

# THE **FOREIGN SERVICE** JOURNAL

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## TEACHING DIPLOMACY ACROSS THE DIVIDE



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# The Blood Telegram

BY ROBERT J. SILVERMAN

**M**y new year's recommendation to you is *The Blood Telegram: Nixon, Kissinger and a Forgotten Genocide*, by Princeton professor Gary Bass. It tells the story of Archer Blood, a Foreign Service officer who as consul general in Dhaka in 1971 supported his subordinates' dissent cable, knowing that doing so would derail his career, which it did. Spoiler alert: Blood wins in the end, at least in my reading.

The genocide described in the book is the Pakistani military's systematic targeting of the Bengali Hindu minority in East Pakistan in the spring of 1971, during the events that led to the creation of an independent Bangladesh. The military went into villages, rounded up the Hindus, and shot them en masse. About 300,000 Bengalis in total were murdered. The vast majority were Hindus.

The book illuminates U.S. relations in South Asia during the Cold War. Kissinger passed messages to China and arranged Nixon's historic visit to Beijing through Pakistan's military dictator General Yahya Khan, even as the massacres were taking place in East Pakistan. This secret Pakistan channel, India's leadership of the non-aligned movement, Nixon's near pathological dislike of Indian Prime

was U.S. silence about the aforementioned genocide, committed with U.S.-supplied arms.

The dissent cable, drafted by young political officer Scott Butcher during the round-ups and shootings, calls our policy "morally bankrupt" and urges the U.S. government to use its considerable influence with the Pakistani government to stop the genocide. Consul General Blood could have merely authorized the cable to be sent. Instead, he added his endorsement to the cable: "I support the right of the above-named officers to voice their dissent ... I also subscribe to these views." He added pragmatically that the Bengali nationalists were pro-American and likely to prevail and establish an independent Bangladesh, so "one-sided support of the likely loser" was foolish. He didn't know about the Pakistan channel to China.

I am neither an expert on South Asia nor in a position to judge the policy narrative of this book, which assumes that the U.S. could indeed have been effective in slowing down the massacres. I just don't know. But I enjoyed the book for another reason—its contrast between the choices of FSO protagonist Archer Blood and NSC antagonist Henry Kissinger.

Both men were 48 years old in 1971. Archer Blood was a rising political officer with 23 years in the Foreign Service. Recently promoted into the Senior Foreign Service, he was pleased to get Dhaka, where he had served earlier, as his first command position. When the massacres started, his team responded with a steady stream of detailed spot

reports, leading over a period of two weeks to increasing advocacy as the outlines of genocide became clear. "The silence from Washington was deafening," Blood recalled later in an oral history interview.

The cable provoked Kissinger to call Blood "this maniac in Dhaka" and have him recalled. Henry Kissinger's management style as it emerges from the White House tapes is euphemistically known as "managing up." He flattered Nixon and supported Nixon's worst instincts, while suppressing policy options such as those presented by Blood. Kissinger's NSC team appeared quiescent on the matter of Blood's dissent. "One did not want to be perceived as being too much on Blood's side," said one.

In my reading, the result is an indelible stain on Kissinger's reputation for leading a groupthink policy process that worked brilliantly in some cases but failed in others. Bass's book makes the case for East Pakistan as one of the failures.

And Archer Blood? He never got a chief of mission job, with another six years of Kissinger in power after Dhaka. His moral courage at the moment of truth inspired others, and his reputation continues to shine bright with the publication of the Bass book. He also won AFSA's Christian Herter Award for constructive dissent by a senior officer.

Be well, stay safe and keep in touch,

Bob

[Silverman@afsa.org](mailto:Silverman@afsa.org) ■



Minister Indira Gandhi—all come out in the salty Nixon-Kissinger dialogue of the White House tapes. The result

*Robert J. Silverman is the president of the American Foreign Service Association.*



# Crossing the Divide of Mutual Misunderstanding

BY SHAWN DORMAN

Donna Oglesby, a retired FSO and former counselor for the U.S. Information Agency who teaches diplomacy at Eckerd College, offered the spark for this month's focus on teaching diplomacy. I met her at the International Studies Association convention in Toronto last year, and she described her research on how scholars and diplomats teach diplomacy. She found vast differences in their approaches.

Talking with many academics at the convention, I was struck by the gap between academics and practitioners. The work of each group seemed elusive to the other. Could the divide be bridged? Should it be?

While this issue was in production, AFSA was fortunate to have a visit from Professor Abe Lowenthal, who had just published a new volume with Mariano Bertucci, *Scholars, Policymakers, and International Affairs*, that makes the case for more collaboration between scholars and practitioners (see book review, p. 85). In his view, the gap between them is actually widening.

To succeed in academia, scholars must publish works based on theory, methodologies and data that will be read primarily by other scholars. Diplomats, on the other hand, face the tyranny of the

inbox and the immediate, rarely finding space or time for pondering trends and theorizing about international affairs. In bringing scholars and diplomats together, a more complete understanding could emerge.

Our focus on teaching diplomacy begins with "A Practitioner's Song" from Ambassador Barbara Bodine, director of the Institute for the Study of Diplomacy at Georgetown's School of Foreign Service. Speaking to diplomats who venture into the foreign world of academia, she offers guidance on how to use their experience as an effective teaching tool. She offers suggestions for how to bring theory to life and make the study of diplomacy relevant to policymakers and future policymakers alike.

In "Diplomacy Education Unzipped," Donna Oglesby declares that the literature on diplomacy is essentially unknown to most members of the Foreign Service, including those teaching diplomacy. She points out that the study of "foreign policy" has been excluded from the "diplomatic studies paradigm" for decades. U.S. diplomats tend not to accept that distinction.

Oglesby argues that the differences between how academics and practitioners teach diplomacy, and the lack of a common core, raises the key question of whether U.S. diplomacy today is a unique profession with a defined body of knowledge, or rather a practice by a col-

lection of experts with assorted skills.

Robert Dry, a retired FSO and chair of AFSA's Committee on the Foreign Service Profession and Ethics, teaches diplomacy at New York University. His "Diplomacy Works: A Practitioner's Guide to Recent Books" is a survey of the books he considers key to understanding, and teaching, diplomacy.

Paul Sharp, a professor of political science at the University of Minnesota Duluth and co-editor of *The Hague Journal of Diplomacy*, describes the fraught relationship between academics and diplomats. He offers suggestions for improving understanding, but explains why we needn't be *too* concerned.

In this month's Speaking Out column, "Defining Diplomacy," Ambassador Edward Marks cautions that there is much confusion among academics, as well as practitioners, as to what exactly diplomacy is. He spells out the progression from foreign affairs to foreign policy to diplomacy, which he defines as the instrument of communication rather than the message.

Finally, we are pleased to bring you our most boring, yet popular, feature of the year, the annual tax guide for the Foreign Service.

Please let us know what you think about how diplomacy should be taught, what role academics should play in diplomatic practice and what role diplomats should play in the academy. Send your letters to [journal@afsa.org](mailto:journal@afsa.org). ■



Shawn Dorman is the editor of The Foreign Service Journal.

## Accountability for USