by the

1903 Hay-Bunau-Varilla Treaty, which gave the United States the right to build the canal and administer it while maintaining an enclave in perpetuity within Panamanian territory.

The 1977 Treaty returning the canal to Panama on Dec. 31, 1999, was one of the biggest diplomatic successes of the last 50 years anywhere in the world. Panama has done an admirable



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Jaime Alemán was appointed Panama's ambassador to the United States in August 2009 by President of the Republic of Panama H.E. Ricardo Martinelli Berrocal. He presented his credentials to President Barack Obama on Nov. 4, 2009, and served as ambassador until January 2011. Mr. Alemán is a member of the District of Columbia Bar Association, the Panama Bar Association, the American Bar Association, the International Bar Association and the Society of Trusts and Estate Practitioners.

job running the canal, to the point that today the waterway is for all purposes a non-issue in the bilateral relationship.

The U.S.-Panama Trade Promotion Agreement, which entered into force on Oct. 31, 2012, further cemented the strong diplomatic and commercial bonds between our two countries. The United States has always been and still is Panama's main trading partner. The dollar has circulated freely in the country since the time of its independence; this has been hugely beneficial to Panama, contributing to the country's economic growth and stability.

The economic and military might of the United States tends to create a certain arrogance that prevents U.S. diplomats from understanding and accepting the other parties' concerns and viewpoints.

Today, Panama has Latin America's highest per capita income, and economic growth has averaged 6 percent over the last 15 years. The country's banking system remains strong and was hardly affected by the 2008 worldwide economic meltdown. The canal had a net profit of \$1.8 billion last year, which allows the government to provide generous subsidies to the poor for housing, transportation, education, electricity and health care. The country's life expectancy is 79 years, the same as the United States.

Panama's Concerns

The real concerns in the bilateral relationship during the last decade have revolved around the issues of drug trafficking, money laundering, tax evasion, corruption, security, illegal immigration, the growing Chinese influence in the country and the lack of a transparent judicial system, as well as Panama's positions in the Organization of American States and the United Nations regarding Cuba, Venezuela and Israel-Palestine—all important and sensitive issues.

In my experience as Panama's ambassador to the United States and in subsequent interactions I've had with U.S. diplomats, I've found that it's important to discuss matters as openly and respectfully as possible, without relying too much on diplomatic jargon that can sometimes cloud the issues that need to be resolved. As long as both sides are open and transparent, a solution can usually be found.

Sometimes this can be difficult, however, because the economic and military might of the United States tends to create a certain arrogance that prevents U.S. diplomats from understanding and accepting the other parties' concerns and viewpoints. This, in turn, precludes the United States from being more flexible during negotiations, which can be detrimental

to American interests in the long term because it engenders resentments that can prove difficult to overcome.

Panama has traditionally had a very close working relationship with the United States on matters of security and drug trafficking, especially in Darien province next to the Colombian border, which is the area of major concern. Panama has as great a vested interest in this issue as Washington has, so collaboration has been good and the results relatively positive.

The same applies to the issues of money laundering and tax evasion, where Panama has done a fairly good job. There is, however, growing frustration in the U.S. Treasury's Financial Crimes Enforcement Network, at the Organization for Economic Cooperation and Development, and in the intergovernmental Financial Action Task Force with a small group of attorneys in Panama who have successfully managed to prevent the implementation of measures that would result in a more effective system.

The government of Laurentino Cortizo Cohen, who was sworn in as president in July 2019, has promised to implement new measures guaranteeing full transparency by the end of this year, which is a step widely applauded and supported by the United States and by those in Panama who want to improve the country's image.

At the moment, the following three issues are the main points of contention between the two countries.

Lack of an Effective Judicial System in Panama

The acquittal of former President Ricardo Martinelli after he was extradited from Miami to Panama on eavesdropping and misappropriation charges crystallized frustration in the United States about the lack of a transparent judicial system in Panama.

The Martinelli judgment was highly controversial because there was overwhelming evidence for conviction. The judgment, which has been appealed, reflects a weak judicial system. The United States is demanding that the problem be solved, and this concern is shared and supported by civil society in Panama.

The lack of a transparent judicial system is a barrier for many U.S. companies; they decline to participate in bidding for public procurement for government projects, since they perceive the process to be rigged, and there is no effective judicial remedy. Given U.S. Secretary of State Mike Pompeo's emphasis on using diplomacy to promote the interest of U.S. companies around the world, this issue has created real tension.

The weak judicial system has also allowed many drug traffickers and money launderers to walk away free after they've

been indicted and gone to trial, where they benefit from acquittals given by corrupt judges. This is a continued source of frustration both for U.S. and Panamanian prosecutors.

The Chinese Presence in Panama

The government of Juan Carlos Varela (2014-2019) established diplomatic relations with the People's Republic of China on June 12, 2017. It was a surprising but not shocking development, given the fact that many other countries have done so recently.

What was shocking and of great distress to the U.S. government, however, was the way that the Varela government turned its attention to China. President Varela visited the country twice, with much fanfare and high-level delegations, and openly supported an ill-advised project to build a \$5 billion railroad from Panama City to the border with Costa Rica as part of the so-called Belt and Road Initiative. Fortunately, the project never came to fruition.

Varela also awarded important government contracts to Chinese companies under questionable circumstances and tried to give a choice piece of land to the Chinese government at the entrance to the Panama Canal, but he had to backtrack in the face of U.S. pressure and rejection from many Panamanians.

The award of a concession to the Hong Kong-based Panama Ports Company under very dubious circumstances 22 years ago to manage the Balboa port at the Pacific entrance to the canal has also been a source of friction with Washington. The company has used dubious tactics to prevent the opening up of Panama's port sector, causing considerable damage to the country's logistics plans.

The United States strongly believes that the port, telecommunications and energy sectors should be in the hands of Western countries for security reasons, which has added to the tensions resulting from the Chinese presence in the country.

Recently, President Laurentino Cortizo and Foreign Minister Alejandro Ferrer have distanced themselves from the Chinese, to the great pleasure of the U.S. embassy in Panama City, which has been ably led by Deputy Chief of Mission and Chargé d'Affaires Roxanne Cabral since the resignation of former Ambassador John Feeley in January 2018.

Illegal Immigration

But perhaps the biggest current disagreement between the two countries lies in the refusal of the Cortizo government to build internment camps in the Darien region of Panama to detain and hold illegal African and Cuban immigrants who enter South America via Ecuador and Brazil and then make



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In the short term, Panama's refusal to build internment camps will continue to negatively affect the bilateral relationship.

their way to Colombia, before crossing the Darien jungle on foot with the hope of eventually reaching the United States.

Then-Acting Secretary of Homeland Security Kevin McAleenan visited Panama to discuss the matter, but President Cortizo did not meet with him. Mr. McAleenan met instead with Foreign Minister Ferrer. Panama didn't immediately agree to the request; there is strong public opposition in Panama, and it is doubtful that Panama's position on this will change.

In the short term, Panama's refusal to build internment camps will continue to negatively affect the bilateral relationship. But given the long-standing friendship between the two allies and the large number of important issues on which the countries agree, I believe the future of the relationship will remain solid.

The fact that practically all of Panama's business and political leaders have been educated in the United States, combined with the geographical proximity of the two countries and the wide use of English in Panama, is the basis for building an even stronger relationship in the future. However, for that to happen, it is up to us as Panamanians to strengthen the rule of law and separation of powers, and reduce the rampant corruption that has been a scourge throughout our history. Accomplishing these goals will put us in a much better position to address and rectify many of the issues where this is common ground for further improvements, and the bilateral relationship should become even stronger. ■

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Hope for a Renewed Partnership in the Americas

A Bolivian diplomat reflects on more than two decades of personal experience dealing with the United States.

BY JAIME APARICIO OTERO

Both as a career Bolivian diplomat and as an official working with the Organization of American States, I have had intensive firsthand experience dealing with the United States for more than a quarter of a century. This includes my time as Bolivia's vice foreign minister during the 1990s and as Bolivia's ambassador to the United States from 2002 to 2006. It's been a mixed bag, with much good and some less so.

While I am concerned by the drift toward authoritarianism visible throughout the hemisphere and the world today, I hope that in the future the United States will help correct that course by renewing its commitment to a foreign policy prioritizing the rule of law and democracy.

A Heady Time

My first impression of American diplomacy as a young Bolivian foreign service officer was, thankfully, positive; and that shaped my view that the United States can be a powerful



force for good in the world. In 1980 Bolivian General Luis García Meza carried out a coup d'état with the support of the Argentinian military and European fascist mercenaries brought in by Klaus Barbie, a Nazi criminal refugee who had fled to Bolivia. Jimmy Carter was the president at the time, so U.S. foreign policy was focused on the pursuit of democratic principles and values over perceived short-term strategic interests.

U.S. support for the democratic forces in Bolivia played a crucial role in ending the dictatorship in my country and in facilitating the return of democratic regimes throughout Latin America in the 1980s and 1990s. I recall the unconditional support for the restoration of democracy in Bolivia of then-Ambassador Marvin Weissman and of career diplomats such as Alex Watson. Thanks, in part, to U.S. diplomacy, by the time



Jaime Aparicio Otero was Bolivia's vice minister of foreign affairs in the 1990s and its ambassador to the United States from 2002 to 2006. He is currently Ambassador in Special Mission to the Organization of American States.

For the representative of a small country in a deeply asymmetric relationship with the United States, it is very difficult to find the space to promote your national interests in the American capital.

of the first the Summit of the Americas in 1994, all states in the Americas from Alaska to Tierra del Fuego, with the exception of Cuba, were democracies. As Bolivia's deputy minister of foreign affairs at the time, I was personally involved in the negotiations leading up to that summit.

President Bill Clinton invited all democratic leaders of the Americas in a hemispheric initiative aimed at rebuilding the inter-American system in a new scenario defined by the end of the Cold War.

It was an exhilarating time, as 34 democratic heads of state and government discussed ways to commit ourselves to the collective defense of democracy and free-market economies. Our shared strategy in these negotiations was to build a new hemispheric architecture based on representative democracy, free markets and social development. The new regional agenda, unanimously approved by the presidents and prime ministers of the Americas, marked an exceptional moment for U.S. foreign policy.

The U.S. role is not all good, however. A more problematic U.S. policy relating to Bolivia, in my experience, has to do with the so-called war on drugs. This policy was deeply flawed and even counterproductive, in my view. Besides failing to do what it was designed to do, the policy lacked a social component in alternative development, and therefore produced unintended negative political and economic consequences, as well. The



COURTESY OF JAIME APARICIO

The first Summit of the Americas in Cartagena in 1994 brought 34 heads of state together to discuss the defense of democracy and free-market economies. From left: the author, then Bolivia's deputy minister of foreign affairs; former U.S. President Jimmy Carter and Carter Center Senior Research Associate Jennifer McCoy.

popularity of Bolivia's intensely anti-American President Evo Morales was rooted in his opposition to the faulty U.S. counter-narcotics policies.

By conservative estimates, the policy has deprived Bolivia's important informal economy of about half a billion dollars a year, or 5 percent of GDP, and has hit activity in sectors such as construction, financial services and small business particularly hard. Moreover, it did not succeed in achieving even its own narrow aims: today Bolivia grows more coca and exports more cocaine than ever. (By no coincidence, the former president was also president of the coca growers' federation.)

Friend or Foe?

When I was Bolivia's ambassador to the United States, a former American ambassador memorably told me, "In Washington there are more diplomats than taxi drivers." For the representative of a small country in a deeply asymmetric relationship

with the United States, this fact makes it very difficult to find the space to promote your national interests in the American capital—especially when U.S. attention and interest are taken up by other regions of the world.

When I started out, for example, the United States was in the midst of the war in Iraq, which absorbed all the energies of the government. The profound upheaval happening in my own country just couldn't compete. I met that reality with a combination of realism

and resignation. But today I sometimes reflect that the Iraq War was a tragedy not only for the Middle East; it also poisoned and fragmented relations with Latin America. The promising idea of mutual respect and shared principles launched in 1994 with the Summit of the Americas was lost during that time, replaced by a combination of narrow policy concerns and growing disinterest that has served neither Bolivia nor the United States.

I personally witnessed two incidents involving the former president of Bolivia, Gonzalo Sánchez de Lozada, that are telling in this regard. When President-elect Sánchez de Lozada and President George W. Bush met in the White House in 2002,

the Bolivian requested an emergency economic cooperation package to support the deep economic reforms that had earned him worldwide recognition. (Sound macroeconomic policies had brought inflation under control, and innovative social policies were beginning to help spread the wealth.) But the U.S. president was not interested. “Sorry, I’m not Santa Claus,” Bush said.

Sánchez de Lozada’s retort was prophetic: “Then, soon you will have me here as an exiled former president. ... And in my place, you will have a government in Bolivia aligned with U.S. enemies.” Within a year, in October 2003, he was overthrown and later fled to exile in Washington, D.C. He was ultimately succeeded by the deeply anti-U.S. cocalero leader, Evo Morales, who remained in power until late last year when he tried to steal an election in pursuit of an unconstitutional fourth term.

Much earlier, in 1994, during Sánchez de Lozada’s first term as president of Bolivia (1993-1997), another telling incident occurred at the Ibero-American Summit in Colombia. When the president of Bolivia crossed paths with Fidel Castro in a corridor of the Hotel Santa Clara in Cartagena, Castro complained that the United States was using its cronies such as Argentine President Carlos Menem and Costa Rican President José Figueres to attack him.

“You’re lucky. You only know the Americans as foes; wait until you know them as friends,” Sánchez

de Lozada quipped. That phrase, too, proved prophetic when, years later, following the rule of Oscar Wilde that “true friends stab you in the front,” the U.S. government refused to financially support a democratic government and ally of the United States, at a time when a conspiracy financed by Venezuela and advised by Cuba overthrew a government that was going through a deep social and economic crisis.

A New Partnership

In recent years, the mood of the region has changed, and diverging views have shattered the democratic consensus of the

“You’re lucky. You only know the Americans as foes; wait until you know them as friends,” Sánchez de Lozada quipped.

1990s. Deep divisions have emerged. For its part, U.S. policy is no longer driven by an overarching uniting principle based on the broadly shared hopes and aspirations of people everywhere. In that sense, we seemed to have gone from euphoria to depression. In the first decades of the 21st century, the U.S. position, supported by many international NGOs, seemed to focus more attention on the great experiment of social inclusion taking

place in such countries as Venezuela, Nicaragua and Bolivia than on confronting the evident drift toward authoritarianism of their governments. This approach was unsuccessful.

The current administration seems to have lost interest in the region altogether. As a result, Latin America, long neglected by Europe and taken for granted by the United States, has found a substitute in China. Eager for natural resources, risk-

tolerant and nonjudgmental about matters of democracy and human rights, China has become the first- or second-largest export market for most Latin American countries.

In the light of the decisive failure of the authoritarian regimes in Venezuela, Nicaragua and Bolivia and the challenge represented by China’s value-free but highly problematic partnership, I hope that the lesson for future U.S. foreign policy is to renew its support for democracy, social development and rule of law in the hemisphere. To help overcome this period of despondency, U.S. diplomats will need to forge a renewed partnership of substance among the committed democracies of the Americas. ■



Jaime Aparicio Otero speaking at The George Washington University's Elliott School of International Affairs in 2006.

The 2010 Haiti Earthquake

A Night to Remember

On Jan. 12, 2010, a sunny afternoon turned into a nightmare. America's deputy chief of mission in Haiti shares his record of the first hours of the catastrophe.

BY DAVID LINDWALL



David Lindwall is a retired FSO who was serving as deputy chief of mission in Port-au-Prince at the time of the earthquake and for the first 18 months of earthquake relief and reconstruction programs.

His other posts included Colombia, Spain, Honduras,

Nicaragua, Ecuador, Guatemala, Paraguay, Iraq, Afghanistan and Sweden, as well as assignments in Washington, D.C.

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What sounded like a deafening peal of thunder on a bright, sunny day made my driver, Raoul, and my bodyguard, Dominic, glance at each other in surprise. We were in upper Delmas, in the heights above

Port-au-Prince, Haiti, heading down the commercial boulevard on the afternoon of Jan. 12, 2010. Raoul and Dominic were tense, uneasy. I pulled the earphones of my iPod out of my ears and stuffed them in my briefcase. The thunder peal was getting louder and closer.

Suddenly the heavy concrete floors of a four-story office building on the right side of the car began slamming down one on top of the other. Thud! Thud! Thud! The huge glass windows shattered into the street. I tried to dial the State Department Operations Center on my BlackBerry, but I didn't have my reading glasses on and, in my nervousness, I couldn't get the numbers right.

Dust was rising from buildings that lay in crumpled heaps. I told Raoul to turn around and head back to the embassy.



COURTESY OF DAVID LINDWALL

“No, boss, we have to get you to your house.”

“Raoul, we have to head back to the embassy!”

Ignoring me, he turned the car into a side street toward my house, but we hadn’t gone 50 feet before the rubble completely clogged the street. There were wounded people walking aimlessly in front of us, and cars had been crushed like soda cans.

We turned on the embassy radio. The excited cacophony of Creole voices was dizzying. The guards at embassy residences were reporting damage to the houses they were assigned to, most not realizing that the entire city had been hit. I asked Dominic what they were saying.

“The lady, she walked into the house, and it collapsed,” he translated. The guard kept repeating the same line in increasing tones of despair.

I asked Dominic to ask the guard who the lady was. Even through his thick accent I could make out that the guard was saying “Victoria DeLong” —the embassy’s cultural attaché.



Upper Delmas had been badly hit, and many buildings had pancaked. The sidewalk market ladies who had been sitting in the shade of the buildings on Delmas had failed to run, and many lay dead on the sidewalk, crushed by chunks of concrete

On Jan. 12, 2010, author David Lindwall was stuck in traffic up on Delmas Boulevard, a main thoroughfare leading down from the top of a hill to the plain in Port-au-Prince. About 30 feet away, set back from the road, the building shown here “pancaked” before his eyes. Six weeks later he returned to take this photo marking the place and time he realized that the sound of thunder heard on that sunny afternoon was, in fact, an earthquake.

the size of refrigerators. The survivors were coated head to toe with a fine white powder from disintegrating concrete and plaster. It looked like the end of the world. We drove past many people, mainly women, on their knees with their arms stretched up to the heavens. Through the bulletproof glass I could hear them wail, “Pitye, Jesi! Pitye, Jesi!” (Have pity on us, Jesus!)

Traffic had become chaotic. At the intersection that led toward the embassy, two nervous policemen waved drivers on. I could see that the Caribbean Market, where I did all my grocery shopping, had collapsed and slid across the street cutting off the road. The car came to a total stop as dusk was setting in. I asked Dominic to look for a flashlight, because we would be walking the roughly 10 miles back to the embassy.

“Give me two minutes, two minutes!” he shouted breathlessly, and jumped out of the car.

As we drove through the poor neighborhood of Tabarre, I could hear the wailing voices of young women in the darkness and could only imagine the losses they must have been grieving.

Before I knew it, he had stopped a motorcycle and convinced its owner to take the two of us down the mountain to the embassy.

The motorcycle wasn't very big, but it was clear the driver was used to carrying two passengers, maybe more. We sped off through the chaotic traffic. Rumbling through my head was the voice of a high school friend: never ride a motorcycle without a helmet. So many roads were blocked by rubble, and the driver headed off on a dirt trail that led up into the mountains through

the shantytowns. Every time he reached a steep grade, Dominic and I would have to get off the bike so the driver could make it through the ruts to the top of the hill. The trail led through a very poor neighborhood that was miraculously unscathed by the quake. The residents were all in the streets looking down on the chaos below.



It was dark by the time we got off the mountain and back on the avenue that led to the embassy. As we drove through the poor neighborhood of Tabarre, I could hear the wailing voices of young women in the darkness and could only imagine the losses they must have been grieving.

Embassy officers and their spouses from the housing complex across the street had gathered on the steps of the embassy. We nervously exchanged news. Regional Security Officer Steve Lesniak, Marine Security Guard Detachment Commander Staff Sgt. Jamie Long and the Marines were all in Post One. With phone lines and cell phones not working, they reached out to the embassy community over the radio and had established

contact with about half of the American employees. They confirmed the news about Victoria DeLong, and told me that three other official Americans had been critically injured and were in the process of being rescued from the rubble of their homes.

I was able to talk to Ambassador Ken Merten by radio. He and his family were trapped in the residence; landslides had cut the one road out in numerous places. Embassy families that lived near the ambassador's residence were gathering there, and several injured survivors of the collapse of the Hotel Montana had been taken there for treatment.

Consul General Don Moore had made contact with the State Department through the embassy satellite link, and I joined him in his office



The author's residence in Port-au-Prince, after the earthquake.

COURTESY OF DAVID LINDWALL

to update the Operations Center on what we knew about the situation in Port-au-Prince. I had hardly gotten on the phone with Ops when they passed me to the Secretary's office. After an exchange of brief but heartfelt greetings with the Secretary's counselor, Cheryl Mills, Secretary Hillary Clinton came on the line. I told her Port-au-Prince had suffered a catastrophe of biblical proportions. We were working to free several embassy officers from the rubble, and it was possible that there had been embassy fatalities. I described the destruction I had witnessed in Delmas and told her that our guards were reporting the same all across the city. The Secretary told me her thoughts and prayers were with us, and said she had set up a task force that would work through the night to get us relief.



The embassy building had survived the earthquake, but the upper floors had been badly shaken. Ceiling tiles and lights had fallen. Lamps and computers were all on the floor. Bookcases were overturned. It took me 15 minutes to get everything picked up off the floor of my office and the computers back up and running. Intending to fix a pot of coffee, I stepped into the front office kitchen only to see the contents of the refrigerator and the cabinets all shattered on the floor. Shards of glass and white porcelain carpeted the floor and filled the open kitchen drawers. I couldn't deal with it. Coffee would have to wait.

Under Secretary for Management Patrick Kennedy and Southern Command Deputy Commander Ambassador Paul Trivelli hastily organized a task force in Washington to deal with the crisis. Much of my night was spent in long conversations with them. They asked if the airport was open. The lights of private planes could be seen taking off regularly as anyone rich enough to get away from the apocalypse was loading their families, in some cases their injured, into their own aircraft and flying them to Santo Domingo or Miami, or any place where the earth didn't shake.

Three embassy houses on a ridgeline had collapsed and slid down the hill. Our human rights officer and her husband and the noncommissioned officer from the defense attaché's office were trapped in the rubble. Their neighbor, Security Officer Pete Kolshorn, and a couple of Haitian guards worked tirelessly into the night to rescue them. With violent aftershocks rearranging the rubble every 15 minutes, the rescue operation put the rescuers' own lives at risk. But they persisted and got their injured comrades up to the top of the ridgeline. All three had broken bones and open wounds. During the two hours it took to get them out of the rubble, we sent a scout to the three

Three embassy houses on a ridgeline had collapsed and slid down the hill.

hospitals in town. All three were overwhelmed and would not even open their gates to us.

A Haitian doctor who lived nearby gave initial attention to our three wounded colleagues and helped Kolshorn move them several blocks through rubble to the main street. An embassy roving patrol vehicle that had been trapped up in the highlands managed to meet the party on the other side of the rubble. The Haitian doctor advised moving them to the clinic of a plastic surgeon he knew in Petionville. It wasn't ideal, but it was our only choice. The doctor asked us to send oxygen tanks because one of the male patients had a collapsed lung.

In the expectation that one of our drivers would find a way through the rubble that separated the embassy from Petionville, I asked Dr. Steve Harris, the head of the Centers for Disease Control and Prevention office in Port-au-Prince who had set up a provisional hospital in the embassy's health unit, to get me all the oxygen, morphine and casting supplies he could spare. There were only two tanks of oxygen. That would not be enough to keep the male patient alive, the Haitian doctor told me; but it was all we had, and we dispatched the driver with the supplies.



Through the night more and more wounded came to the embassy looking for help. One of the ambassador's bodyguards with open wounds and broken bones came carrying his infant son who had multiple fractures. His wife and other children had all been killed when their house collapsed.

By midnight we still had not located a large number of embassy personnel. With so many streets blocked by rubble, it was a real challenge to reach them. Assistant RSO Rob Little offered to take his motorcycle and go looking house by house. Rob knew Port-au-Prince better than any of us, and at 6 foot 6, he was intimidated by nothing. For the next two hours he drove around the neighborhoods where embassy people lived, assembling them in areas where they could be picked up by our vans as soon as the roads were cleared. Some of the embassy homes had been completely destroyed, but their occupants were miraculously spared. Several officers sustained injuries that

Hundreds of human figures silhouetted against the rising sun picked through the ruins brick by brick, stone by stone.

were not life-threatening, but required evacuation as soon as we could get flights in the next days. For those huddled together in the dark front yards of ruined houses waiting for an embassy van, it must have been a very long night.

Around 2 a.m. I noticed that the embassy cafeteria had been turned into a makeshift hospital. Americans from all over Port-au-Prince had come looking for help. Some were sleeping on the floors; others were lying on cafeteria tables with IV lines stuck in their arms. A young American woman in her early 20s who had bandages all over her head and shoulders wandered listlessly around the cafeteria.

Back in my office, I was beginning to get emails asking for help. An employee of our embassy in Guatemala asked if I could locate her husband, who was a captain in the Guatemalan Army working as a staff officer with the United Nations peacekeeping force. The wife of a good friend in Nicaragua wrote that her daughter was at the Montana Hotel with a group of volunteers from Lynn University. We were able to evacuate the Lynn University student the next day, and both stories eventually had happy endings.

In every call with the task force in Washington, I would ask for helicopters from Guantanamo at first light to evacuate our injured. After a few hours they told me to expect a helicopter at 8 in the morning. The drivers took the seats out of two vans so that we could put stretchers in the back, and then drove up to the clinic in Petionville. We would be ready to move our three critically injured colleagues to the embassy by 8 a.m.

Washington, in exchange, kept asking for firsthand information on the airport. At around 4 a.m. the RSO put together a security escort, and we drove to the airport. We drove through the dark and quiet streets of Tabarre, but even the darkness couldn't conceal the homes and stores and a large hotel collapsed into heaps of rubble like so much crumpled paper. In the parking lot of the airport we found a group of American college students. Terrified by the events of the night, they were hoping to catch the first flight out. We convinced them to go get some sleep at the embassy.



The first rays of sunlight began to lighten the sky as we pulled out of the airport parking lot. The narrow streets of the city center were hopelessly clogged with rubble, so we diverted to the slum of Cité Soleil, where the embassy funded a model community policing program. The small homes with tin roofs of the neighborhood appeared to have weathered the earthquake well, but the schools, churches and other public buildings had succumbed to the weight of their heavy poured-concrete roofs. We passed the police station that the embassy had built at great cost. It looked intact.

Further on, we came to a barricade manned by Bolivian troops of the U.N. stabilization mission MINUSTAH. They were waving everyone away. Our armored motorcade with diplomatic plates gave them pause, and they let us through. We had hardly gotten through the barricade when I saw why they didn't want traffic on the street. The barracks of the Brazilian U.N. military unit had collapsed, and Brazilian soldiers were swarming the building like ants, removing the rubble to get to their trapped comrades. Hundreds of human figures silhouetted against the rising sun picked through the ruins brick by brick, stone by stone. I later found out that 15 Brazilian peacekeepers lost their lives in that building.

Back at the embassy we dispatched vans to pick up our American personnel scattered all over the city. It was almost 8 o'clock, and Washington assured me again that a helicopter would arrive to evacuate our wounded. A U.S. military officer with compound fractures was being brought down the mountain by Drug Enforcement Administration Chief Darrel Paskett to be evacuated. The two vans with our critically injured Human Rights Officer Kathey-Lee Galvin, her husband and the defense attaché's staff member were on their way. We received word that the helicopter would only land if we could secure the soccer field adjacent to the embassy. RSO Lesniak grabbed an AR-15, and the two of us headed out to the soccer field. Steve stood prominently at guard so the helicopter crew would know that we had secured the field. The bright sunshine and warm tropical morning felt good after a sleepless night.

Right at 8 o'clock we saw an orange-and-white U.S. Coast Guard helicopter approaching the embassy from the northwest. Once landed, the aircrew looked nervous. They had had a long, two-hour flight across the Windward Passage, and perhaps expected to encounter a riotous scene. They said they couldn't stay long on the ground and asked where the injured U.S. military officer was. I told them that he was on his way down the mountains, but that our three injured embassy personnel

were in the waiting vehicles and could be loaded aboard the helicopter immediately. They agreed to load them up. Both male patients had many broken bones and had been given morphine to calm the pain. Neither responded to me nor gave signs of consciousness.

I walked over to check on Kathey-Lee, who had been strapped to a gurney and was nestled into a large neck brace. Her face was black and blue, and she had contusions running up to the line of her wavy red hair. She responded to my greeting with a sober sense of humor that made me realize she hadn't touched the morphine I had sent up to the clinic. We exchanged stories of our longest night and news of our colleagues. As the stretcher bearers carried her to the helicopter, I asked Kathey-Lee why she hadn't taken any morphine. "At a time like this, I want to be the one making the decisions!" she replied.

The helicopter crew wanted to leave, but they wanted to take the injured military officer with them, and he hadn't shown up. I asked if we should pre-position another patient in the event the injured colonel didn't make it to the airfield in time. When they

agreed, I sent for the young American woman who had come to the embassy with a head injury the night before; but it took a few minutes to find her. The crew chief said they didn't have a medic on board, and that in view of the serious injuries of the three embassy personnel, they needed to depart immediately. Even if the other patient were there, it was unlikely they would be able to take her due to weight considerations, he said. Just then a vehicle pulled up and the young woman got out. She was in bad shape and walked slowly. When the flight crew saw her, they realized they couldn't leave her behind. They helped her to the helicopter and strapped her in a back seat. The crew chief turned to me and promised to return for more patients in the afternoon.



I rejoined Steve Lesniak and his long gun on the knoll next to the embassy. The helicopter lifted gracefully off the dusty soccer field as we stood and watched till it disappeared out of sight.

The long night of Jan. 12 was over, but our work had just begun. ■



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The 2010 Haiti Earthquake

The USAID mission director in Haiti at the time of the earthquake reflects on the disaster and its aftermath.

BY CARLEENE DEI

Tremblement!

I arrived in Haiti at dusk on Jan. 11, 2010, approximately 24 hours before the country was hit by a devastating 7.0 magnitude earthquake whose epicenter was just outside the capital of Port-au-Prince. I was driven to the house that had been assigned to me, a lovely villa located on the side of a ravine, deposited my luggage and went to bed. (I never saw that house again because part of it slid into the ravine when the earthquake hit the next day.)

On the morning of Jan. 12, I started work at the USAID Mission that was co-located with the U.S. embassy. I was introduced to my



Carleene Dei currently serves as an assignments and career counselor to the senior leadership group of USAID's Bureau for Human Capital and Talent Management. She was the mission director in Haiti from 2010 to 2012, overseeing the U.S. \$1.3 billion multiagency response to the 2010 Haiti earthquake. She also served as mission director for USAID Southern Africa (2005-2010) and as the mission director for USAID's West Africa Regional Mission (2001-2005).

colleagues, all of whom welcomed me warmly and helped me get settled in. That afternoon, a co-worker offered to take me to the local supermarket so I could stock up on supplies. I was running late, and apologized profusely for making him wait 20 minutes while I tried to organize myself for the next day. In retrospect, my tardiness saved our lives, because the supermarket that was our destination was demolished by the quake.

We were about 500 yards from the embassy when the car began to shake erratically. My first thought was: "What a terrible driver!" Then I heard the driver shouting, "Tremblement! Tremblement de terre." I am fluent in French, but I had not used it in seven years, and it took my brain a moment to decipher his cries. Earthquake! Earthquake! It felt as if the car shook for minutes (I later learned that it was only 30 seconds). All around us the world was enveloped in a cloud of gray dust as cement buildings crumbled, and there was a constant thudding sound as houses and trees collapsed. People ran down the street screaming in terror as they tried to flee the quake. We turned around and slowly made our way back to the embassy. Stunned, I retreated to my office in the embassy that, because it was built to withstand a magnitude 9.0 earthquake, would serve as my home for the next six months.



Local workers clear the rubble brick by brick. Inset: This is what the terrain in Port-au-Prince looked like after the earthquake. The houses, built on hillsides around the city, all had cement roofs to withstand hurricanes, but the walls were not properly supported with rebar. As a result, they collapsed—“pancaked” was the term used—killing whoever was indoors.



USAID/KENDRA HELMER

In the Rubble

It is impossible to adequately explain the effect of the earthquake on myself, my colleagues, the U.S. embassy and the city of Port-au-Prince. Every single person in the city lost close friends and family members. The final death toll was estimated to be 230,000, out of a total population of three million. Most individuals lost their houses entirely or experienced significant damage. Everyone slept in the open air out of fear of being inside when one of the interminable aftershocks took place. Port-au-Prince and the nearby towns were covered in piles of rubble; and within 48 hours the city was permeated with the smell of rotting flesh. The situation was exacerbated by the fact that access to the city was severely restricted: The airport was nonfunctional (the control tower and the runways were damaged), roads had become impassable and the port was unable to service ships and containers.

The U.S. government knows how to deal with disasters. Within days, the U.S. Army, under the command of a three-star general, had arrived. They repaired and reopened the airport, cleared the roads to the Dominican Republic (a source of supplies) and made the port functional. Working in close collaboration with them was a USAID Disaster Assistance Response Team that, with dazzling efficiency, set about distributing emergency supplies—food, water and tents to desperate survivors—while working in close collaboration with hundreds of volunteer medical personnel who treated the thousands of wounded survivors under less-than-ideal circumstances. The patience and empathy exhibited by these individuals cannot be overstated.

At previous posts, I had been responsible for managing large programs. I was mission director in South Africa, where we established and implemented HIV/AIDS programs worth hundreds of millions of dollars and issued housing guaranty loans that resulted in the construction of tens of thousands of houses

and associated urban infrastructure. In Haiti, I and most of my USAID colleagues were in a state of shock. We found ourselves tip-toeing around the building and checking with each other as to whether every aftershock was real or imagined.

Most U.S. direct-hire staff members (above all, those with children) chose to leave immediately, once the airport was reopened. Some came back once things had calmed down. Others, who had not been initially posted to Haiti, volunteered to come and help us manage the \$1 billion in funds we received for earthquake relief. It helped immensely that our ambassador, who had been posted in Haiti previously, spoke fluent Creole and was on a first-name basis with everyone: from the country's leaders to the parking attendant at the local supermarket. His calm demeanor throughout the entire post-earthquake period was a critical element in keeping us going. Like the rest of us, he had sent his family home and was living in his office with a small beagle named Sophie, who would lie on his desk and listen attentively during staff meetings.

A Drop in the Ocean

Under normal circumstances, a billion dollars will go very far. In Haiti, it was a drop in the ocean. What it did was keep people alive post-earthquake by providing the absolute basics, the above-mentioned food, water, tents and porta-potties (things that are fungible and not easily catalogued). This point was brought home to us when a number of congressional delegations visited Haiti and announced that they saw little to no evidence of U.S. government money that was supposed to have been spent on reconstructing the areas that had been hit.

I should point out that since most residents of Port-au-Prince lived on hillsides around the city in settlements that lacked properly constructed roads and basic services, the earthquake produced mountains of rubble because of the

Haiti's recovery was also complicated by the outbreak of a cholera epidemic (a disease that was previously unknown there).

total collapse of houses built with unreinforced concrete. More importantly, lack of vehicular access to these areas meant that rubble had to be removed by manual laborers supplied with buckets: a spectacularly inefficient way of clearing the town. It was a monumental task just to get to the areas that had been hit, much less clear and reconstruct them.

Despite the challenges, USAID/Haiti identified housing construction projects on the outskirts of Port-au-Prince and in the north of the country (in Cap-Haïtien) as one method of reducing the congestion in central Port-au-Prince. The housing project in the north was part of a larger interagency employment-generation effort involving the construction of a garment factory and a power station. USAID did build thousands of small housing units equipped with water, sanitation and electricity in the north, as projected. We could have done more in the greater Port-au-Prince area, but construction in Haiti is hindered by land tenure issues. As a colleague once observed: "Here, every parcel of land is owned by at least three people—all of whom have the legal documents to prove unequivocally that it is theirs." This translated into endless hurdles as we went about trying to identify land where we could construct new units.

Haiti's recovery was also complicated by the outbreak of a cholera epidemic (a disease that was previously unknown there). The epidemic was attributed to the arrival of United Nations troops who had come to the island to help with stabilization efforts. Some of these individuals were from parts of Asia where cholera was endemic. The Haitian firm that had been contracted to empty the latrines in the barracks where the troops were stationed had decided to dispose of the contaminated waste by simply dumping it into the Artibonite River: the source of water for tens of thousands of Haitian households.

Within weeks, the epidemic exploded within a population that did not recognize the symptoms of cholera and frequently waited too long to seek medical help. An estimated 812,000 people contracted the disease, and more than 9,400 died before the disease ran its course. The final indignity that fateful

year was a hurricane. Like most residents of the West Indies, Haitians are intimately acquainted with these storms. But by late summer 2012, most Haitians had run out of their fabled resilience, and they simply hunkered down in structures that were still intact and prayed that this, too, would pass. The storm did pass, and the damage was minimal (in large part because there was not much left to damage).

Much Remains to Be Done

I sincerely wish I could announce that we had successfully met and overcome the challenges facing this country where people are warm and welcoming, and where art and culture flourish in an infinite number of ways. But there still remains much to do.

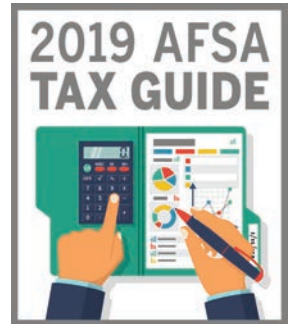
The provision of basic government services is still highly problematic, and environmental degradation looms large as forests and mangrove swamps are decimated and topsoil erodes. Violent eruptions in the form of blockades and burning tires remain the principal way for citizens to express their anger at the country's rulers and managers, and their frustration with the lack of available options for getting ahead. I cannot help but contrast this anger and volatility with the generous people who, during the months that I lived in my office, brought me pumpkin soup and plates of rice and beans, or deposited a ripe mango on my desk—all without being seen or seeking to be thanked.

I departed Haiti in the summer of 2012 and went to West Africa to fill in as acting USAID mission director. I remember congratulating myself on the fact that I had dealt rather well with the stress engendered by my tour in Haiti. I maintained this belief until four years later, when I happened upon a video of a post-earthquake press conference where U.S. government agencies were discussing how they were handling the post-quake situation. I observed to my horror that throughout the entire 30-minute press conference, I was moving my head back and forth like a hypnotized cobra.

It was at that moment that I realized I had not, in fact, gotten through the earthquake unscathed. In retrospect, this epiphany also shed light on the onset of shingles followed immediately by a rare autoimmune condition that I succumbed to 18 months after leaving Haiti. Indeed, the price of living through the earthquake was much higher than my initial estimate. That said, understanding what had taken place also put into perspective the full measure of support that I received from colleagues who, despite their incalculable losses (families, friends, houses, basic services), reached out to me and supported me during one of the most challenging periods of my life. ■

AFSA Welcomes Launch of Diplomacy Museum

AFSA President Eric Rubin Joins Board



CALENDAR

January 1
New Year's Day
AFSA Offices Closed

January 8
12-2 p.m.
"The New TSP:
What You Need to Know"

January 15
12-2 p.m.
AFSA Governing
Board Meeting

January 20
Martin Luther King Jr. Day –
AFSA Offices Closed

January 23
Webinar: "The View
from Washington"

January 29
Retirement Planning
5-10 Years Out

February 12
Webinar: "Reviewing Your
Retirement Plan"

February 17
Presidents' Day –
AFSA Offices Closed

February 19
12-2 p.m.
AFSA Governing
Board Meeting

March 16
Deadline: AFSA
Scholarship Applications

April 8
12-1:30 p.m.
"Demystifying the
Transportation Process"

May 1
Foreign Service Day / AFSA
Memorial Ceremony



A preview exhibit, "Diplomacy Is Our Mission," opened in November at the National Museum of American Diplomacy in Washington, D.C.

AFSA President Eric Rubin has joined the board of the Diplomacy Center Foundation, the private-sector partner to the U.S. Department of State in creating the National Museum of American Diplomacy, which announced its name change from the U.S. Diplomacy Center at a gala on Nov. 5.

The Nov. 5 event also commemorated the 30th anniversary of the fall of the Berlin Wall and staged an exhibit next to the large piece of the wall that the museum has in its collection. In addition, the event launched a new "preview exhibit" that will be on display through 2020. Called "Diplomacy Is Our Mission," it was cre-

ated in conjunction with the Smithsonian Institution. It includes stories and artifacts of American diplomacy with "pods" dedicated to four main themes: security, prosperity, democracy and development abroad.

Tours of the exhibit are available every Friday, with timed entry passes available through the museum's website at diplomacy.state.gov.

"I have been involved with this project since its inception, and I am thrilled to have the opportunity to join the foundation's board to help see the museum project to completion," President Rubin said. "AFSA is glad to be an active partner in achieving the vision

of the museum's founders and creators."

The National Museum of American Diplomacy, the first museum dedicated to telling the history, practices and challenges of American diplomacy, is scheduled to open in 2022 at the State Department's headquarters in Washington, D.C. The foundation is currently

raising funds for completion of Phase 2 of the museum development project.

Prior to the installation of the preview exhibit, the Diplomacy Center hosted rotating exhibits on a wide variety of topics in its 20,000-square-foot pavilion at the south entrance of Main State. From March 2019 through Foreign Service Day in May, AFSA's *Foreign Service Journal* Centennial Exhibit, "Defining Diplomacy for 100 Years," was on display.

At the Nov. 5 gala, copies of the November special edition of *The Foreign Service Journal*, with a focus on the fall of the Berlin Wall through the eyes of U.S. diplomats, were given out to guests. ■



Professional Liability Insurance: Peace of Mind in a Troubled Time

We have previously written about the importance of having professional liability insurance (see the July/August 2016 *FSJ*, bit.ly/fsj-liability). And our advice remains the same: Yes, absolutely get it!

Liability insurance is intended to provide legal representation and indemnity protection against the risks and financial consequences of a claim or allegation arising from the performance of one's job duties.

Not Just for SFS

This kind of insurance is not just for senior-level Foreign Service members. At every level, consular officers, economic officers, management officers and diplomatic security agents make decisions and take actions every day that can affect the people they work with or the public.

Such decisions or actions could include declining to issue a visa, interacting with American companies, launching a security investigation and more. Foreign Service employees may be investigated or sued for carrying out their official duties.

The State Department encourages the purchase of professional liability insurance, and even has a policy in place to reimburse supervisors and management officials for up to 50 percent

or \$175 (whichever is less) of the cost of the premium.

Visit bit.ly/liability-guidance for department guidance on this subject. Employees can use the Claim for Reimbursement for Expenditures on Official Business form (OF-1164).

What's Covered?

Whether legal fees are covered by professional liability insurance policies for testifying before Congress during the impeachment hearings is a question our members have been asking. Disappointingly, we have heard from members who have testified that most have been denied such coverage through their liability policies.

Professional liability policies cover depositions or testimony before Congress or congressional committees *only if the policyholder is the subject of the inquiry*. However, some providers recognize that a person who is a witness one day may be the subject of an inquiry the next.

In choosing a provider, you should review the policy coverage carefully.

Ask these questions:

- What type of claims do you cover?
- Have you covered testimony before Congress or a committee? If so, under what circumstances?
- Do you provide coverage

for security clearance proceedings? If so, under what circumstances?

- Do you provide free legal consultations for pre-complaint or other matters?
- Who does your legal work? (You will want to ensure that the insurance company assigns an attorney who has the requisite legal expertise and experience.)
- What is the financial rating of the underwriter of your company? (You will want to know the underlying financial strength of the company.)
- For those contemplating switching from one insurance company to another: Do you provide coverage for events that occurred prior to the effective date of coverage?
- Do you provide coverage after I leave federal service? For how long?

Who Is My Lawyer?

It is the government's decision whether to represent the employee. In most cases, your agency will represent you if you are sued for performance of your duties or called to testify before Congress or a committee.

But if the agency does not believe you were acting within the scope of your employment; if your interests and the agency's do not coincide; or as we have seen during the recent impeachment inquiry, if agency attorneys are not permitted to attend the pro-

ceeding, the government may not represent you.

Even if your agency will provide a government attorney, the attorney represents the government, not you. Finally, if your agency is investigating you or proposing discipline against you, it will obviously not represent you.

AFSA represents members in noncriminal investigations by the Office of Inspector General and the Bureau of Diplomatic Security's Office of Special Investigations, as well as disciplinary cases and grievances.

While AFSA's staff attorneys are experts in federal employment law, they do not have the specialized expertise required to represent members in criminal cases, civil litigation or in congressional hearings.

While AFSA can represent you in most cases that may arise in the course of your career, we believe it is prudent to have professional liability insurance for those rare instances in which we cannot.

If You're Denied Coverage

If your insurance company denies coverage, please contact AFSA Labor Management (afsa@state.gov), and we will see how we can assist you.

For more details on PLI, see bit.ly/afsa-liability.

A list of PLI companies is at afsa.org/insurance-plans. ■



Get Ready ... Get Set ... Hire! (But Please Focus on the “Get Ready” Part)

USAID is hiring Foreign Service officers. Nope, that’s not a typo: the agency is really hiring Foreign Service officers. A small but mighty class of 22 came on board this past September, and there are plans (and congressional pressure) to hire another 150 officers, plus or minus, through 2020.

As of last March, USAID had about 1,700 FSOs on board. The 2020 Foreign Operations Bill calls for 1,850 permanent FSOs. Hiring 150 new FSOs through 2020 is big! I’m quite concerned, however, that the agency isn’t ready to recruit, train, orient and manage this flow of new career FSOs, particularly as energy continues to focus on Transformation.

The hiring freeze in 2017 and early 2018 did not help the agency as a whole, and it certainly did not help the USAID Foreign Service. We have long been below our target numbers, particularly as our role (and budget) has grown in the post-9/11 world. (Frankly, even 1,850 is a low number when you think about all we do.)

As a result of consistently being understaffed, USAID FSOs are often denied professional growth opportunities such as short- and long-term training and details to external private organizations and other agencies. In

addition, far too many staff members at missions are serving in acting capacities in positions far above their pay grades for extended periods. Stress is rising, and that can affect our work and impact.

This new hiring initiative is long past due—but it will be some time before new staff are on board and ready to assume duty. Career FSOs know that great officers aren’t born, they develop over time.

In the meantime, the agency should do all that’s possible to put in place the operational and support systems required for such a large hiring push—including the workforce planning analysis necessary to determine which backstops to hire (and let’s not all just automatically say “contracting officers!”—though, of course, we need COs).

All USAID FSOs have their own stories of the challenges they faced in joining the agency—misplaced forms, hurry-up-and-wait messages on a start date, security/medical clearance processes, low-ball salary offers (“We all take a salary cut!” is a common refrain), creditable time not being credited, professional peers entering at a higher (or lower) level with no rationale, recruitment incentives paid (or not paid) to one class (or

I would envision a core staff of career USAID employees with the knowledge, depth and authority to facilitate FSO recruitment, on-boarding, training, professional career development and retirement.

person) and, well, add your own story here!

Many of these common stories are linked to the hardworking but chronically under-resourced Office of Human Capital and Talent Management. Many more tales of woe are caused by the lack of systems and standard operating procedures—wheels are re-created, broken, re-created, lost, re-created, contracted and re-created.

Staff are too often (and even once is too often) told, “If you don’t like it, then leave. There are plenty of others waiting to enter the agency.” What other words could more quickly demoralize new entrants? I can’t think of any. (Many of us more seasoned USAID FSOs are pretty much inured to such words—but that doesn’t make hearing them any better.)

What’s to be done? Well, a lot. AFSA would like to see USAID establish, staff, sustain and institutionalize an FSO recruitment, retention and retirement unit that doesn’t disappear when the

International Development Intern, New Entry Professional, Development Leadership Initiative and Career Candidate Corps programs end. This unit would not be bureaucratically cannibalized for other duties if hiring slows—it would be present throughout an FSO’s career.

I’m no HR expert, but I would envision a core staff of career USAID employees with the knowledge, depth and authority to facilitate FSO recruitment, on-boarding, training, professional career development and retirement. We all know that as FSOs, we are on duty 24/7 when in the field. But really, we—and our families—are living the FSO life all the time. It is not just a career—it is a life choice of challenging and rewarding public service, and we are privileged to live out our commitment to both the United States and to improving the world.

We are willing to make the sacrifices that come with this choice. USAID should be ready to support us. ■



The Foreign Service by the Numbers

The start of the new year seems like the perfect time to update our members with recent facts and figures on the U.S. Foreign Service.

The information comes in handy for AFSA's Speakers Bureau members who volunteer to tell the story of the Foreign Service. But it's also useful for active-duty members, whether they are writing testimony for a principal or submitting an article to *The Foreign Service Journal*.

Personnel Numbers.

Let's start with the Foreign Service itself. The Foreign Service is in 276 posts abroad, and FS members spend, on average, two-thirds of their careers overseas. The latest personnel numbers show that the Foreign Service as a whole, counting all agencies, stands at approximately 15,600 members.

- State is the largest group at the end of Fiscal Year 2019, with 13,790 Foreign Service members: 7,999 generalists and 5,791 specialists (consular fellows are counted by State Human Resources as specialists).

- USAID has nearly 1,700 FSOs, with plans to hire 150 more.

- The Foreign Commercial Service has 229 members at more than 75 posts worldwide.

- The Foreign Agricultural Service has 150 to 165 FS personnel and APHIS has approximately 40, with FAS aiming for 20 or more new

FS trainees in its December 2019 assessment process.

- The U.S. Agency for Global Media has about 20 to 25 Foreign Service employees worldwide.

For comparison's sake, the Department of Defense has 1.3 million active-duty military members and about 800,000 reservists.

Diversity. The Foreign Service recruits with diversity and inclusion in mind, and benefits from Pickering, Rangel and Payne (USAID) fellowships and other programs, which bring in about 100 Foreign Service members per year.

Diversity levels at recruitment and at lower grades are encouraging. As FS members rise through the ranks, however, the number of minorities and women thins out.

For example, at the end of FY2019, minority representation in State's Senior Foreign Service was low. As of Sept. 30, African Americans comprised 2.9 percent of the Senior Foreign Service, Hispanic Americans 5.3 percent, and Asian Americans 3.6 percent.

In the words of AFSA President Eric Rubin, "We can do better. We must do better." To that end, the AFSA Governing Board has created a Committee on Diversity and Inclusion, so AFSA can better monitor this phenomenon.

Attrition. AFSA continues to be concerned with attrition numbers (via retirement

and voluntary or nonvoluntary resignation), which can be affected by many factors, including the existence of a diversity-friendly culture (or lack thereof), management policies and leadership, and the availability of senior opportunities (or lack thereof).

State has informally told us that attrition remains within historical annual averages (3 to 4 percent for FSOs; 4 to 6 percent for FS specialists), but these figures were gathered before the last quarter of the calendar year, when most departures take place. We will know more in the first months of 2020.

We have some anecdotal evidence that in smaller Foreign Service constituencies, attrition is higher than normal. Baby boomer retirements could play a part, but so could poor management or management bias, especially in cases of mid-level attrition.

FSOT. Over the past year, much attention has been paid to the number of test takers for the Foreign Service Officer Test, which is usually seen as a proxy for interest in a Foreign Service career. In calendar year 2019, 9,294 people took the FSOT—not unusual if we look at the past 20 years or so. The test is given in February, June and October.

Over the past two decades, there have been many calendar years in which

test takers numbered in the 10,000 to 20,000 range, totals that appeared also in the 1980s and 1990s. (The anomalous year of 2002—after the 9/11 attacks—saw 31,000 test takers.)

Only two times in the past 20 years were the calendar year FSOT test-taker totals below 9,000—in 2000 and 2008.

This is probably because the economy was roaring just before the dot-com bust and the financial crisis (or Great Recession), respectively; there tends to be an inverse correlation between the job market and FSOT test-taker numbers.

In general, if FSOT totals trend below 9,000, AFSA starts to worry. This year, though June figures were below 3,000, October numbers kept the annual total above 9,000.

AFSA will continue to track data relevant to the Foreign Service, particularly attrition and diversity numbers. One of AFSA's primary roles in the past few years has been to provide unbiased information on the U.S. Foreign Service to all who ask, and we will continue to take that role very seriously.

Please feel free to reach out to me or to my Labor Management colleagues with your questions about the Foreign Service. Happy New Year! ■

What the Hatch Act Means for You

With the 2020 elections just around the corner, now is a good time to brush up on how Hatch Act guidelines might affect your political activities. Congress passed the federal law, which concerns most executive branch employees, in 1939 and most recently amended it in 2012.

According to the Foreign Affairs Manual, “a U.S. citizen employee, spouse, or family member shall not engage in partisan political activities abroad, other than authorized activities pertaining to U.S. elections” (3 FAM 4123.3).

In 2016 the State Department Office of the Legal Adviser issued guidance

on the Hatch Act to State Department employees. It lists what Foreign Service officers and their family members can and cannot do under the Hatch Act. A copy of the memo is available at www.afsa.org/hatchact.

For example, permissible political activities include making financial contributions to political candidates or parties within legal monetary limits, assisting in nonpartisan voter registration activities, and campaigning for or against nonpartisan political issues such as referendum questions, constitutional amendments or municipal ordinances.

But Foreign Service employees or members may not engage in any political activity while on duty. And some activities permissible while living in the United States are not allowed when living overseas, including holding a position in a partisan campaign or circulating a partisan nominating petition.

A common question is what kinds of political activities on social media are allowed under the Hatch Act. Posting, sharing, liking, tweeting or emailing pages or content supporting or opposing a partisan candidate, political party or

partisan political group is never allowed while on duty. Neither is referring to your official title or position while engaging in political activity on social media. But posting, sharing, liking, tweeting or emailing nonpartisan pages or content is allowed.

Additional guidance can be found at the U.S. Office of the Special Counsel website at <https://osc.gov/Services/Pages/HatchAct-AdvisoryOpinion.aspx>.

AFSA continues to follow developments on the Hatch Act and will provide any further guidance here, on the AFSA website or through our AFSAnet listserv. ■

Mike Calvert of FCS Joins AFSA Governing Board

FSO Mike Calvert has joined the AFSA Governing Board as a Foreign Commercial Service representative.

Mr. Calvert joined FCS in 2008 and is currently serving in Washington, D.C., in the Office of the Middle East and Africa, where he works on infrastructure development. He also serves as desk officer for Egypt.

Previously, Mr. Calvert served in Honduras and



Mike Calvert.

South Africa, as well as in the Office of the Deputy Assistant Secretary for the Western Hemisphere.

Prior to joining Commerce, Mr. Calvert was a

political staffer at the Illinois General Assembly. He earned a bachelor's degree in political science from Northern Illinois University and a master's degree in international relations from the University of Chicago. ■

Sue Bremner Joins AFSA Staff: USAID LM Adviser

Sue Bremner, the new USAID Labor Management adviser, retired in 2019 from the Foreign Service. During her 30 years with the State Department, she served as chief of mission at two embassies and served in Asia, Europe and Africa, as well as domestically.

Throughout her career, Ms. Bremner has supported colleagues who have felt themselves to be victims of institutional inflexibility or bias in contravention of Equal Employ-



Sue Bremner.

ment Opportunity protections, helping them identify formal avenues of remedy.

She looks forward to ensuring due process and encouraging timely institutional responses to people

seeking clarification of their entitlements. She has been a proud member of AFSA since her first days as an FSO.

Ms. Bremner's office is in the Ronald Reagan Building, 3.09-D, in Washington, D.C. She can be reached at (202) 712-1941. ■

AFSA Panel: U.S. Diplomats as the First Line of Defense

From weakening ISIS to taking down international child pornography rings, U.S. diplomats play a large role in protecting Americans back home.

During an Oct. 29 AFSA panel discussion at DACOR Bacon House in Washington, D.C., four ambassadors, a Diplomatic Security agent and a Foreign Service officer from the U.S. Department of Agriculture's Animal and Plant Health Inspection Service shared tales of how they and their colleagues protect American security. The panel was called "The First Line of Defense: How Diplomats Protect American Security."

Ambassador Greg Delawie, the top U.S. diplomat in Kosovo from 2015 to 2018, noted that on a per capita basis more citizens from Kosovo were joining ISIS in the early 2010s than from any other country. The embassy worked closely with the government of Kosovo to devise solutions.

For example, the Bureau of International Narcotics and Law Enforcement Affairs coordinated with Kosovar law enforcement and prison systems to ensure ISIS fighters who returned to Kosovo served prison sentences while not becoming further radicalized in prison. The effort significantly reduced the number of jihadis who returned to the battlefield.

Kala Bokelman, a Diplomatic Security supervisory special agent, shared how



AFSA President Eric Rubin, at podium, introduces the "First Line of Defense" panel at DACOR Bacon House in Washington, D.C., on Oct. 29. Seated from left: Greg Delawie, Kala Bokelman and Jefferey Austin.

DS collaborates with foreign governments to fight transnational criminal organizations. While stationed in Costa Rica, she worked with local authorities to take down an international child pornography ring that was using the country as a hub for its activities.

Leveraging her strong professional relationship with a Costa Rican prosecutor and the expertise of the embassy country team, including fellow DS agents, the political section and INL, she persuaded the Costa Rican government to not only put stricter laws on the books regarding trafficking, but also bring best practices to the apprehension, capture and sentencing of the criminals.

Jefferey Austin, a Foreign Service officer with APHIS, shared the agency's work with Central American governments to eradicate the New World screwworm, the larva of a fly species that infects cattle, jeopardizing America's herds and ranch-

ers' livelihoods.

After having eradicated the fly from the southwestern United States and Mexico with a sterilized fly release program, U.S. Foreign Service officers from APHIS, using U.S. funding and in coordination with their Panamanian

counterparts, created a biological "barrier" to further northern infestation on the Panama-Colombia border.

A major element of the virtual barrier is a U.S.-built plant, the only one in the world, that breeds the sterilized flies and provides them to the region's eradication programs.

Also speaking at the panel were retired ambassadors John Heffern, Deborah Kay Jones and Charles Ries.

In introducing the panel, AFSA President Eric Rubin noted that the role of the Foreign Service as America's first line of defense will be a focus of AFSA's messaging in the coming year.

A video of the panel event can be found at www.afsa.org/video. ■

Ásgeir Sigfússon Named Executive Director of AFSA

AFSA is pleased to announce that long-time employee Ásgeir Sigfússon has been selected as the association's new executive director.

Ásgeir most recently served as AFSA's director of communications and membership. He brings a deep knowledge of AFSA and its people to the position and looks forward to keeping AFSA a great place to work and a membership organization that is always



Ásgeir Sigfússon.

highly responsive to its members.

A native of Iceland, Ásgeir was born in Copenhagen and moved to the United States in 1997 to begin undergraduate studies at the University of Pennsylvania. He arrived in Washington, D.C., in 2001 for a two-year master's program at Georgetown University's School of Foreign Service. In 2003, he joined AFSA as a full-time employee and has been with the association ever since. ■

“Next Stage” Panel: Post-Foreign Service Careers for Diplomatic Security Agents

On Oct. 18, four former Diplomatic Security agents explained how they have successfully parlayed their unique skills into related professional fields during AFSA's latest Next Stage panel, “Post-FS Careers for Diplomatic Security Personnel.”

The panelists were Justine Sincavage, a senior security consultant at State who previously served as the assistant chief security officer of global security operations for General Electric; John Rendeiro, senior adviser to International SOS Assistance; Erik Antons, vice president of global security for Hyatt Hotels Corporation; and Glen Gershman, vice president for global safety and security for Laureate Education.

All panelists agreed that DS personnel are enviably marketable, with experience in advising chiefs of mission (which translates to a comfort level in advising chief executive officers), language skills and a service mentality, which is critical in the private sector.

They cautioned, however, that most private-sector companies have a lean matrix-like structure, and that it's important to explain that DS, particularly overseas, mirrors a less hierarchical structure than is usually associated with government.

The panelists offered extensive practical advice. They agreed that it's impera-



From left: John Rendeiro, Justine Sincavage, Glen Gershman and Erik Antons at an AFSA panel on post-FS careers for DS agents on Oct. 18.

tive to translate DS work into the different lexicon of the private sector. Mr. Rendeiro advised audience members not to forget to share stories of their work, which generally are fascinating and reveal the level of professionalism typical of DS. Networking while still in active duty is key to opportunities post-FS, panelists said.

When asked about challenges during the first years of transitioning, Mr. Antons suggested that if hired correctly, people will struggle during the first year, hold their own in the second and be on positive ground in the third. The panelists agreed it is not uncommon to move into a lateral position, and said it is important to look at entire compensation packages, not just the salaries, to make apt comparisons.

Mr. Gershman underscored the importance of going into a job search with eyes wide open. A company in the private sector tends to look at its employees as cost centers and how they contribute to the bottom line.

Ms. Sincavage emphasized that people are judged not by their effort, but by their output. Since private-sector work will probably demand more than 40 hours per week, it's essential for people to do some soul-

searching about their priorities post-FS.

Finally, Mr. Antons advised building a strong résumé—and asking for advice from a professional before finalizing it. Make sure to know the right buzzwords and apply widely to jobs even if their descriptions don't sound perfect.

A video of the event is available at afsa.org/video. Stay tuned for announcements on upcoming Next Stage programs, and please contact Dolores Brown (brown@afsa.org) with suggestions and feedback. ■



AFSA Governing Board Meeting, November 20, 2019

2019-2021 Board Vision Statement: The AFSA Governing Board adopted the following vision statement for its 2019 to 2021 tenure: “At the 100th anniversary of AFSA and the Foreign Service, AFSA is an agile champion of diplomacy, advancing the needs of our Service by putting people first, reflecting a diverse workforce and enhancing modern tradecraft. AFSA has more impact with the foreign affairs agencies and more influence on Capitol Hill, enabling it to improve its members' daily lives and reassert the leadership of the Foreign Service in U.S foreign policy.”

Diversity Committee: Kristin Roberts moved to form a Diversity Committee. The Governing Board approved. Committee volunteers from the board include: Kristin Roberts, Joshua Archibald, Lillian Wahl-Tuco, Holly Kirking Loomis, Lorraine Sherman, Matthew Dolbow, Mary Parrish, Jay Carreiro, Jason Singer and Thomas Yazdgerdi.

2020 Budget: The AFSA Governing Board approved the proposed budget for 2020 as submitted. ■

Support AFSA's Legal Defense Fund

As a result of the remarkable outpouring of support from both the Foreign Service community and the American public, the AFSA Legal Defense Fund stood at \$418,465 in mid-december. Some 2,176 donors from across the nation contributed an average of \$192.



Drawing from these resources, the AFSA Governing Board recently approved \$133,000 in reimbursements to the private attorneys representing Foreign Service members who testified before the House Intelligence Committee investigating events in Ukraine.

We expect to receive additional reimbursement requests in the coming months from these and other Foreign Service members. We therefore renew our appeal for donations to the AFSA Legal Defense Fund. Donations may be made online at www.afsa.org/donate or by mailing a check made out to "AFSA Legal Defense Fund" to AFSA, c/o LDF, 2101 E Street NW, Washington DC 20037.

Additionally, we encourage AFSA members to share that link with a brief appeal for support on your own social media pages (Facebook, Instagram, Twitter, etc.). Active-duty members, please remember that computers or other resources may not be used to fundraise.

AFSA's mission is to defend the Foreign Service as a nonpartisan corps of career professionals who serve the United States

and honor their oath to the U.S. Constitution. If, in the course of their duties, our members get drawn into legal matters of institutional importance to the Foreign Service, AFSA believes that they and their families should not suffer personal financial ruin in order to pay bills for legal representation.

Any AFSA member who has been, or expects that he or she may be, called to testify in the Ukraine matter should contact AFSA immediately. Email afsa@state.gov to be connected to an AFSA attorney. Requests for assistance are reviewed by the five-member LDF Committee and must be approved by the AFSA Governing Board. ■

AFSA Plants Cherry Tree in Memory of COO Russ Capps



AFSA/CAMERON WOODWORTH



Russ Capps.

AFSA President Eric Rubin speaks on the front lawn of AFSA headquarters at a tree planting ceremony on Nov. 7. The ceremony was held to honor former AFSA Chief Operating Officer Russ Capps, who died on Aug. 19 at age 54.



AFSA/CAMERON WOODWORTH

AFSA employees and members place seeds next to the weeping cherry tree planted in honor of former AFSA COO Russ Capps.

2019 Federal and State Tax Provisions for the Foreign Service

The American Foreign Service Association is pleased to present this year's Tax Guide, your first step to self-help for filing 2019 tax returns. This informational annual guide summarizes many of the tax laws that members of the Foreign Service community will find relevant, including changes mandated by the Tax Cuts and Jobs Act of 2017, most of which were active in 2018 and will have a noticeable impact this year.

Although we try to be accurate, this article reviews complex tax issues affecting many individuals differently. Readers should always follow up with IRS product pages for each form and publication mentioned, which are designed as extensions of the PDF versions and instructions. Always check the applicability and "last reviewed" dates of these resources.

Even then, statutes and case law are the only completely authoritative sources. Many credits, deductions or other calculations (e.g., depreciation, foreign asset reporting or 1031 exchange) are best done by a professional competent in that area. Consultations with a tax professional for complete answers to specific questions are recommended; readers cannot rely on this article or the IRS website as a justification for their position on a tax return.

This year, we've added a section addressing moving expenses and traveling in the Foreign Service, the various flavors of which touch different parts of the tax code. Readers will also find information on alimony, the Foreign Earned Income Exclusion, filings related to foreign assets and income, the qualified business income deduction, home mortgage interest and many other topics important for 2019 taxes. Following the federal section is the state-by-state guide, which includes information on state domicile, income tax rates and retirement incentives.

AFSA Senior Labor Management Adviser James Yorke (YorkeJ@state.gov), who compiles the Tax Guide, would like to thank Sam Schmitt, Esq., of the EFM Law Company and Christine Elsea-Mandojana, CPA, of Brenner & Elsea-Mandojana, LLC, for preparing the section on federal tax provisions. Thanks also to Hallie Aronson, Esq., and Shannon Smith, Esq.,

of Withers Bergman, LLP, for their contributions, particularly with regard to foreign accounts and asset reporting.

Filing Deadlines and Extensions

The deadline for filing 2019 individual income tax returns is April 15, 2020. Anyone posted abroad is allowed an automatic two-month extension to file federal taxes on June 15. To use it, write "taxpayer abroad" at the top of your 1040 and attach a statement explaining that you are living outside the United States, and that your main place of business or post of duty is also outside the United States and Puerto Rico. This extension

is federal only and does not apply to some state tax return items, such as the D.C. D-30 (for rental properties and unincorporated businesses in the District). Taxpayers who take advantage of a federal extension must also check their state filing deadlines to avoid inadvertently missing them. An additional automatic extension to Oct. 15 may be obtained by filing Form 4868.

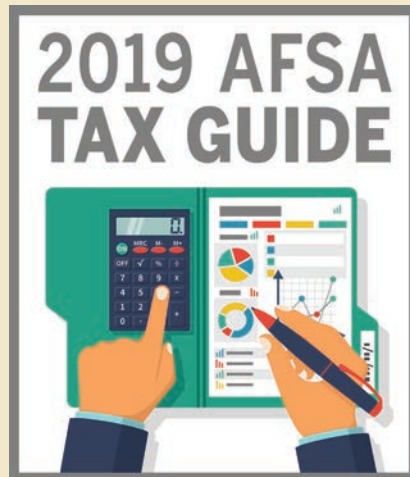
The IRS is not supposed to charge interest or late payment penalties for returns filed under the June 15 deadline for those posted abroad, but they usually do. The taxpayer generally must contact the IRS to have the interest or late penalties removed. The IRS will charge late payment penalties and interest for returns filed with payments

due under the Oct. 15 deadline, which is an extension to file but not an extension to pay.

Report All Income on the New 1040

As has been the case for decades, U.S. taxpayers must report "all income from whatever source derived" on IRS Form 1040, which has been revised again this year. Adjustments, deductions and credits remain matters of "legislative grace," so it is important to understand those statutes, regulations, forms and instructions when you claim a credit or deduction. The new 1040 is longer than last year's and is accompanied only by numbered schedules 1 through 3 and the same lettered schedules. There is no longer a tax penalty for failing to carry minimum health insurance coverage, so the check box for this item has disappeared. Commonly used tax credits, such as the earned income and child tax credits, are now on page 2 of the form.

Schedule 1: Report additional income and adjustments, e.g., tax refunds or credits, alimony received for new divorces and settlements, business income or loss (see Schedule C), real estate or other organized business income (see Schedule E), educator expenses.



2019 Individual Income Tax Rates & Brackets				
Married Filing Jointly				
Bracket	Lower Limit	Upper Limit	Max Tax Per Individual Bracket	Max Possible Incremental Tax for Income Within Bracket Range
10%	\$0	\$19,400	\$1,940	\$1,940
12%	\$19,401	\$78,950	\$7,146	\$9,086
22%	\$78,951	\$168,400	\$19,679	\$28,765
24%	\$168,401	\$321,450	\$36,732	\$65,497
32%	\$321,451	\$408,200	\$27,760	\$93,257
35%	\$408,201	\$612,350	\$71,453	\$164,710
37%	\$612,351	-	37% of Income over \$612k	\$612k + 37% of Income over \$612k
Head of Household				
Bracket	Lower Limit	Upper Limit	Max Tax Per Individual Bracket	Max Possible Incremental Tax for Income Within Bracket Range
10%	\$0	\$13,850	\$1,385	\$1,385
12%	\$13,851	\$52,850	\$4,680	\$6,065
22%	\$52,851	\$84,200	\$6,897	\$12,962
24%	\$84,201	\$160,700	\$18,360	\$31,322
32%	\$160,701	\$204,100	\$13,888	\$45,210
35%	\$204,101	\$510,300	\$107,170	\$152,380
37%	\$510,301	-	37% of Income over \$510k	\$510k + 37% of Income over \$510k
Unmarried				
Bracket	Lower Limit	Upper Limit	Max Tax Per Individual Bracket	Max Possible Incremental Tax for Income Within Bracket Range
10%	\$0	\$9,700	\$970	\$970
12%	\$9,701	\$39,475	\$3,573	\$4,543
22%	\$39,476	\$84,200	\$9,840	\$14,383
24%	\$84,201	\$160,675	\$18,354	\$32,737
32%	\$160,676	\$204,100	\$13,896	\$46,633
35%	\$204,101	\$510,300	\$107,170	\$153,803
37%	\$510,301	-	37% of Income over \$510k	\$510k + 37% of Income over \$510k

Schedule 2: Additional taxes, including those formerly on 2018 Schedule 4 (now obsolete), e.g., the alternative minimum tax (AMT), self-employment tax, household employment taxes.

Schedule 3: Nonrefundable credits and payments formerly on 2018 Schedules 3 and 5 (also obsolete), e.g., foreign tax credit, credit for child and dependent care, estimated tax payments, amount paid with a request for an extension.

To reiterate, 2018 Schedules 4, 5 and 6 are no longer valid for 2019. The lettered schedules, commonly A through E, remain.

(A) Itemized deductions, e.g., medical and dental expenses, deductible taxes and interest paid, gifts to charity, casualty losses and others.

(B) Interest, dividends and foreign trusts and accounts.

(C) Profit or loss from business.

(D) Capital gains and losses, e.g., stock, personal use realty, virtual currency.

(E) Supplemental income and loss, e.g., rental property, sole proprietorship, LLC and S Corp income.

Many other lettered schedules and incentive-specific

forms (e.g., 8283 gifts to charity or 8889 health care savings accounts) and corresponding worksheets may be necessary. All are available from the IRS, most with corresponding product pages and instructions.

In summary, most of the calculations and legal categories for income have not changed despite the administrative rearrangement of this year's 1040. AFSA recommends that members review the IRS's 1040 information webpage "About Form 1040, U.S. Individual Income Tax Return," the 1040 Instructions, Publication 17 and this year's IRS Nationwide Income Tax Forums Online.

New W-4 Withholding Certificate Has No Exemptions Beginning in 2020

Taxpayers usually do not think to revise their W-4 withholdings until April, after they've paid their final 2019 taxes and withheld taxes on their wages based on an old calculation for several months of 2020. Don't wait. Withholding for next year begins Jan. 1, so readers who have not already resubmitted are withholding their taxes filed in April based on an old W-4. AFSA recommends readers revise their W-4s (with the new form) via their Human Resources office or through their employer's online portal (e.g. Employee Express for State Department employees). Promptly doing so will help you avoid overwithholding or playing catch-up due to underwithholding for several months.

Standard Deduction

The standard deduction has gone up slightly this year:

- \$24,400 married filing jointly,
- \$18,350 for heads of household, specifically defined by IRC Section 2(b), and
- \$12,200 for individuals filing separately.

The personal exemption remains \$0 for 2019.

Capital Gains for Sale of Capital Assets Such as Realty, Stocks or Virtual Currency

Short-term capital gains are taxed at the same rate as ordinary income. With a couple of exceptions, long-term capital gains rates vary based on taxable gross income—from 0 percent for those in the lowest tax bracket to 20 percent for those in the highest.

Finally, and closely related, an additional 3.8 percent net investment income tax may apply to some forms of investment income, including some capital gains for taxpayers with modified adjusted gross income above:

- \$250,000 for those married filing jointly,
- \$200,000 head of household,
- \$125,000 unmarried, and
- \$250,000 qualifying widow with a dependent child.

Child and Dependent-Related Incentives

Child Tax Credit

A tax credit of up to \$2,000 (limit of \$1,400 refundable) per year is available for each qualifying child under age 17. It continues to operate as described by last year's Tax Update and is claimed directly on the 1040.

Other Dependent Credit

A separate but related Other Dependent Credit is available, often for those who do not meet the qualifying child requirement. Calculate these first two incentives on the Child Tax Credit and Credit for Other Dependents Worksheet. The worksheet and a flow chart for determining "Who Qualifies as Your Dependent?" are in the 1040 instructions for line 13a. AFSA also recommends IRS Publication 5307, Publication 927, the instructions for Schedule 8812 (additional child tax credit), and IRC Sec. 24 for the Child Tax Credit and Other Dependent Credit.

Child and Dependent Care Tax Credit

Taxpayers with a qualifying dependent may be separately eligible for a credit for part of their child and dependent care expenses. AFSA recommends IRS Tax Topic 602, Form 2441 and instructions, as well as 1040 Schedule 3 and corresponding 1040 instructions. To claim this for care providers who do not have a U.S. taxpayer identification number (either a Social Security number or Employer Identification Number), presumably because you are posted abroad, enter "LAFCP" (Living Abroad Foreign Care Provider) on Form 2441 in the space for the care provider's taxpayer identification number.

For all three incentives related to children and dependents, qualifying child rules can quickly become complex, especially in the case of divorce or separation.

Moving for a New Job & Retiring from Overseas Deductions Not Available Now

The personal costs incurred to move to a new job (IRC Sec. 217(j)) and for moving back to the United States after retiring from overseas are no longer deductible following amendments to the 2017 Tax Cuts and Jobs Act. Only active-duty members of the armed forces should use Form 3903 to calculate and deduct their moving expenses from their military moves. Visit the IRS web page "Moving Expenses to and from the United States," read Publication 521, and contact a professional to discuss future planning opportunities on these issues for 2026—the tax year many provisions of the Tax Cuts and Jobs Act sunset.

Official Relocation Under the Foreign Service Act Is Not Taxed (PCS, R&R, Medevac)

All travel authorized under Section 901 of the Foreign Service Act, which includes permanent change of station, representa-

tional travel, R&R, emergency visitation travel and medevac, is exempt from taxation per IRC Sec. 912. Charleston General Financial Services secured advice from the IRS to this effect, which is consistent with IRS guidance issued in April 2018. None of these reimbursements appears on a W-2 for State Department employees. Non-State Department employees and anyone who doubts they are traveling under the Foreign Service Act should contact a professional to determine what relocation expenses may now be taxable.

Personally Incurred Expenses for Home Leave and R&R

Personal expenses paid by a direct-hire employee while on R&R are not tax deductible. Prior to the 2017 Tax Cuts and Jobs Act, lodging, food and transportation expenses paid by the employee on official home leave were deductible on Schedule A as unreimbursed employee business expenses. The 2017 Tax Cuts and Jobs Act eliminated the tax deduction for most unreimbursed employee business expenses, so these expenses cannot be deducted until 2026 (filed April 2027). The Schedule A line 16 "other itemized deductions" section is not appropriate for deducting these expenses.

Representational & Official Residence Expenses

The IRS published information on ORE and several other topics related to the Foreign Service in the International Taxpayers portion of its website in March, which is not binding on the IRS or the Tax Court. Much of it appears inaccurate (e.g., contrary to that information, Schedule A is not appropriate for deducting ORE).

Alimony for Divorces, Settlements & Modifications Beginning in 2019

For 2019 tax returns, alimony paid pursuant to agreements and orders entered before Jan. 1 is deductible by the payor and taxed as income to the payee, which is how alimony has traditionally been treated. Alimony payments paid pursuant to agreements and orders entered into or modified Jan. 1 or after, however, are not deductible by the payor or taxed as income to the payee. Payors should read Form 1040 Schedule 1, the 1040 Instructions, and Tax Topic 452. Note that the Tax

Circular 230 Notice: Pursuant to U.S. Treasury Department Regulations, all tax advice herein is neither intended nor written to be used, and may not be used, for the purposes of avoiding tax-related penalties under the Internal Revenue Code or promoting, marketing or recommending advice on any tax-related matters.

Cuts and Jobs Act of 2017 repealed IRC Sec. 71 and 26 CFR 1.71-1, versions of which remain online from various sources.

Foreign Earned Income Exclusion

Taxpayers living and working overseas may be eligible for the FEIE. In 2019 the first \$105,900 earned overseas as a (nongovernment) employee or self-employed person may be exempt from federal income taxes but not from self-employment taxes.

To receive this exclusion the taxpayer must:

(1) Establish a tax home in a foreign country, which is the general area of the taxpayer's "main place of business, employment or post of duty" (i.e., where the taxpayer is "permanently or indefinitely engaged to work as an employee or self-employed individual"); and

(2) Either (a) meet the "bona-fide residence" test, which requires that the taxpayer be a bona-fide resident of a foreign country for an uninterrupted period that includes an entire tax year, or (b) meet the "physical presence" test, which requires the taxpayer to be present in a foreign country for at least 330 full (midnight-to-midnight) days during any 12-month period (the 12-month period may be different from the tax year). Travel days to and from the United States do not count toward the total for days inside the foreign country (they are considered U.S. days). Members have successfully used the physical presence test when bona-fide residence cannot be established. Those who rely on physical presence should contemporaneously document travel days and retain copies of visas and tickets to substantiate their calculation.

AFSA understands that IRS auditors have denied the FEIE for Foreign Service spouses and dependents for failing to meet the bona-fide residence or tax home elements of this test.

The U.S. Tax Court has explained that the congressional purpose of the FEIE was to offset duplicative costs of maintaining distinct U.S. and foreign households. Increasing ties to the foreign country by personally paying for a foreign household, paying local taxes, waiving diplomatic immunity for matters related to your job, paying for vacation travel back to the United States, becoming a resident of the foreign country and working in the foreign country long-term are other factors the federal courts have cumulatively recognized as establishing a foreign tax home.

The U.S. Tax Court took up five FEIE cases in 2019, three involving members of the military and one, a civilian pilot. The best further reading in this regard is *Haskins v. IRS*, 2019 TC Memo 87 (July 11, 2019) because the intricate fact pattern is provided in full and the court includes a complete FEIE analysis for foreign presence and foreign tax home. Unfortunately, since Ms. Haskins' abode was stateside even though she was

abroad with a foreign tax home, hers is not a model case for FEIE planning or dispute resolution before the IRS (of which the Tax Court is part). These cases (e.g., *Bellwood v. IRS*, 2019 TC Memo 135, pp. 14-21 [Oct. 7, 2019]) are available via Google Scholar and the U.S. Tax Court website by searching "foreign income" and "exclusion" or the case citations.

Regarding calculating income for other benefits, taxpayers must add the amount excluded under the FEIE back to AGI to figure what their tax liability would be prior to calculating what they owe with the FEIE exclusion. For example, a Foreign Service employee earns \$80,000 with a teacher spouse earning \$30,000. All else being equal, tax liability on \$110,000 gross income is \$15,917; tax on \$30,000 foreign income is \$3,212; and net tax liability is \$15,917 minus \$3,212, yielding \$12,705 due. Many other tax credits and deductions (e.g., Traditional IRA and Roth IRA contributions) also work this way.

As a final note, if all the taxpayer or spouse's income is excluded under the FEIE in a tax year, then the taxpayer will not qualify for the Child and Dependent Care credit that year.

Foreign Accounts and Asset Reporting

When a U.S. person (defined as a citizen, resident or green card holder) has offshore income, assets, accounts and/or entities, U.S. income tax and reporting obligations can become a minefield of potential penalties. Many additional reporting forms apply to such taxpayers, but only a handful of accountants and tax attorneys have the expertise to identify which forms need to be completed and to complete them correctly. The penalties for failing to file or making mistakes on such forms can be draconian.

U.S. persons are taxed on their worldwide income. Members of the Foreign Service must report a wide variety of offshore assets and activities on specific U.S. reporting forms, even if such activities occur abroad. For example, U.S. persons with ownership or signature authority over a foreign bank account of any value must denote this interest in Part III of Schedule B of Form 1040. This often-overlooked section is not only part of the signed 1040 (under penalty of perjury), but it also lets the IRS know whether it can expect a Foreign Bank and Financial Accounts Report (FBAR) from that taxpayer. A misstatement on Schedule B can be used by the IRS against the taxpayer when assessing reporting penalties.

The separately filed FBAR (via the BSA e-filing system) may also be essential—penalties associated with failing to file or filing an erroneous FBAR are enormous. This form is required from taxpayers with non-U.S. bank accounts and other offshore assets (including some life insurance policies and pensions) that have an aggregate value of more than \$10,000 at any time during the year. Failing to report an account on an FBAR can lead to penalties ranging from



\$12,921 per account, per year (for an accidental, non-willful error) up to the greater of \$129,210 or 50 percent of each account balance, per account, per year (for a more serious offense, such as one coupled with a misstatement on Schedule B or where an investment account was reported but a pension account missed). Willful failures and errors can result in additional penalties and even jail time. These and other penalties for failing to file foreign asset reporting forms can be greater than the value of the assets for which they are filed.

Taxpayers with interests in certain foreign financial assets must also file Form 8938 if the total value of such assets exceeds the applicable statutory reporting threshold (i.e., for unmarried persons living in the United States, more than \$50,000 on the last day of the tax year or more than \$75,000 at any time during the tax year). Errors relating to this form may result in penalties in excess of \$10,000. In addition, the statute of limitations for assessment on a foreign asset reporting form remains open for three years after the date on which the form is ultimately filed, not from when it was due.

Additional tax forms must be filed by taxpayers who:

- (1) have interests in or engage in transactions with offshore entities, trusts and pensions;
- (2) have investments in foreign mutual funds;
- (3) receive substantial gifts from non-U.S. persons; and
- (4) wish to claim the benefit of a treaty-based return position.

Many of these reporting forms must be filed even if they have no impact on tax liability.

Taxpayers with foreign assets may want to work with a qualified tax professional who is experienced in the realm of foreign asset reporting to avoid errors. Provide the tax preparer with a complete set of statements for each asset for every year, and save every bank, life insurance and pension statement for at least seven years.

Qualified Business Income Deduction

To encourage small businesses and start-ups back home, the Tax Cuts and Jobs Act of 2017 created a deduction for up to 20 percent of qualified business income and 20 percent of qualified real estate investment trusts income. The QBI portion only includes expenses connected to the business that are used to conduct the business, and that were material to generating revenue. REIT includes payments, like dividends, from a real estate investment trust that are not capital gain dividends or qualified dividend income. Calculate this deduction on Form 8995, for which the associated instructions are essential.

Also of note are pass-through entities such as S Corps, LLCs and sole proprietorships that can claim this deduction; but pay attention to pass-through requirements (e.g., via K-1s)

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and do not double dip. Business income earned outside the United States is not QBI—the income must be earned in a U.S. trade or business. Some trusts and estates may be eligible, as well; but income earned as an employee of a C Corporation does not qualify. For specified trades and businesses, which are specifically identified by code and include many services businesses such as law firms, accounting firms and consulting businesses, the QBID is prohibited for taxpayers whose taxable income (before the deduction and excluding capital gain) is \$160,700 for individual filers or \$321,400 married filing jointly. Other complicated limits and requirements apply to nonspecified trades or businesses.

Adjustments and Basis

As of early December 2019, the calculation of basis in assets such as a home, increases for investments and decreases for depreciation or damage, has not changed. Please refer to Tax Topic 703, Publication 551, 1040 Schedule D with instructions, IRC Sections 1011, 1012 and 1014 through 1017, and associated tax regulations beginning at 26 CFR Sec. 1.1012-1. Recent iterations of the annual tax seminar offered by Christine Elsea-Mandojana through the Foreign Service Institute have illustrated how mistakes in tracking basis can result in incorrectly reported gain or loss from the sale of a principal residence.

Federal Estate & Gift Taxes

In 2019 the first \$11.4 million of a decedent's aggregate estate (up to \$22.8 million for a surviving spouse with a portability election on Form 1041) was exempt from the federal estate tax. That amount will increase to \$11.58 million for decedents who pass away in 2020. The same amounts would apply to (and are reduced by) lifetime gift-giving over the annual tax-free gift exclusion. The limit on the exclusion for gifts given in 2020 is \$15,000 (\$30,000 for gifts split by married couples on Form 709).

Retirement Savings in TSP, 401(k)s and IRAs

The standard contribution and catchup contribution limits for all three methods of retirement savings increase by \$500 in 2020. For 401(k)s and the Thrift Savings Plans, individual participant may contribute \$19,500 during the year. Those 50 and older may make 401(k) and TSP catchup contributions of \$6,500. Finally, the IRA contribution limits increase to \$6,000 for those under 50 and \$7,000 for those 50 and over. The 2019 tax year deadline is April 15, 2020 for contributing to a Roth IRA or traditional IRA (at the \$5,500/\$6,500 limits). Deposits to a 401(k) may only be made via payroll deductions, the last of which is possible Dec. 31, 2019. The 2019 ROTH and IRA contribution limits are \$6,000 for under age 50 and \$7,000 for age 50 and over.

Itemized Deductions Still Allowed via Schedule A

Although the Tax Cuts and Jobs Act of 2017 removed the overall cap for itemized deductions, it suspended miscellaneous itemized deductions, to the extent they exceed two percent of AGI, through 2025. Schedule A and the instructions are the best guide for what remains deductible for itemizers. In other words, many Schedule A deductions remain available but only those subject to the two percent floor, like home leave as an employee expense, were eliminated.

Medical and Dental: Deduct for Expenses Over 10 Percent of AGI

The deduction for unreimbursed medical and dental expenses is possible only to the extent qualifying expenses exceed 10 percent of a taxpayer's AGI (changed from 7.5 percent in 2018). AFSA recommends that members claiming these deductions read IRS Publication 502, Tax Topic 502 and IRC Section 213. Note that the referenced IRS publications continue to list 7.5 percent of AGI as the deduction threshold, which only applies for 2017 and 2018.

Taxes, including State & Local Property

The IRS recently adopted new regulations relating to tax credits that affect deductions for charitable contributions. The new regulations require a reduction in a taxpayer's federal charitable contribution deduction (including estates and trusts) by an amount equal to all state and local tax credits the taxpayer expects on their return.

An example offered by the IRS illustrates the effect of the new regulation well: "If a state grants a 70 percent state tax credit pursuant to a state tax credit program, and an itemizing taxpayer contributes \$1,000 pursuant to that program, the taxpayer receives a \$700 state tax credit. A taxpayer who itemizes deductions must reduce the \$1,000 federal charitable contribution deduction by the \$700 state tax credit, leaving a federal charitable contribution deduction of \$300."

Refer to IRS Notice 2019-12, Treasury Decision 98-64, 26 CFR Sec. 1-170A-1(h)(3), Tax Topic 503 and IRC Sections 164, 170(c) for more on these provisions. This new regulation prevents taxpayers from sidestepping the \$10,000 cap on the deduction for state and local taxes by instead contributing the excess to the state or local jurisdiction and claiming it as a charitable contribution.

Selling a Principal Residence, Military Families Tax Relief Act Unchanged

A taxpayer may still exclude up to \$250,000 (\$500,000 if married filing jointly) of long-term capital gain (but not the repayment of mandatory rental depreciation) from the sale of a principal residence. To qualify for the full exclusion amount,

the taxpayer: (1) must have owned the home and lived there for at least two of the last five years, beginning on the date first occupied, before the date of the sale (but see Military Families Relief Act, below); (2) cannot have acquired the home in a 1031 exchange within the five years before the date of the sale; and (3) cannot have claimed this exclusion during the two years before the date of the sale.

An exclusion of gain for a fraction of these upper limits may be possible if one or more of the above requirements are not met. Taxpayers who sell their principal residence for a profit of more than \$250,000 (\$500,000 for married filing jointly) will owe capital gains tax on the excess. AFSA recommends Topic 701, Publication 523, IRC Sec. 121 and related regulations.

Military Families Tax Relief Act of 2003

According to the Military Families Tax Relief Act of 2003, the five-year period described above, beginning on the date you first occupy your residence, may be suspended for members of the Foreign Service for any 10-year period during which the taxpayer has been away from the area on a Foreign Service assignment, up to a maximum of 15 total years.

Failure to meet all of the requirements for this tax benefit (points (1) through (3) in the Selling a Principal Residence section above) does not necessarily disqualify the taxpayer from claiming the exclusion. However, the services of a tax professional will probably be necessary if one of these requirements is not met. In addition to the recommended reading from the previous section, AFSA recommends reviewing IRC Sec. 121(d)(9) and 26 CFR Sec. 1.121-5.

Business Use of Home

Although most Foreign Service families find themselves in government-funded housing overseas much of the time, some may own property in the United States that they both occupy for personal purposes and use to operate a private business on the side. To qualify for a deduction for business-related expenses for a portion of a residence used for a business, a taxpayer must use a portion of their home exclusively and regularly as a principal place of business (and file a Schedule C), as a rental property or for a daycare facility.

A taxpayer who meets that threshold must then either calculate the actual expenses of the home office—e.g., cost of a business phone line and part of state and local property taxes, utilities, mortgage interest and depreciation—or use the IRS' simplified method based on a flat rate for the square footage used for business (up to a maximum of 300 square feet). Also note that expenses incurred for the entire home, such as property taxes, must be prorated based on the percentage of the home used exclusively for the business if you choose the regular (not simplified) calculation. For more information,

contact a professional and read IRS Topic 509, Publication 587, the instructions for Form 8829, 1040 Schedule C, and IRC Sections 162, 212 and associated regulations.

Depreciating Real Property Used to Produce Income

The cost of income-producing capital property, such as residential and nonresidential rental property, is deductible over the IRS-defined recovery period for the structure or property. The deductible portion of income-producing property is referred to as depreciation. To calculate annual depreciation, a taxpayer must know the property's cost basis, adjustments to basis (tracked throughout the life of the property), the date the property was placed in service as income-producing property, and the IRS-required depreciation method and convention.

The IRS requires a taxpayer to depreciate buildings, certain land improvements and other types of capital assets—all annually. The IRS prohibits a taxpayer, however, from depreciating land, including the land on which a depreciable asset sits, such as a residential rental property. So land values must be accounted for separately. Property used for personal purposes may not be depreciated and claimed for tax purposes.

Taxpayers who believe they have sufficiently documented their property to begin using it for income-producing purposes should contact a tax professional to properly set up a business, calculate business expenses (including depreciation), account for income derived from the property and file correct tax forms on time each year. AFSA recommends also reading Tax Topics 703 (basis), 704 (depreciation) and 414 (rental property); the Schedule E and 1040 instructions; IRC Sections 167 (depreciation), 1012 (cost basis), 1011 (adjusted basis) and 1016 (adjustments to basis); associated basis and depreciation regulations; and Publications 527 and 946. Professional assistance may be necessary for a possible IRC Section 1031 Exchange of like-kind, real property located in the United States, which is held for the production of income (i.e., not a personal residence, but possibly domestic rental property).

Charitable Contributions

Up to 60 percent of a taxpayer's income base can be deducted for charitable contributions. Common issues include contributing to a qualified organization, properly documenting contributions of \$250 or more, accounting for benefits received in return for donations and calculating the income base. Note that the Tax Cuts and Jobs Act of 2017 significantly restricts deductions for contributions to colleges and universities in return for the right to buy tickets to sporting events. Refer also to the new IRS regulations linking this

tax incentive with the capped deduction for state and local taxes above. AFSA recommends Tax Topic 506, Publication 526, the Schedule A and 1040 instructions, and IRC Section 170 for more information.

Casualty and Theft Losses

The value of property lost by taxpayers to theft (for business property only) or natural disaster of over \$500 is deductible under IRC Section 165. The requirement that such losses exceed 10 percent of AGI is suspended from 2018 through 2025. For individual taxpayer personal use property only, losses must be attributable to federally declared disasters defined by Sec. 165(i). Note that amounts claimed for deductions must be reduced by amounts received for salvage or insurance benefits. AFSA recommends Tax Topic 515, Publication 547 and IRC Sec. 165.

Health Care Savings Account (HSA)

In 2020 State Department employees may contribute up to \$2,750 to a Health Care Savings Account. Each qualifying employee may do so, for a combined total limit of \$5,500. Additional contributions may be made to Limited Expense Health Care Flexible Spending Accounts, but only eligible dental and vision expenses may be reimbursed therefrom. The contributions are pre-tax, expenditures on qualifying medical expenses are not taxed and unused amounts can be rolled over from year to year with a proper election. AFSA recommends Publication 969, the Form 8889 instructions and the basics from the FSA Feds website.

Conclusion

Despite some administrative reorganization with the 1040 and numbered schedules this year, the tax code remained stable in 2019. Those administrative differences are, however, reason to file a revised W-4 with your employer as soon as possible. Other than some adjustments to dates and for inflation, the only probable variables for this year's tax return are changes to a source of income or an asset.

While AFSA encourages its members to continue their tax education by reading the Internal Revenue Code, IRS regulations and referenced IRS publications, there is no substitute for professional help for specific questions, particularly for thorny international income and assets issues. For now, enjoy the relative calm. The upcoming general election may shake up the tax code next year. ■

2019 STATE TAX PROVISIONS

Liability

Every employer, including the State Department and other foreign affairs agencies, is required to withhold state taxes for the location in which the employee either lives or works. Employees serving overseas must maintain a state of domicile in the United States where they may be liable for income tax; the consequent tax liability that employees face will vary greatly from state to state.

Further, the many laws on taxability of Foreign Service pensions and annuities also vary by state. This section briefly covers both those situations. In addition, see separate box on state tax withholding for State employees. We also encourage you to read the CGFS Knowledge Base article on the Tax Guide page of the AFSA website at www.afsa.org/afsa-tax-guide.

Domicile and Residency

Many criteria are 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 because of overseas service. In such cases, the states will determine the individual's income tax status based on other factors, including where the individual has family ties, has been filing resident tax returns, is registered to vote, has a driver's license, owns property, or 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 the state, including during assignments abroad, unless the state of residence does not require it.

Members are encouraged to review the Overseas Briefing Center's guide to Residence and Domicile, available on AFSA's website at www.afsa.org/domicile.

Domestic Employees in the D.C. Area

Foreign Service employees residing in the metropolitan Washington, D.C., area are generally required to pay income tax to the District of Columbia, Maryland or Virginia, in addition to paying tax to the state of their domicile.

Virginia requires tax returns from most temporary residents,

as well. Most states allow a credit, however, so that the taxpayer pays the higher tax rate of the two states, with each state receiving a share.

We recommend that you maintain ties with your state of domicile—by continuing, for instance, to also file tax returns in that state if appropriate—so that when you leave the D.C. area for another overseas assignment, you can demonstrate to the District of Columbia, Virginia or Maryland your affiliation to your home state.

Also, if possible, avoid using the D.C. or Dulles, Va., pouch ZIP code as your return address on your federal return. In some cases, the D.C. and Virginia tax authorities have sought back taxes from those who have used this address.

States That Have No Income Tax

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

States That Do Not Tax Nonresident Domiciliaries

There are 10 states that, under certain conditions, do not tax income earned while the taxpayer is outside the state: California, Connecticut, Idaho, Minnesota, Missouri, New Jersey, New York, Oregon, Pennsylvania (but see entry for Pennsylvania below) and West Virginia.

The requirements for all states except California, Idaho and Oregon are that the individual should not have a permanent “place of abode” in the state, should have a permanent “place of abode” outside the state, and should 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.

All 10 states require the filing of nonresident returns for all income earned from in-state sources. Foreign Service employees should also keep in mind that states could challenge the status of overseas government housing in the future.

The “State Overviews” section, below, gives brief state-by-state information on tax liability, with addresses provided to obtain further information or tax forms. Tax rates are also provided where possible.

As always, members are advised to double-check with their state’s tax authorities. While AFSA makes every attempt to share the most up-to-date information, readers with specific questions should consult a tax expert in their respective state. A website address for each state’s tax authority is in the state-by-state guide, as well as an email address or link where available. Some states do not offer email customer service.

We also recommend the Tax Foundation website at www.taxfoundation.org, which offers a great deal of useful information, including a table showing 2019 tax rates for all states at <https://taxfoundation.org/state-individual-income-tax-rates-brackets-2019/>. ■

TAX WITHHOLDING WHEN ASSIGNED DOMESTICALLY

The State Department withholds an employee’s state taxes according to his or her “regular place of duty” when assigned domestically—for details, see “New Procedures for Withholding and Reporting Employees’ State and District of Columbia Income Taxes,” Announcement No. 22394 (Nov. 4, 2014; available via the intranet). This reflects some jurisdictions’ imposition of income taxes on nonresidents who derive income within their boundaries despite residence or domicile elsewhere.

Members residing or domiciled in a jurisdiction other than the one in which they earn income may need state taxes to be withheld for their residence and domicile jurisdictions. If you reside or are domiciled in a jurisdiction other than that of your regular place of duty, you may secure an exemption from this withholding method by satisfying the requirements detailed by CGFS Knowledgebase (available via the intranet at <http://kb.gfs.state.gov/>) Issue 39479.

Note that the Bureau of the Comptroller and Global Financial Services does not adjudicate state income tax elections when you are serving overseas, since in those circumstances, it is the employee’s responsibility to accurately designate a state for which income taxes will be withheld. On the employee’s return to a domestic assignment, however, CGFS will evaluate the employee’s state tax withholding election based on his or her new official domestic duty station pursuant to Announcement No. 22394.

Finally, this determination does not mean that you must relinquish your state of domicile if it is different from your official duty station. “Domicile” and “residence” are different from “regular place of duty.” As long as you maintain your ties to your home state, you will be able to change your withholding back, if you wish, to your home state when you go overseas. See the Overseas Briefing Center’s guide to Residence and Domicile, available on AFSA’s website at www.afsa.org/domicile. ■

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 percent on taxable income over \$500 for single taxpayers and \$1,000 for married filing jointly, to 5 percent over \$3,000 for single taxpayers and \$6,000 for married filing jointly.

Write: Alabama Department of Revenue, 50 N. Ripley St., Montgomery AL 36104.

Phone: (334) 242-1170

Website: <https://revenue.alabama.gov>

Email: Link at bottom of main webpage.

ALASKA

Alaska does not tax individual income or intangible or personal property. It has no state sales and use, franchise or fiduciary tax. Some municipalities levy sales, property and use taxes, however.

Write: Tax Division, Alaska Department of Revenue, P.O. Box 110420, Juneau AK 99811-0420.

Phone: (907) 465-2320

Website: 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 percent to a maximum of 4.54 percent of taxable income over \$331,346 married filing jointly or \$165,674 for single filers.

Write: Arizona Department of Revenue, Customer Care, P.O. Box 29086, Phoenix AZ 85038-9086.

Phone: (602) 255-3381

Website: www.azdor.gov

Email: taxpayerassistance@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 2.4 percent to a maximum of 6.9 percent of net taxable income over \$84,601.

Write: Department of Finance and Administration, Income Tax Section, P.O. Box 3628, Little Rock AR 72203-3628.

Phone: (501) 682-1100

Website: www.arkansas.gov/dfa

Email: individual.income@dfa.arkansas.gov

CALIFORNIA

Foreign Service employees domiciled in California must establish nonresidency to avoid liability for California taxes (see Franchise Tax Board Publication 1031). However, a "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 nonresident. This applies to most Foreign Service 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 2018 (2019 rates not available at press time) ranged in eight brackets from 1 percent of taxable income under \$8,544 for singles and \$17,088 for joint filers, to a maximum of 12.3 percent on taxable income over \$572,980 for singles and \$1,145,960 for joint filers. Nonresident domiciliaries are advised to file on Form 540NR.

Write: Personal Income Taxes, Franchise Tax Board, P.O. Box 942840, Sacramento CA 94240-0040.

Phone: (800) 852-5711 (inside the U.S.); (916) 845-6500 (outside the U.S.)

Website: www.ftb.ca.gov

Email: Link through the website's Contact Us tab.

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, P.O. Box 17087, Denver CO 80217-0087.

Phone: (303) 238-7378

Website: www.colorado.gov/revenue

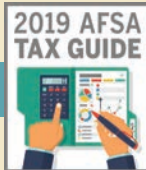
Email: DOR_TaxpayerService@state.co.us

CONNECTICUT

Connecticut domiciliaries may qualify for nonresident 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 per-



manent place of abode in the state at which the domiciliary's spouse or minor children are present for more than 90 days.

Connecticut's tax rate for married filing jointly rises from 3 percent on the first \$20,000 in six steps to 6.9 percent of the excess over \$500,000, and 6.99 percent over \$1,000,000. For singles, it is 3 percent on the first \$10,000, rising in six steps to 6.9 percent of the excess over \$250,000 and 6.99 percent over \$500,000.

Write: Department of Revenue Services, 450 Columbus Blvd., Suite 1, Hartford CT 06103.

Phone: (860) 297-5962

Website: www.ct.gov/drs

Email: Link through the website's Contact Us tab.

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 rises in six steps from 2.2 percent of taxable income under \$5,000 to 6.6 percent of 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

Website: www.revenue.delaware.gov

Email: personaltax@state.de.us

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; 6 percent between \$10,000 and \$40,000; 6.5 percent between \$40,000 and \$60,000; 8.5 percent between \$60,000 and \$350,000; 8.75 percent between \$350,000 and \$1,000,000; and 8.95 percent over \$1,000,000.

Write: Office of Tax and Revenue, Customer Service Center, 1101 4th St. SW, Suite 270 West, Washington DC 20024.

Phone: (202) 727-4829

Website: www.otr.cfo.dc.gov/

Email: taxhelp@dc.gov

FLORIDA

Florida does not impose personal income, inheritance, gift or intangible personal property taxes. Property tax (homestead) exemptions are available only if you own and permanently reside on the property. Sales and use tax is 6 percent. There are additional county sales taxes that could make the com-

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bined rate as high as 9.5 percent.

Write: Taxpayer Services, Florida Department of Revenue, 5050 W. Tennessee St., Bldg. L, Tallahassee FL 32399-0100.

Phone: (850) 488-6800

Website: floridarevenue.com/taxes

Email: DOR@floridarevenue.com

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 in six steps to a maximum of 5.75 percent of taxable income over \$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: (877) 423-6711, Option 2, or contact the Georgia Tax Center (login required)

Website: dor.georgia.gov/taxes

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 tax year 2019, Hawaii's tax rate rises in 12 steps from 1.4 percent on taxable income below \$2,400 for single filers and \$4,800 for joint filers, to a maximum of 11.00 percent for taxable income above \$200,000 for single filers and \$400,000 for joint filers.

Write: Oahu District Office, Taxpayer Services Branch, P.O. Box 259, Honolulu HI 96809-0259.

Phone: (800) 222-3229 or (808) 587-4242

Website: tax.hawaii.gov

Email: Taxpayer.Services@hawaii.gov

IDAHO

Individuals domiciled in Idaho for an entire tax year are considered residents and are subject to tax on their entire income. You are, however, considered a nonresident if: 1) you are an Idaho resident who lived outside 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).

In 2019 Idaho's tax rate rises in six steps from a minimum of 1.125 percent to a maximum of 6.925 percent on the amount of Idaho taxable income over \$11,554 for singles and \$23,108 for married filers. A nonresident 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: (800) 972-7660 or (208) 334-7660

Website: www.tax.idaho.gov

Email: taxrep@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. Effective for income received after June 30, 2017, Illinois Public Act 100-0022 increased the Illinois income tax rate for individuals from a flat rate of 3.75 percent to a flat rate of 4.95 percent of net income.

Write: Illinois Department of Revenue, P.O. Box 19014, Springfield IL 62794-9014.

Phone: (800) 732-8866 or (217) 782-3336

Website: www.revenue.state.il.us

Email: Link through the website's Contact Us page under "Taxpayer Answer Center."

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 is a flat 3.23 percent of Federal Adjusted Gross Income. Several counties also charge a county income tax.

Write: Indiana Department of Revenue, Individual Income Tax, P.O. Box 40, Indianapolis IN 46206-0040.

Phone: (317) 232-2240

Website: www.in.gov/dor

Email: Link through the website's Contact Us tab.

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 2019 tax rate rises in eight steps from 0.33 percent to a maximum 8.53 percent of taxable income over \$73,710, for both single and joint filers.

Write: Taxpayer Services, Iowa Department of Revenue, P.O. Box 10457, Des Moines IA 50306-0457.

Phone: (515) 281-3114 or (800) 367-3388

Website: tax.iowa.gov

Email: Use form on the website's Contact Us page.

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. In 2019 the tax rate is 5.25 percent on Kansas taxable income under \$15,000 for single filers and under \$30,000 for joint filers, rising to 5.7 percent on income over \$30,000 for single filers and \$60,000 for joint filers.

Write: Kansas Taxpayer Assistance Center, Scott State Office Building, 120 SE 10th St., Topeka KS 66612-1103.
Phone: (785) 368-8222
Website: www.ksrevenue.org
Email: kdor_tac@ks.gov

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 is a flat 5 percent.

Write: Kentucky Department of Revenue, 501 High St., Frankfort KY 40601.
Phone: (502) 564-4581
Website: www.revenue.ky.gov
Email: Link through the website's Contact Us tab.

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 is 2 percent for the first \$12,500 for single filers or \$25,000 for joint filers, 4 percent over \$12,500 for singles and over \$25,000 for joint filers, and 6 percent for over \$50,000 for single filers or \$100,000 for joint filers.

Write: Taxpayer Services Division, Individual Income Tax Section, Louisiana Department of Revenue, P.O. Box 201, Baton Rouge LA 70821-0201.
Phone: (225) 219-0102
Website: www.revenue.louisiana.gov
Email: Link through the website's Contact Us page under "Contact LDF Online."

MAINE

Individuals domiciled in Maine are considered residents and are subject to tax on their entire income. Since Jan. 1, 2007, however, there have been "safe harbor" provisions. Under the General Safe Harbor provision, Maine domiciliaries are treated as nonresidents 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 also treated as nonresidents 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 in 2019 is 5.8 percent on Maine taxable income below \$21,850 for singles and \$43,700 for joint filers, 6.75 percent up to \$51,700 for singles and \$103,400 for married filing jointly, and 7.15 percent over those amounts.

Write: Maine Revenue Services, Income Tax Assistance, P.O. Box 9107, Augusta ME 04332-9107.
Phone: (207) 626-8475
Website: www.maine.gov/revenue
Email: income.tax@maine.gov

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. Maryland's tax rate is 4.75 percent of taxable income over \$3,000 up to \$100,000 if filing singly and \$150,000 if filing jointly. It then rises in four steps to 5.75 percent of taxable income over \$250,000 for singles and over \$300,000 for married filers. 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 1.75 percent in Worcester County (and for nonresidents) to 3.2 percent in Baltimore City and in Montgomery, Prince George's, Queen Anne's, Wicomico and Howard counties (see website for details on all counties).

Write: Comptroller of Maryland, Revenue Administration Center, Taxpayer Service Section, 110 Carroll St., Annapolis MD 21411-0001.
Phone: (800) 638-2937 or (410) 260-7980
Website: www.marylandtaxes.com
Email: taxhelp@comp.state.md.us

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 5.05 percent for 2019. Some income (e.g., short-term capital gains) remains taxed at 12 percent.

Write: Massachusetts Department of Revenue, Taxpayer Services Division, P.O. Box 7010, Boston MA 02204.

Phone: (617) 887-6367
 Website: www.mass.gov/dor
 Email: Link through the website's Contact Us tab.

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 is 4.25 percent. Some Michigan cities impose an additional income tax of 1 or 2 percent. Detroit imposes an additional 2.4 percent income tax.

Write: Michigan Department of Treasury, Lansing MI 48922.
 Phone: (517) 636-4486
 Website: www.michigan.gov/treasury
 Email: treasIndTax@michigan.gov

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 in 2019 is 5.35 percent on taxable income up to \$26,520 for singles or \$38,770 for married joint filers, rising in three steps to a maximum of 9.85 percent on taxable income over \$163,890 for single filers or \$273,150 for married filing jointly.

Write: Minnesota Department of Revenue, 600 North Robert St., St. Paul MN 55146-5510.
 Phone: (800) 652-9094 or (651) 296-3781
 Website: www.revenue.state.mn.us
 Email: individual.incometax@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 (first \$1,000 exempt), 4 percent on the next \$5,000 and 5 percent on taxable income over \$10,000 for all taxpayers, whether filing singly or jointly.

Write: Department of Revenue, P.O. Box 1033, Jackson MS 39215-1033.
 Phone: (601) 923-7700
 Website: www.dor.ms.gov
 Email: Link through the website's Contact Us tab.

MISSOURI

An individual domiciled in Missouri is considered a nonresident 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 \$8,424 of taxable income. Any

taxable income over \$8,424 is taxed at a rate of 5.4 percent.

Write: Individual Income Tax, P.O. Box 2200, Jefferson City MO 65105-2200.
 Phone: (573) 751-3505
 Website: dor.mo.gov/contact
 Email: income@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 2019 rises in six steps from 1 percent of taxable income under \$3,000, to a maximum of 6.9 percent of taxable income over \$18,400. See the website for various deductions and exemptions.

Write: Montana Department of Revenue, P.O. Box 5805, Helena MT 59604-5805.
 Phone: (866) 859-2254 or (406) 444-6900
 Website: mtrevenue.gov
 Email: Link through the website's Contact Us tab.

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. For 2019, the individual income tax rates range in four steps from a minimum of 2.46 percent to a maximum of 6.84 percent of the excess over \$31,780 for singles and \$63,550 for joint filers.

Write: Department of Revenue, 301 Centennial Mall South, P.O. Box 94818, Lincoln NE 68509-4818.
 Phone: (402) 471-5729
 Website: www.revenue.state.ne.us
 Email: Link through the website's Contact Us tab.

NEVADA

Nevada does not tax personal income. Sales and use tax varies from 6.85 percent to 8.1 percent depending on local jurisdiction. Additional ad valorem personal and real property taxes are also levied.

Write: Nevada Department of Taxation, 1550 College Pkwy., Suite 115, Carson City NV 89706.
 Phone: (866) 962-3707 or (775) 684-2000
 Website: 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 and \$4,800 annually for joint filers, and for the 2019 tax year, a 7.9 percent tax on business profits, including sale of rental property. This percentage

drops to 7.7 for tax years 2020 and 2021. There is no inheritance tax. Applicable taxes apply to part-year residents.

Write: Taxpayer Services Division, P.O. Box 637, Concord NH 03302-0637.

Phone: (603) 230-5000

Website: www.revenue.nh.gov

NEW JERSEY

A New Jersey domiciliary is considered a nonresident 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 nonresident has New Jersey-source income), but it is recommended 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, in three steps to 6.37 percent between \$75,000 and \$500,000, and a maximum of 8.97 percent on taxable gross income over \$500,000 for both single and joint filers. There is also a top rate of 10.75 percent for income over \$5,000,000.

Write: New Jersey Division of Taxation, Technical Services Branch, P.O. Box 281, Trenton NJ 08695-0281.

Phone: (609) 292-6400

Website: www.state.nj.us/treasury/taxation

Email: Link through the website's Contact Us tab.

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. Rates rise in four steps from a minimum of 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, 1100 South St. Francis Dr., Santa Fe NM 87504.

Phone: (505) 827-0700

Website: www.tax.newmexico.gov

Email: Link through the website's Email Us tab.

NEW YORK

There is no tax liability for out-of-state income if you have no permanent residence in New York, have a permanent residence elsewhere and are not present in the state more than 30 days during the tax year—or you were in a foreign country for at least 450 days during any period of 548 consecutive days, and you, your spouse and minor children spent 90 days

or less in New York State during this 548-day period. Filing a return is not required, but it is recommended to preserve domicile status.

The tax rate for 2019 rises in six steps from a minimum of 4.5 percent to 6.21 percent of taxable income over \$21,400 for single filers and \$43,000 for married filing jointly; 6.49 percent on taxable income over \$80,650 for single filers and \$161,550 for joint filers; 6.85 percent on taxable income over \$215,400 for single filers or \$323,200 for joint filers; and 8.82 percent over \$1,077,550 for single filers and over \$2,155,350 for joint filers. In New York City, the maximum rate is 3.876 percent over \$90,000 for joint filers and over \$50,000 for single filers. Filing is required on Form IT-203 for revenue derived from New York sources.

Foreign Service employees assigned to USUN for a normal tour of duty are considered residents in New York state for tax purposes. See TSB-M-09(2)I of Jan. 16, 2009, at http://www.tax.ny.gov/pdf/memos/income/m09_2i.pdf.

Write: New York State Department of Taxation and Finance, Personal Income Tax Information, W.A. Harriman Campus, Albany NY 12227.

Phone: (518) 457-5181

Website: www.tax.ny.gov

Email: Link through the website's Answer Center tab.

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. North Carolina's flat tax rate is 5.25 percent for 2019. Residents must also report and pay a "use tax" on purchases made outside the state for use in North Carolina.

Write: North Carolina Department of Revenue, P.O. Box 25000, Raleigh NC 27640-0640.

Phone: (877) 252-3052 or (919) 707-0880

Website: www.dornc.com

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 the 2019 tax year, the tax rate ranges in four steps from 1.1 percent on North Dakota taxable income up to \$39,450 for singles and \$65,900 for joint filers, to a maximum of 2.9 percent on taxable income over \$433,200 for singles and joint filers.

Write: Office of State Tax Commissioner, State Capitol, 600 E. Boulevard Ave., Dept. 127, Bismarck ND 58505-0599.

Phone: (701) 328-1247

Website: www.nd.gov/tax

Email: individualtax@nd.gov

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. Ohio's 2019 tax rate starts at a minimum of 1.98 percent on taxable income over \$10,850, rising in six steps to a maximum of 4.997 percent on taxable income over \$217,400 for single and joint filers. Ohio also charges a school district income tax of between 0.5 and 2 percent, depending on jurisdiction.

Write: Ohio Department of Taxation, Taxpayer Services Center, P.O. Box 530, Columbus OH 43216-0530.

Phone: (800) 282-1780 or (614) 387-0224

Website: www.tax.ohio.gov

Email: Link through the website's Contact Us tab.

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. Oklahoma's tax rate for 2019 rises in eight stages to a maximum of 5 percent on taxable income over \$7,200 for single filers and \$12,200 for married filing jointly.

Write: Oklahoma Tax Commission, Income Tax, P.O. Box 26800, Oklahoma City OK 73126-0800.

Phone: (405) 521-3160

Website: www.tax.ok.gov

Email: otcmaster@tax.ok.gov

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. For 2019, Oregon's tax rate rises from 5 percent on taxable income over \$3,550 for single filers and \$7,100 for married filing jointly, in three steps to 9.9 percent on taxable income over \$125,000 for single filers and \$250,000 for joint filers. Oregon has no sales tax.

Write: Oregon Department of Revenue, 955 Center St. NE, Salem OR 97301-2555.

Phone: (800) 356-4222 or (503) 378-4988

Website: www.oregon.gov/DOR

Email: questions.dor@oregon.gov

PENNSYLVANIA

Pennsylvania's tax rate is a flat 3.07 percent. Pennsylvania tax authorities have ruled that Pennsylvania residents in the U.S. Foreign Service are not on active duty for state tax purposes, and thus their income is taxable compensation. For non-Foreign Service state 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. Pennsylvania does not, however, 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.

Write: Commonwealth of Pennsylvania, Department of Revenue, Taxpayer Services Department, Harrisburg PA 17128-1061.

Phone: (717) 787-8201

Website: www.revenue.pa.gov

Email: Link through the website's Contact Us tab.

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 any income from sources outside Puerto Rico. Taxes range from 7 percent of taxable income up to \$25,000, to 33 percent of the taxable income over \$61,500 for all taxpayers.

Write: Departamento de Hacienda, P.O. Box 9024140, San Juan PR 00902-4140.

Phone: (787) 622-0123, Option 8

Website: www.hacienda.gobierno.pr

Email: infoserv@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 2019 Rhode Island tax rate is 3.75 percent of taxable income up to \$64,050 for all filers, 4.75 percent for income over \$62,550, and 5.99 percent of taxable income over \$145,600 for all filers. Also, a 2010 change treats capital gains as ordinary taxable income. Refer to the tax division's website 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, Option 3

Website: www.tax.state.ri.us

Email: Tax.Assist@tax.ri.gov

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's 2019 tax rates rise in six steps to a maximum of 7 percent of South Carolina taxable income over \$12,250 for all filers.

Write: South Carolina Tax Commission, P.O. Box 125, Columbia SC 29214.



Phone: (844) 898-8542, Option 2, or (803) 898-5000
 Website: www.sctax.org
 Email: iitax@dor.sctax.gov, or link through the website's Contact Us tab.

SOUTH DAKOTA

There is no state income tax and no state inheritance tax. State sales and use tax is 4.5 percent; municipalities may add up to an additional 2.75 percent.

Write: South Dakota Department of Revenue, 445 East Capitol Ave., Pierre SD 57501-3185.
 Phone: (605) 773-3311
 Website: dor.sd.gov
 Email: Link through the website's Contact Us tab.

TENNESSEE

Salaries and wages are not subject to state income tax, but for 2019, Tennessee imposes a 2 percent tax on most dividends and interest income of more than \$1,250 (single filers) or \$2,500 (joint filers) in the tax year. This is planned to be reduced by 1 percent per year until elimination on Jan. 1, 2021.

Write: Tennessee Department of Revenue (Attention: Taxpayer Services), 500 Deaderick St., Nashville TN 37242.
 Phone: (615) 253-0600
 Website: www.tn.gov/revenue
 Email: TN.Revenue@tn.gov

TEXAS

There is no state personal income tax. State sales tax is 6.25 percent, with local additions adding up to 2 percent.


Write: Texas Comptroller, P.O. Box 13528, Capitol Station, Austin TX 78711-3528.
 Phone: (888) 334-4112 for Customer Service Liaison
 Website: www.comptroller.texas.gov
 Email: Link through the website's Contact Us tab.

UTAH

Utah has a flat tax of 4.95 percent on all income in 2019. 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. Some taxpayers will be able to claim either a taxpayer tax credit or a retirement tax credit, or both (see website for explanation).

Write: Utah State Tax Commission, Taxpayer Services Division, 210 North 1950 West, Salt Lake City UT 84134.
 Phone: (800) 662-4335 or (801) 297-2200
 Website: www.tax.utah.gov
 Email: Link through the website's Contact Us tab.


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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 2019 tax rate ranges from 3.35 percent on taxable income under \$39,600 for singles and \$66,150 for joint filers, to a maximum of 8.75 percent on taxable income over \$200,100 for singles and \$243,650 for joint filers.

Write: Vermont Department of Taxes, Taxpayer Services Division, 133 State St., Montpelier VT 05633-1401.

Phone: (802) 828-2505

Website: www.tax.vermont.gov

Email: tax.individualincome@vermont.gov, or link through the website's Contact Us tab.

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 nonresidents to file Form 763 if their Virginia Adjusted Gross Income (which includes any federal salary paid during time they are residing in Virginia) exceeds \$11,950 for single filers and married filing separately, or \$23,900 for married filing jointly.

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 if taxable income is over \$17,000. In addition, using Form R-1H, Virginia allows employers of household help to elect to pay state unemployment tax annually instead of quarterly.

Write: Virginia Department of Taxation, Office of Customer Services, P.O. Box 1115, Richmond VA 23218-1115.

Phone: (804) 367-8031

Website: www.tax.virginia.gov

Email: Link through the website's Contact Us tab.

WASHINGTON

There is no state income tax and no tax on intangibles such as bank accounts, stocks and bonds. Residents may deduct Washington sales tax on their federal tax returns if they itemize deductions. State tax rate is 6.5 percent; local additions can increase that to 10.4 percent in some areas.

Write: Washington State Department of Revenue, Taxpayer Services, P.O. Box 47478, Olympia WA 98504-7478.

Phone: (800) 647-7706 or (360) 705-6705

Website: www.dor.wa.gov

Email: Link through the website's Contact Us tab.

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, nonresident 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 4 percent of taxable income over \$10,000 for joint and single filers, to 6.5 percent of taxable income for joint and single filers over \$60,000.

Write: Department of Tax and Revenue, The Revenue Center, 1001 Lee St. E., Charleston WV 25337-3784.

Phone: (800) 982-8297 or (304) 558-3333

Website: www.wvtax.gov

Email: TaxHelp@WV.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 2019 tax rate rises in four steps from 4 percent on income up to \$11,760 for single filers or \$15,680 for joint filers, to a maximum of 7.65 percent on income over \$258,950 for single filers or \$345,270 for joint filers.

Write: Wisconsin Department of Revenue, Customer Service Bureau, P.O. Box 8949, Madison WI 53708-8949.

Phone: (608) 266-2486

Website: www.revenue.wi.gov

Email: DORIncome@wisconsin.gov, or link through the website's Contact Us tab.

WYOMING

There is no state income tax and no tax on intangibles such as bank accounts, stocks or bonds. State sales tax is 4 percent. Local jurisdictions may add another 2 percent sales tax and 4 percent for lodging.

Write: Wyoming Department of Revenue, Herschler Building, 122 West 25th St., Cheyenne WY 82002-0110.

Phone: (307) 777-5200

Website: revenue.wyo.gov

Email: dor@wyo.gov ■

2019 STATE PENSION AND 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. For example, Idaho taxes Foreign Service annuities while exempting certain categories of Civil Service employees. Several websites provide more information on individual state taxes for retirees, but the Retirement Living Information Center at www.retirementliving.com/taxes-by-state is one of the more comprehensive and is recommended for further information.

ALABAMA

Social Security and U.S. government pensions are not taxable. The combined state, county and city general sales and use tax rates range from 7 percent to as much as 8.65 percent.

ALASKA

No personal income tax. Most municipalities levy sales and/or use taxes of between 2 and 7 percent and/or a property tax. If over 65, you may be able to claim an exemption.

ARIZONA

U.S. government pensions are fully taxed, but up to \$2,500 may be excluded for each taxpayer. There is also a \$2,100 exemption for each taxpayer age 65 or over. Social Security is excluded from taxable income. Arizona state sales and use tax is 5.6 percent, with additions depending on the county and/or city.

ARKANSAS

The first \$6,000 of income from any retirement plan or IRA is exempt (to a maximum of \$6,000 overall). Social Security is excluded from taxable income. There is no estate or inheritance tax. State sales and use tax is 6.5 percent; city and county taxes may add another 5.5 percent.

CALIFORNIA

Pensions and annuities are fully taxable. Social Security is excluded from taxable income. The sales and use tax rate varies from 7.25 percent (the statewide rate) to 11 percent in some areas. CA Pub 71 lists all rates statewide.

COLORADO

Up to \$24,000 of pension or Social Security income can be excluded if individual is age 65 or over. Up to \$20,000 is exempt if age 55 to 64. State sales tax is 2.9 percent; local additions can increase that to as much as 11.2 percent.

CONNECTICUT

Pensions and annuities are fully taxable for residents. Social Security is exempt if Federal Adjusted Gross Income is less than \$50,000 for singles or \$60,000 for joint filers. Statewide sales tax is 6.35 percent. No local additions.

DELAWARE

Government pension exclusions per person: \$2,000 is exempt under age 60; \$12,500 if age 60 or over. There is an additional standard deduction of \$2,500 if age 65 or over if you do not itemize. Social Security is excluded from taxable income. Delaware does not impose a sales tax.

DISTRICT OF COLUMBIA

Pensions and annuities are fully taxed for residents. Social Security is excluded from taxable income. Sales and use tax is 5.75 percent, with higher rates for some commodities (e.g., liquor, meals).

FLORIDA

There is no personal income, inheritance, gift tax or tax on intangible property. All property is taxable at 100 percent of its just valuation, but many exemptions are available. The state sales and use tax is 6 percent. There are additional county sales taxes, which could make the combined rate as high as 9.5 percent.

GEORGIA

Up to \$35,000 of retirement income may be excludable for those age 62 or older or totally disabled. Up to \$65,000 of retirement income may be excludable for taxpayers who are 65 or older. Social Security is excluded from taxable income. Sales tax is 4 percent statewide, with additions of up to 3 percent depending on jurisdiction.

HAWAII

Pension and annuity distributions from a government pension plan are not taxed. Social Security is excluded from taxable income. Hawaii charges a general excise tax of 4 percent instead of sales tax.

IDAHO

If the individual is age 65 or older, or age 62 and disabled, Civil Service Retirement System and Foreign Service Retirement and Disability System pensions qualify for a deduction. Refer to Form 38 R for details. Federal Employees Retirement System or Foreign Service Pension System pensions do not qualify for this deduction. The deduction is reduced dollar for dollar by Social Security benefits. Social Security itself is not taxed. Idaho state sales tax is 6 percent; some local jurisdictions add as much as another 3 percent.

ILLINOIS

Illinois does not tax U.S. government pensions, TSP distributions or Social Secu-

rity. State sales tax is 6.25 percent. Local additions can raise sales tax to 11 percent in some jurisdictions.

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 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. Social Security is excluded from taxable income. Sales tax and use tax is 7 percent.

IOWA

Generally taxable. A married couple with an income for the year of less than \$32,000 may file for an exemption, if at least one spouse or the head of household is 65 years or older on Dec. 31; and single persons who are 65 years or older on Dec. 31 may file for an exemption if their income is \$25,000 or less. Social Security is excluded from taxable income. Statewide sales tax is 6 percent; local option taxes can add up to another 7 percent.

KANSAS

U.S. government pensions are not taxed. There is an extras deduction of \$850 if over 65. Social Security is exempt if Federal Adjusted Gross Income is under \$75,000. State sales tax is 6.5 percent, with additions

of between 1 and 4 percent depending on jurisdiction.

KENTUCKY

Government pension income is exempt if retired before Jan. 1, 1998. If retired after Dec. 31, 1997, pension/annuity income up to \$41,110 remains excludable in 2019 depending on date of retirement. Social Security is excluded from taxable income. Sales and use tax is 6 percent statewide, with no local sales or use taxes.

LOUISIANA

Federal retirement benefits are exempt from 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. Social Security is excluded from taxable income. State sales tax is 5 percent with local additions up to a possible total of 10.75 percent. Use tax is 8 percent regardless of the purchaser's location.

MAINE

Recipients of a government-sponsored pension or annuity who are filing singly may deduct up to \$10,000 (\$20,000 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 \$1,600 (filing singly) or \$2,600 (married filing jointly). General sales

tax is now 5.5 percent; 8 percent on meals and liquor.

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 \$30,600 in tax year 2019. Also, all individuals 65 years or older are entitled to an extra \$1,000 personal exemption in addition to the regular \$3,200 personal exemption available to all taxpayers. Social Security is excluded from taxable income. See the worksheet and instructions in the Maryland Resident Tax Booklet. General sales tax is 6 percent; 9 percent on liquor.

MASSACHUSETTS

Federal pensions and Social Security are excluded from Massachusetts gross income. Each taxpayer over age 65 is allowed an additional \$700 exemption on other income. Sales tax is 6.25 percent.

MICHIGAN

Federal, and state/local government pensions may be partially exempt, based on the year you were born and the source of the pension. (a) If born before 1946, private pension or IRA benefits included in AGI are partially exempt; public pensions are exempt. (b) If born after 1946 and before 1952, the exemption for public and private pensions is limited to \$20,000

for singles and \$40,000 for married filers.

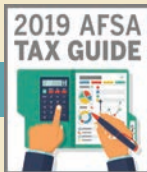
(c) If born after 1952, not eligible for any exemption until reaching age 67. Social Security is excluded from taxable income. Full details at: <https://www.michigan.gov/taxes/0,4676,7-238--459647--,00.html>. Michigan's state sales tax rate is 6 percent. There are no city, local or county sales taxes.

MINNESOTA

Social Security income is taxed by Minnesota to the same extent it is on your federal return. If your only income is Social Security, you would not be required to file an income tax return. All federal 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 nontaxable Social Security is under \$9,600. For a couple who are both over 65, the limits are \$42,000 for Adjusted Gross Income and \$12,000 for nontaxable Social Security. Statewide sales and use tax is 6.875 percent; a few cities and counties also add a sales tax, which can be as high as 8.375 percent.

MISSISSIPPI

Social Security, qualified retirement income from federal, state and private retirement systems, and income from IRAs are exempt from Mississippi tax. There is an additional exemption of \$1,500 on other income if



over 65. Statewide sales tax is 7 percent.

MISSOURI

Up to 65 percent of public pension income may be deducted if Missouri Adjusted Gross Income is less than \$100,000 when married filing jointly or \$85,000 for single filers, up to a limit of \$36,976 for each spouse. The maximum private pension deduction is \$6,000. You may also deduct 100 percent of Social Security income if over age 62 and Federal Adjusted Gross Income is less than the limits above. Sales tax is 4.225 percent; local sales and use tax additions may raise the total to 10.1 percent.

MONTANA

Montana taxes all pension and retirement income received while residing in Montana. Those over 65 can exempt an additional \$800 of interest income for single taxpayers and \$1,600 for married joint filers. For taxpayers with an AGI income under \$25,000 (single filers) or \$32,000 (joint filers), all Social Security retirement income is deductible. For taxpayers above those limits but below \$34,000 (single filers) or \$44,000 (joint filers), half of Social Security retirement income is deductible. Above those second-level limits, 15 percent is deductible. Montana has no general sales tax, but tax is levied on the sale of various commodities.

NEBRASKA

U.S. government pensions and annuities are fully taxable. Social Security is taxable. State sales tax is 5.5 percent, with local additions of up to 2 percent.

NEVADA

No personal income tax. Sales and use tax varies from 6.85 to 8.1 percent, depending on local jurisdiction.

NEW HAMPSHIRE

No personal income tax. There is no inheritance tax. 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. No general sales tax.

NEW JERSEY

Pensions and annuities from civilian government service are subject to state income tax, with exemptions for those age 62 or older or totally and permanently disabled. However, see this link for the distinction between the "Three-Year Method" and the "General Rule Method" for contributory pension plans: <http://www.state.nj.us/treasury/taxation/njit6.shtml>. For 2019, qualifying singles and heads of households may be able to exclude up to \$45,000 of retirement income; those married filing jointly up to \$60,000; those married filing separately up to \$30,000 each. These exclusions are eliminated for New Jersey gross incomes

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over \$100,000. Residents over 65 may be eligible for an additional \$1,000 personal exemption. Social Security is excluded from taxable income. State sales tax is 6.675 percent.

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 Mexico has a gross receipts tax, instead of a sales tax, of 5.125 percent; county and city taxes may add another 3.9375 percent.

NEW YORK

Social Security, 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 at <https://www.tax.ny.gov/pdf/publications/income/pub36.pdf> for details. Sales tax is 4 percent statewide. Other local taxes may add up to an additional 5 percent.

NORTH CAROLINA

Pursuant to the “Bailey” decision (see <http://dornc.com/taxes/individual/benefits.html>), 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. For those over 65, an extra \$750 (single) or \$1,200 (couple) may be deducted. Social Security is excluded from taxable income. State sales tax is 4.75 percent; local taxes may increase this by up to 3 percent.

NORTH DAKOTA

All pensions and annuities are fully taxed. Social Security is excluded from taxable income. General sales tax is 5 percent; 7 percent on liquor. Local jurisdictions impose up to 3 percent more.

OHIO

Retirement income is taxed. 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 Ohio Adjusted Gross Income, reaching a maximum of \$200 for any retirement income over \$8,000. Social Security is excluded from taxable income. State sales tax is 5.75 percent. Counties and regional transit authorities may add to this, but the total must not exceed 8.75 percent.

OKLAHOMA

Individuals receiving FERS/FSPS or private pensions may exempt up to \$10,000, but not to exceed the amount included in the Federal Adjusted Gross Income. Since 2011, 100 percent of a federal pension paid in lieu of Social Security (i.e., CSRS and FSRDS—“old system”—including the CSRS/FSRDS portion of an annuity paid under both systems) is exempt. Social Security included in FAGI is exempt. State sales tax is 4.5 percent. Local and other additions may bring the total up to 9.5 percent.

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. If you are over age 62, a tax credit of up to 9 percent of taxable pension income, including most private pension income, is available for pension recipients whose household income was less than \$22,500 (single) and \$45,000 (joint), and who received less than \$7,500 (single)/\$15,000 (joint) in Social Security benefits. The credit is the lesser of the tax liability, or 9 percent of taxable pension income. Social

Security is excluded from taxable income. Oregon has no sales tax.

PENNSYLVANIA

Government pensions and Social Security are not subject to personal income tax. Pennsylvania sales tax is 6 percent. Other taxing entities may add up to 2 percent.

PUERTO RICO

The first \$11,000 of income received from a federal pension can be excluded for individuals under 60. For those over 60, the exclusion is \$15,000. If the individual receives more than one federal pension, the exclusion applies to each pension or annuity separately. Social Security is excluded from taxable income.

RHODE ISLAND

U.S. government pensions and annuities are fully taxable. However, effective the 2017 tax year, taxpayers eligible for Social Security may take a \$15,000 exemption on their retirement income. This applies to single taxpayers with FAGIs of up to \$80,000 and to joint taxpayers up to \$100,000 that are otherwise qualified. Social Security is taxed to the extent it is federally taxed. Sales tax is 7 percent; meals and beverages 8 percent.

SOUTH CAROLINA

Individuals under age 65 can claim a \$3,000 deduction on qualified retirement income; those age 65 or over may claim a \$15,000

deduction on qualified retirement income (\$30,000 if both spouses are over 65) but must reduce this figure by any other retirement deduction claimed. Social Security is excluded from taxable income. Sales tax is 6 percent plus up to 3 percent in some counties. Residents who are age 85 and over pay 5 percent.

SOUTH DAKOTA

No personal income tax or inheritance tax. State sales and use tax is 4.5 percent; municipalities may add up to an additional 2.75 percent. Residents who are age 66 and older and have a yearly income of under \$10,250 (single) or in a household where the total income was under \$13,250 are eligible for a sales tax or a property tax refund.

TENNESSEE

Social Security, pension income and income from IRAs and TSP are not subject to personal income tax. In 2019, most interest and dividend income is taxed at 2 percent if over \$1,250 (single filers) or \$2,500 (married filing jointly). However, for tax year 2015 and subsequently, those over 65 with total income from all sources of less than \$37,000 for a single filer and \$68,000 for joint filers are completely exempt from all taxes on income. State sales tax is 5 percent on food; 7 percent on other goods, with between 1.5 and 2.75 percent added, depending on jurisdiction.

TEXAS

No personal income tax or inheritance tax. State sales tax is 6.25 percent. Local options can raise the rate to 8.25 percent.

UTAH

Utah has a flat tax rate of 4.95 percent of all income. For taxpayers over 65 there is a retirement tax credit of \$450 for single filers and \$900 for joint filers. This is reduced by 2.5 percent of income exceeding \$25,000 for single filers and \$32,000 for joint filers. See the state website for details. State sales tax ranges from 5.95 percent to 8.60 percent, depending on local jurisdiction.

VERMONT

U.S. government pensions and annuities are fully taxable. Social Security is taxed to the extent it is federally taxed. State general sales tax is 6 percent; local option taxes may raise the total to 7 percent (higher on some commodities).

VIRGINIA

Individuals over age 65 can take a \$12,000 deduction. The maximum \$12,000 deduction is reduced by one dollar for each dollar by which 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 is excluded from taxable income. The estate tax was repealed for

all deaths after July 1, 2007. The general sales tax rate is 5.3 percent (4.3 percent state tax and 1 percent local tax, with an extra 0.7 percent in Northern Virginia).

WASHINGTON

No personal income tax. Retirement income is not taxed. State sales tax is 6.5 percent; rates are updated quarterly. Local taxes may increase the total to 10.4 percent.

WEST VIRGINIA

\$2,000 of any civil or state pension is exempt. Social Security income is taxable only to the extent that the income is includable in Federal Adjusted Gross Income. Taxpayers 65 and older or surviving spouses of any age may exclude the first \$8,000 (individual filers) or \$16,000 (married filing jointly) of any retirement income. Out-of-state government pensions qualify for this exemption. State sales tax is 6 percent, with additions of between 0.5 and 1 percent in some jurisdictions.

WISCONSIN

Pensions and annuities are fully taxable. Social Security is excluded from taxable income. Those age 65 or over may take two personal deductions totaling \$950. Benefits received from a federal retirement system account established before Dec. 31, 1963, are not taxable. Those over 65 and with a FAGI of less than \$15,000 (single filers) or \$30,000

(joint filers) may exclude \$5,000 of income from federal retirement systems or IRAs. Those over 65 may take an additional personal deduction of \$250. State sales tax is 5 percent; most counties charge an extra 1.5 percent.

WYOMING

No personal income tax. State sales tax is 4 percent. Local taxes may add up to 2 percent on sales and 4 percent on lodging. ■

■ **Kristen Bracewell Deming**, 80, wife of Ambassador (ret.) Rust M. Deming, died peacefully at home in Bethesda, Md., on Oct. 21, 2019, after a decade-long battle with lung disease.

Mrs. Deming was born Kristen Bracewell in Gainesville, Fla., in 1939. She grew up in Jacksonville and attended Rollins College in Winter Park, Fla., graduating in 1962. While a student, she won the Academy of American Poets Prize for Colleges and Universities.

Friends note that Mrs. Deming was an accomplished haiku poet and artist. As an integral partner in her husband's 38-year Foreign Service career, Mrs. Deming excelled at her own brand of cultural diplomacy, drawing on her artistic talents, innate interest in other people and cultures, and her sincerity and empathy during four tours of duty in Japan and two in Tunisia.

In Japan, Mrs. Deming was active in organizing English-language haiku and Tanka poetry gatherings. One of her most effective contributions to cultural diplomacy was a weekly poetry column in the *Japan Times* called "Haiku Moments" that she co-wrote with a Japanese colleague for six years.

The column helped to open the world of haiku to English speakers and to give glimpses of Japanese culture through the lens of poetry. She was among a handful of non-Japanese invited to the New Year's Poetry Reading Party at the Imperial Court, the annual competition in which selected poems are recited in the presence of the Imperial Family.

While in Japan, Mrs. Deming also served as president of the Tokyo-Washington Women's Club, was active in women's international charity groups and taught English in a private Japanese middle school.

Mrs. Deming enjoyed sculpting ginger-

bread cookies in the form of caricatures of folk characters and public figures, including politicians and sumo wrestlers. In the 1980s, her "cookie art" was the subject of a *Washington Post* food section feature and a Japanese television news segment.

After returning to the United States in 1997, Mrs. Deming served as president of the Haiku Society of America in 1998 and produced an award-winning volume of poetry. Her final overseas living experience was in Tunisia, a country that had been the couple's first Foreign Service assignment 34 years earlier.

While her husband served as ambassador to Tunisia from 2000 to 2003, Mrs. Deming reached out to the local artistic community and to the wives of Tunisian officials and Arab diplomats. Her sincerity and warmth won her many friends, even from those whose governments strongly opposed U.S. policies, particularly after the 2003 invasion of Iraq.

At one point during the war, Mrs. Deming invited a group of Tunisian and Arab embassy women to her home for tea. The group came, but only after making clear they were not visiting the residence of the American ambassador; they were visiting "their friend Kristen's home."

In addition to many poetry honors, Mrs. Deming was the recipient, along with her husband, of the Japan-America Society of Washington, D.C.'s 2016 Marshall Green Award for "sustained and significant contribution to U.S.-Japan relations."

Mrs. Deming is survived by her husband of 56 years, Rust Deming of Bethesda, Md.; daughters, Justine Rodriguez of San Bernardino, Calif., Jennifer Burnham of Los Altos Hills, Calif., and Katherine Brodie of Chevy Chase, Md.; and seven grandchildren.

Donations in her name may be made to the Haiku Society of America (www.hsa-haiku.org).

■ **Daniel Ted Fantozzi**, 68, a retired Foreign Service officer, died peacefully in his sleep on Oct. 27, 2019, at his home in Falls Church, Va., after a battle with cancer.

Mr. Fantozzi was born in Buffalo, N.Y. After graduating from Georgetown University's Walsh School of Foreign Service and obtaining an MBA from American University, Mr. Fantozzi joined the Foreign Service. He had a distinguished career with the Department of State for more than 30 years, retiring with the rank of Minister Counselor.

Mr. Fantozzi spent much of his career in Washington, D.C., but was also stationed in Sapporo, Zagreb, The Hague and Tokyo. After retirement, he again worked at the State Department as a senior editor for the annual report on the status of religious freedom worldwide.

Before he died, Mr. Fantozzi was able to visit with all four of his children. Mr. Fantozzi contributed to many charitable organizations. Among them are Catholic Relief Services, Habitat for Humanity, Doctors Without Borders, Food for Others, UNICEF and Cross Catholic Services.

He is survived by his wife of 45 years, Gay; their four children, Daniel, Victoria, Lydia and Nathan; four grandsons; and his siblings, Peter, Mary Ann and Thomas.

His family notes that a contribution in his name to any of the charitable groups he supported would have pleased him.

■ **Marjorie Ann Morris**, 70, the spouse of a retired Foreign Service officer, died on July 15, 2019, in Denton, Texas.

Born in Oceanside, N.Y., the daughter of Jacob and Marjorie (Mann) Nerenberg, Ms. Morris attended J.E.B. Stuart High School (now Justice High School) in Falls Church, Va. She earned her bachelor's degree in Russian from Emory University

and her master's degree in comparative literature from the University of Georgia.

She met her husband, John Daniel Morris, when they were studying at Emory University. In 1969 they were married at Sheppard Air Force Base in Wichita Falls, Texas. They spent two years at Columbus Air Force Base in Mississippi, and two years in Japan while Mr. Morris served in the U.S. Air Force.

Ms. Morris spent 30 years as a U.S. Foreign Service spouse. Mr. Morris' work with the State Department took the couple to Indonesia, England, Hungary, Taiwan and China. Friends say Ms. Morris' friendliness, her skill at hosting diplomatic functions and her foreign language skills did much to support her husband's Foreign Service career.

She also taught fifth grade and high school English and journalism at Taipei American School and worked at the Overseas Briefing Center in Washington, D.C.

Ms. Morris spent her retirement enjoying her grandchildren, visiting friends, traveling, participating in book clubs and conducting volunteer research on William Faulkner.

A wife, mother and grandmother, she leaves her husband, Dan; her daughter Rebecca Morris (and husband Robert Gross) and their son, Sam of Denton, Texas; and her daughter Cathy Roche (and husband Bjorn Roche) and their sons, Sebastian and Casey of New York, N.Y. She also leaves two brothers, Jon Nerenberg of Roseburg, Ore., and Lawrence Nerenberg of Papa'aloa, Hawaii.

■ **Warren Carl Putnam**, 93, a retired Foreign Service officer for USAID, passed away on July 21, 2019, of cardiac failure on his farm, Hawk's Ridge, in West Virginia.

Mr. Putnam was born in Woodhaven, N.Y., on Dec. 24, 1925. He went to high school in Lambertville, N.J. At 17, he

joined the Navy to become a pilot but was told there were enough pilots in the program. Instead, he was sent to Williams College in Massachusetts to become an officer.

Impatient to join World War II, he decided to get himself expelled by breaking windows. The Navy then sent him to submarine school in New London, Conn. Before deploying to the Pacific, he and a couple of other mates were selected to spend the rest of the war selling war bonds on the recently captured German submarine, the U-505.

He received an honorable discharge from the Navy Submarine Service in 1946. Mr. Putnam's memorabilia from his time on the U-505 were donated to the Museum of Science and Industry in Chicago, where the submarine is housed.

Returning to civilian life, Mr. Putnam earned a bachelor's degree in agriculture and animal husbandry at Rutgers University in 1950. Following graduation, he used his GI Bill benefits to attend the Sorbonne in Paris for a year and to travel extensively around Europe. In Europe, he observed the Marshall Plan in action, fueling his interest in international development.

Mr. Putnam served with USAID twice, from 1962 to 1965 (St. Lucia and South Korea) and from 1979 to 1986 (Somalia and Washington, D.C.). During his overseas career, he also worked for several USAID contractors. He took time off twice to run his own businesses, including Ramier Estate in St. Lucia where he raised tropical flowers, vegetables, tree crops, forage and sheep.

He continued consulting after retirement. In 1995, he moved to a farm in rural West Virginia, where he bred and sold Boykin Spaniels.

Mr. Putnam was an avid hunter, deep sea fisherman, skier and sailor. Friends say he was a great storyteller. Some of his tales

can be found in his self-published book, *Put's Tales*. One of Mr. Putnam's more memorable experiences was a 10-day trek on foot across northern Tanzania to help a Maasai pal move a herd of cattle. He traveled with only water, a local "thimbo" and a rifle.

Mr. Putnam's wife of 42 years, Patricia, who accompanied him on all his long-term assignments, died in 1994. Since 1995 he has been with Dorothy Carlson, who survives him.

He is also survived by a son, Duncan (and his wife Jeanette Dickerson-Putman) of Keuka Park, N.Y.; two daughters, Diana, an FSO with USAID (and her husband Adam Messer) of Carlisle, Pa., and Alexandra of Poughkeepsie, N.Y.; three granddaughters, Kristen Corl, Bridget Laubacker and Clarissa Messer; and one great-granddaughter, Claire Corl.

■ **Karin Sherwood (née Willamowski)**, 67, a former Foreign Service National at the U.S. embassy in Bonn and the wife of retired FSO Harrison Sherwood, died in Cambridge, England, on Oct. 21, 2019.

Mrs. Sherwood was born in England to Gerhardt, from East Prussia, and Brigitte, from Silesia (both regions were lost to Germany at the conclusion of World War II). A prisoner of war, her father was allowed to stay in Britain where he was valued as a farm worker and mechanic. Her mother was recruited as a mother's help by the British Red Cross, from Hanover, where her family had settled at the end of the war. She was employed in Kent when she married Gerhardt; Karin was their first-born of two daughters.

The family moved to Basingstoke, Hampshire, in the mid-1950s, where Ms. Willamowski received her schooling, culminating in a certificate of business from the Basingstoke Technical College.

Bilingual, she moved to Germany in the early 1970s and ended up as a commercial specialist at U.S. Embassy Bonn. She met and married her husband, Mr. Sherwood, who also worked in the commercial section, in 1984. In 1985, they were transferred to Washington, D.C.

As she had already taken some IT courses at branches of the University of Maryland in Germany, she enrolled in the university's main campus in College Park. She earned her bachelor's degree in 1986 and the next day enrolled in a graduate program in management information systems at the American University in Washington, D.C.

The Sherwoods were assigned to The Hague in 1986. Mrs. Sherwood was able to complete her degree in 1988, mainly by correspondence, and was elected to the academic society Phi Kappa Phi as a result of her outstanding scholarship.

In Holland, Mrs. Sherwood worked for the IT branch of KPMG in Utrecht. She designed management information systems for the Alsmeer Flower Auction, Heineken, KLM and the Dutch Environmental Protection Agency, among others. In 1990 she gave birth to her son, Colin.

After a short stay in Mexico City, the family was transferred to Stockholm, where Mr. Sherwood retired in 1993. In Sweden, Mrs. Sherwood worked for the Swedish telephone company Tele2. Later, she took a position with Analysys, based in Cambridge. Her son prospered in school and eventually graduated from Oxford with a degree in history.

During Mrs. Sherwood's employment in England, she authored and co-authored detailed studies of specific markets. After finishing at Analysys, she worked for another eight years at Oxford Intelligence, a research firm specializing in attracting foreign investment to the U.K.

In recent years she changed emphasis

and went back to her German, teaching teenagers and adults in several schools in and around Cambridge.

Karin Sherwood is survived by her husband of 35 years, Harrison, and her son, Colin, an official at HM Treasury in London.

■ **Marsha Lynne Singer**, 62, a Foreign Service officer, died on April 28, 2019, in Arlington, Va., after battling ovarian cancer for more than a year.

Ms. Singer received a bachelor's degree in political science and a law degree from the University of Florida, as well as a master of law degree in real estate law from the University of Miami.

Before joining the Foreign Service, Ms. Singer had been an FS spouse, accompanying her husband, FSO David C. Grier, to Caracas. There she served as the community liaison officer.

As an FSO, she served as a consular officer in Krakow, desk officer in the Bureau of European and Eurasian Affairs and the Bureau of Western Hemisphere Affairs, coordinator of the President's Emergency Plan For AIDS Relief (PEPFAR) in South Africa and economic officer in Caracas.

She was finishing her second year of Arabic in Cairo, in preparation to become the economic officer in Alexandria, when she was diagnosed with cancer.

Ms. Singer was an avid reader, gardener, bird watcher, pet lover and fan of cooking shows.

She is survived by her husband, David Grier, son Matthew, mother Ruth, sister Sara, brother William and three nieces and two nephews.

■ **Robert Strand**, 83, a retired Foreign Service officer, died on June 20, 2019, in Baltimore, Md.

He was born on June 25, 1935, in Lake-

wood, Ohio, to Dorothy and Edwin Strand. Edwin was an attorney for Ohio Bell, and Dorothy, née Reilly, was an interior decorator and former dancer.

In 1953, Mr. Strand graduated second in his class from University School in Shaker Heights. In 1957, he graduated third in his class from Amherst College, where he earned a bachelor's degree in American studies and an honorable mention as an All-New England midfielder in soccer.

He then attended Queens College, Cambridge, as a Marshall Scholar, earning a bachelor's degree in 1959, and several years later a master's degree, in moral sciences.

After completing Army basic training, Mr. Strand joined the State Department in 1961. He spent the early part of his career in Africa, including postings in Enugu, Eastern Nigeria, during the lead-up to the Biafran Civil War, and Zaire (now DRC), where he reopened the U.S. consulate in Kisangani in the wake of the Simba Rebellion.

Returning to the United States, he and his family settled in Falls Church, Va. Then, after a stint in Moscow, Mr. Strand began the major focus of his Foreign Service career: arms control.

Starting at State, he worked on the Strategic Arms Limitation Talks and the subsequent Strategic Arms Reduction Treaties. Then, on loan to the Arms Control and Disarmament Agency, he worked on the Mixed and Balanced Force Reduction talks—first in Belgrade at a Committee for Security and Cooperation in Europe conference, and later at a United Nations special session on arms control.

Finally, Mr. Strand was assigned for three years to the U.S. mission to NATO, where he worked again on the MBFR and on the first round of the Intermediate-

Range Nuclear Forces Treaty. When the SALT talks began in 1969, the United States and the Soviet Union combined had 30,000 nuclear weapons deployed. Today, that number is 1,400.

Mr. Strand's last Foreign Service assignment was as deputy director, then acting director, of the politico-military affairs office in the department's Bureau of Intelligence and Research. He retired from the Foreign Service in 1986, but continued to serve as a reviewer, then senior reviewer, in the Freedom of Information Act office until 2016.

In 1961, while serving at the embassy in Conakry, Mr. Strand met Penelope Ann Packard. They married in Conakry in 1963. Married for 52 years, they shared a love of opera. Mrs. Strand, a classical singer and photographer, died in 2015.

Mr. Strand also loved theater, architecture (he spent a summer touring European cathedrals with his family), the great outdoors (he took his family on many hiking trips to the Blue Ridge Mountains) and, especially, literature.

Mr. Strand was his wife's sole caretaker during the last year of her life.

He is survived by his sons, Stratton, a senior attorney for the Department of Justice, and Ashley, an actor and a teacher; and three grandchildren.

■ **Joseph C. Wilson IV**, 69, a retired FSO and former ambassador, died on Sept. 27, 2019, in Santa Fe, N.M., after a long illness.

Mr. Wilson was born Nov. 6, 1949, in Bridgeport, Conn. He grew up in California and Europe before earning a bachelor's degree in history from the University of California, Santa Barbara, in 1968.

Mr. Wilson enjoyed a 22-year career in the Foreign Service, starting in 1976.

Early on, Mr. Wilson made it clear to an A-100 classmate that he intended

to focus his career on Africa, because it was the quickest way to the top and he was fluent in French. Indeed, early in his career, he held administrative positions in Niger, Togo and South Africa, and served as deputy chief of mission in Burundi and the Republic of the Congo (Brazzaville).

He often joked that when he was hired, he recommended himself for a position in Paris given his French fluency and was told that they had a placement for him in a former French colony that was just like Paris. That was Niamey, Niger.

Mr. Wilson is best known for his work on Iraq during the first and second Gulf Wars. In 1990, as chargé d'affaires in Baghdad when Saddam Hussein invaded Kuwait, he was the last American diplomat during this period to speak with Saddam Hussein, telling him in no uncertain terms to withdraw from Kuwait.

Despite Saddam's threats, Mr. Wilson successfully evacuated several thousand Americans and other nationals from Iraq, for which President George H.W. Bush hailed him as "a true American hero." Secretary of State James Baker III thanked him for his outstanding service to the nation during that time.

He served as ambassador to Gabon and São Tomé and Príncipe from 1992 to 1995; political adviser (POLAD) to General James Jamerson, commander in chief of United States Armed Forces, Europe (EUCOM); and as senior director for African affairs at the National Security Council under President Bill Clinton.

Amb. Wilson retired from the Foreign Service in 1998 but could never shake Iraq. In 2002, he traveled to Niger, at the CIA's request, to investigate the possibility that Saddam Hussein had purchased yellowcake uranium to use in his nuclear weapons program. He could find no evidence of such purchases.

When President George W. Bush,

in his 2003 State of the Union address, declared that Saddam Hussein had recently sought significant quantities of uranium from Africa, Amb. Wilson was compelled to write an opinion piece in *The New York Times*, "What I Didn't Find in Africa," in which he concluded that "the intelligence related to Iraq's nuclear weapons program was twisted to exaggerate the Iraqi threat."

What happened after that is widely known. Amb. Wilson's wife, Valerie Plame, who was working undercover for the CIA, had her cover blown by the Bush administration (presumably in retaliation for his op-ed), and had no choice but to leave the CIA.

After an investigation by a special counsel, senior administration officials were found guilty; and the whole episode was made into a movie, "Fair Game." Amb. Wilson documented his experience in public service and the subsequent events of 2002 in his *New York Times* bestselling book, *The Politics of Truth*.

Subsequently, Amb. Wilson and Ms. Plame moved to Santa Fe, N.M. Having been bitten by the Africa bug early on, Amb. Wilson would never lose his love for the continent. He worked as a consultant primarily assisting in electrical infrastructure projects throughout Africa. After fully retiring, he taught a course at University of California, Santa Barbara, on American foreign policy after World War II.

His first marriage, to Susan Otchis in 1974, ended in divorce in 1986. His second marriage, to Jacqueline Giorgi, a French diplomat, lasted from 1986 to 1998; and his 19-year marriage to Ms. Plame ended in 2017.

Amb. Wilson is survived by his brother, William; four children (twins Joseph C. Wilson V and Sabrina Ames, and twins Trevor and Samantha); and five grandchildren. ■

A Hippo Encounter

BY PETER KENNETT

While serving in Uganda, Megan and I would enjoy taking our bright red Jeep, affectionately named Elmo, off-road, driving and camping on weekends. We have some excellent off-road trail maps for our GPS that not only allow us to navigate fun trails but also give me plenty of opportunities for wildlife photography.

On one occasion last May, Megan was driving and came across a muddy pothole that split the trail. These are not uncommon on Ugandan trails, as warthogs and the occasional buffalo will often wallow in the mud until a pothole forms as wide as the road itself. This one was no different ... until Elmo got closer.

Suddenly, a massive two-ton hippopotamus lifted his great bulk and crawled out of the watery mud. Hippos will often sleep in these conditions to stay cool during the day after grazing all night.

I was anxious about being there. The most dangerous land animal in the world, the hippo is highly aggressive and unpredictable, and is responsible for



PETER KENNETT

Stand-off.



PETER KENNETT

Angry.



After a 23-year career in the U.S. Air Force, Peter Kennett joined the State Department as an office management specialist in 2005. He has served

in Warsaw, Pretoria, Islamabad, Singapore, Baghdad, Budapest and Kampala. During this time he developed fine skills in landscape and wildlife photography, which he now practices full-time in the American Southwest. He and his wife, Megan, are both newly retired from the Foreign Service and now live on their small ranch in New Mexico.

some 500 human deaths a year. But I had to get a photo before we drove away.

Megan reluctantly turned off the engine to calm the big guy so he would go back to his muddy hole. It worked! After a few minutes, he slowly went back and settled into his warm bath. I took some casual shots from the jeep, but nothing special.

We were far from a real road, with no cell coverage, and needed to move on. Megan started Elmo and very slowly moved forward to go around the pothole. The hippo, however, was having none of that.

He rose up again and trotted out of the mud, but this time stood his ground. Megan stopped. Because hippos have poor eyesight, he sniffed the air to see what crazy red beast was near him. He opened his mouth and showed us his ivory teeth while slowly approaching Elmo to make out what manner of beast this was.

I was busy snapping pictures out the window when I noticed that he was quickly filling the view in my camera. His face dripping with mud and saliva, he suddenly stopped and huffed a loud puff of air at us.

I think he decided Elmo was not welcome anymore. He picked up the pace and started to trot toward us as if to attack.

I yelled to Megan to go, go, go, and Elmo was off!

The hippo reared his head, swaying back and forth. Mud flew from his face as he let out a bellow—he was obviously very angry. Elmo flew across the wet tracks, throwing mud high in the air.

In the rearview mirror, Megan could see him charging behind (hippos can run up to 30 kilometers an hour). Before it was too bumpy to continue, I stuck my head out the window and grabbed a few shots. We were high on adrenaline.

He was not a happy hippo, but I imagine he was satisfied that he had won that battle against the large red beast. ■



PETER KENNETT

Roar.

I was busy snapping pictures out the window when I noticed that he was quickly filling the view in my camera.



PETER KENNETT

Chase.

A Case Study in Leadership

Terrorism, Betrayal, and Resilience: My Story of the 1998 U.S. Embassy Bombings

Prudence Bushnell, Potomac Books, 2018, \$29.95/hardcover, \$29.95/Kindle, 288 pages.

REVIEWED BY SUSAN BRADY MAITRA



Greater public understanding of and appreciation for professional diplomacy are essential to U.S. foreign and national security policymaking.

In recent months, as an unintended consequence of the impeachment imbroglio, Americans have had the opportunity to get to know several members of the U.S. Foreign Service. They have heard firsthand about what career diplomats do, how they do it, where and why from the diplomats themselves, on national television and in the media.

Prudence Bushnell's memoir offers a similar opportunity to the ordinary American. It is a "day in the life" of a career American diplomat, unusual in its own right; but this wasn't just any day, and the candor of the narrator is truly unique.

In *Terrorism, Betrayal, and Resilience*, the retired Senior FSO presents a riveting account of the Aug. 7, 1998, al-Qaida bombing of American embassies in Kenya (where she was chief of mission) and Tanzania; it is not only readily accessible to John Q. Public, but a stirring read to boot.

Beyond the compelling story, the

strength and conviction of Bushnell's voice naturally draw the reader into consideration of the event's significance and the fundamental questions the experience raised—for the author as a female career diplomat and U.S. ambassador, for the Foreign Service, for the State Department and for U.S. foreign policy and national security.

"This book is important for many reasons," General Anthony Zinni, former CENTCOM commander, said in his endorsement of *Terrorism, Betrayal, and Resilience*. "It vividly presents a profile in courage; an understanding rarely appreciated about our Foreign Service men and women working in difficult assignments; a set of valuable lessons learned; and a case study in leadership during crisis."

The first part—"What Happened?"—starts with the day of the bombing,

Amb. Bushnell's willingness to speak the truth to the powers that be, both foreign and domestic, shines throughout this memoir.

interjects a flashback on how the author got there, and proceeds through the days and months following the attack to Bushnell's assignment as U.S. ambassador to Guatemala in 2002 and, finally, her retirement from the Foreign Service in 2005.

Even if one is already familiar with the events, Amb. Bushnell summons so many vivid details of Aug. 7 and the days leading up to and after it, that the horror is fresh and the tragedy palpable. Special, and striking in this first-person account, is her fine attention to the aftermath—how she and others worked to come to terms with what had happened, deal with the personal trauma, and find ways to lead and cultivate lead-

ership in others through the wreckage.

In part two—"How Did It Happen?"—Bushnell explores how the bombings happened, in light of the scrutiny bin Laden and his cell in Nairobi had come under since 1996 from the intelligence community and law enforcement agencies. She tracks and questions the national security strategies and assumptions about terrorism and the Muslim world that failed to keep the Nairobi and Dar es Salaam embassies safe in 1998, some of which remain unchallenged today.

Bushnell also exposes the lethal combination of cowardice, callousness, shortsightedness and ineptitude among officials and politicians she dealt with on the matter, both before and after the attack, who routinely swept inconvenient truths under the rug, which led to incompetent decision-making in Washington.

Amb. Bushnell's willingness to speak the truth to the powers that be, both foreign and domestic, shines throughout this memoir. She was truly a modern-day Cassandra, whose counsel was ignored—by State Department seniors, the NSC, the interagency community and even the White House. Worse, her peers rebuked her for her temerity in continuing to urge the department to act to head off the tragedy that came.

In the last section—"So What?"—Bushnell summarizes her own hard-won "lessons learned." She reflects on these lessons from the perspective of the 9/11 terrorist attacks that occurred just three years after the Africa embassy bombings as well as the Benghazi

attack 11 years later—and the after-action reports and recommendations that ensued. (See also Amb. Bushnell's January-February 2017 *FSJ* article on leadership lessons.)

It is an eye-opening view and well worth reading, despite some repetitive passages and a factual error (Republicans retook the Senate in 2014, not 2010). Amb. Bushnell's efforts to gain traction for practical proposals to elevate professional diplomacy in national security strategy and policymaking, and nurture a culture of leadership at the State Department, repeatedly run up against the inertia of business as usual, and worse.

Ever resilient, however, she concludes on an optimistic note, even as she acknowledges the “unfinished business” her generation is leaving.

As she tells her students in the international relations and national security fields: “The list of what needs doing is meaningful and compelling, and it is not too early to start doing something. Go craft smart policies to address Muslim alienation in western countries. Start researching how to address the terror of mass shootings in our own country. Design the reconstruction of the State Department and USAID with clear missions and cultures of leadership. Strengthen the authorities of ambassadors along with the support and development of professional staff.”

“Nothing in history is predetermined,” Amb. Bushnell writes, “and every problem presents a leadership opportunity.” In this book she has shown us what responding to that opportunity can look like. ■

Susan Brady Maitra is senior editor of The Foreign Service Journal.



Populism and Migration

Whiteshift: Populism, Immigration, and the Future of White Majorities

Eric Kaufmann, Abrams Press, 2019, \$35/hardcover, \$12.99/Kindle, 624 pages.

National Populism: The Revolt Against Liberal Democracy

Roger Eatwell and Matthew Goodwin, Pelican, 2018, \$16.95/paperback, \$9.99/Kindle, 384 pages.

REVIEWED BY ANDREW ERICKSON

Not since the 1960s has the West's political zeitgeist shifted so dramatically. Profound realignments in advanced democracies are normalizing historically unprecedented levels of political animosity toward immigrants, refugees and the very dream of multiculturalism. Political norms are shattering.

To cite just one example, Great Britain's impending Brexit from the European Union rejects a half-century of U.K.-E.U. integration. Polls show that discomfort with immigration was a key driver of the Brexit vote. Populist and anti-immigration parties are ascendant in the West, where the long-dominant narrative of the desirability of multiculturalism is being besieged. The consequences for U.S. interests are stark.

The authors of *Whiteshift* and *National Populism* offer their views on these recent

events. Although we may disagree with their conclusions, both books are thought-provoking.

In *Whiteshift*, Eric Kaufmann uses demographic and polling data to make the case that today is a time “in which hegemonic liberal norms ... are being challenged by both populists and centrists, some of whom are trying to install new social norms” (attacking the liberal consensus). He argues that these normative challenges are a sociologically understandable response to the impact of demographic change in the West. Further, he notes, enough voters support challenges to liberalism to make the phenomenon impossible to ignore.

From the left, critics have derided *Whiteshift* as a conservative apologia for white ethno-nationalism. This claim is simplistic. While conceding whites are more privileged than other ethnic groups, Kaufmann argues that inexorable demographic decline has kindled growing white ethnic discomfort that will be reflected in elections. Political trends in democracies cannot simply be derided as “racist”; electorates have a right to democratically express their views about their future.

Kaufmann argues that political harmony may drive a shift away from accepting refugees and humanitarian migrants in favor of immigrants more likely to integrate into host nations' dominant cultures. Such a notion calls into question current U.S. and E.U. migration policies and would privilege elite migrants at the expense of the poor and the oppressed. Just decades away from potential large-scale migration crises associated with global climate change, *Whiteshift* is a thought-provoking, contrarian and, at times, dystopian book.

National Populism's authors wrote after the June 2016 Brexit vote and the 2016 U.S. presidential election; it's a quicker read than *Whiteshift*. Professors Eatwell

Critics have derided *Whiteshift* as a conservative apologia for white ethno-nationalism. This claim is simplistic.

and Goodwin argue that understanding Britain's and America's political upheavals requires seeing what the authors call "the four 'D's" of contemporary politics.

They are "distrust of politicians and institutions"; strong voter fears of the "destruction of the national group's historic identity and established ways of life"; and globalization's relative *deprivation* of traditional middle-class whites and these voters' loss of faith in the future. These drivers, the authors argue, have led, finally, to voter "de-alignment" from traditional party and community affiliations.

De-alignment leaves "political systems

across the West far more volatile, fragmented, and unpredictable than at any point in the history of mass democracy." Stating that we live in a period of "hyper-ethnic change" in the West, the authors note that American suspicion of large-scale immigration has waxed and waned, with 1965's Immigration and Nationalization Act leading to more immigration from non-Western countries.

Ethnic white discomfort with the hyper-ethnic change that has followed (i.e., fundamental immigration-driven ethnic shifts leading to minority-majority transitions in previously white-dominated communities) fuels national popu-

lism. This, the authors conclude, "will have a powerful impact on the politics of many Western countries for many years to come."

At the dawn of the twentieth century, W.E.B. Du Bois predicted that "the problem of the color-line—the relation of the darker to the lighter races of men in Asia and Africa, in America and the islands of the sea"—would continue to bedevil Western politics. A century later, as soaring numbers of migrants seek new homes in the West, these books show that the color line is as strong as ever. ■

Andrew Erickson is a retired Foreign Service officer who served in Europe, Africa, the Middle East and the Americas. A graduate of Brown University and the National War College, he resides in Germany.

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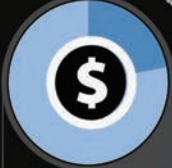
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The Day the (Ambassador to the) Music Died

BY LARRY MANDEL

I first met Elliot Golub in Jordan in 2010. He had brought his five-person musical group, Trio Chicago & Friends, to Amman to perform on behalf of our embassy. Elliot, who apparently couldn't say no when musicians wanted to join in (the reason for "& Friends"), had self-funded the group's travel to Jordan to perform at universities, public sites and the ambassador's residence.

It was neither Elliot's nor the group's first gig overseas. They already had a long history—over 20 years, in fact—of performing at posts around the world, often treating our contacts, as well as students and people across the spectrum of society, to their first sounds of American music. Playing Copland, Gershwin, Ellington and others, they did that very well indeed, making many friends for America.

In getting to know Elliot, I not only discovered that he was founding concertmaster of the Chicago ensemble Music of the Baroque (serving in that capacity from 1972 until 2006), but also that he lived a few blocks from my mother in suburban Chicago. When visiting her, I began to check in with him to the point where we became good friends.



Larry Mandel was a Foreign Service officer from 1984 until 2016. He served overseas in Turkey, Jordan, Indonesia, Israel, Hungary, Japan, the U.K. and Russia. He lives and continues to enjoy music in Washington, D.C.



At a concert in Gaziantep, Turkey, in 2011, Elliot Golub and Suna Avcı Gunther greet local children.



At a public outdoor performance in Al Ahsa, Saudi Arabia in 2018, Elliot Golub does the traditional Saudi Ardha (Sword Dance) with Mayor Adel Al-Mulhem.

It was then my great pleasure to help Elliot and his group find subsequent missions to visit. He would call me up and ask, "Where can you help us go next?" Elliot wasn't looking for money; as I mentioned, he funded the trips himself and just loved performing.

He would go literally anywhere in the world with his group to play and educate people about American music. Their many stops included Saudi Arabia, Chile, China, the Marshall Islands, Thailand,



Tuning up before a performance in 2014. From left: Laura Hamm, Suna Avcı Gunther, Elliot Golub and Marlou Johnson.

Papua New Guinea, Botswana, Djibouti, Australia, Ethiopia and Cuba.

I was pleased that we could invite Elliot and his colleagues to Ankara, my next overseas posting. They loved playing there, and they were loved. The joy Elliot and his fellow musicians took from entertaining on behalf of the U.S. government was apparent and contagious.

In my 32-plus-year career as a Foreign Service officer, I worked with many official ambassadors and Elliot, an unofficial one. This past July, it was with a heavy heart that I learned of his death at age 85. He died peacefully of a heart attack in his Winnetka, Illinois, home, sitting in his favorite chair that overlooked Lake Michigan, in the company of his beloved wife of 57 years, Mona.

In our last phone conversation, a few weeks before he died, Elliot again asked me where I could help them go next. I picture him now playing his beloved violin somewhere up by the Pearly Gates, looking for other heavenly musicians willing to go with him to play at far-off locations. Play sweetly, Elliot, and know we are thinking of you and your music, anticipating that next encore. ■



Right after a winter sunrise, photo enthusiasts come to the Yamuna River bank in New Delhi to capture stunning sunlight and beautiful migratory birds through the smoky haze. The second-largest tributary of the Ganges River and the longest tributary river in India, the Yamuna originates in the Yamunotri Glacier at an elevation of 21,000 feet in the Himalayas, east of the Ganges' point of origin. It flows down from the mountains and into the plains for some 850 miles in parallel to the Ganges, passing through New Delhi before finally merging with the Ganges in Allahabad. Like the Ganges, the Yamuna is highly venerated in Hinduism. Approximately 57 million people depend on its waters, and the river accounts for more than 70 percent of New Delhi's water supply. Also like the Ganges, the Yamuna suffers from heavy pollution. In this photo, a man on his self-made raft collects plastics and recyclable materials for a living. ■

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Yulong Wang is a Foreign Service spouse. His wife, Sarah Ziebell, is a public affairs officer in New Delhi. He has previously lived in Russia, Indonesia and Tibet. This photo was taken with a Nikon D7200, 18-300mm lens.

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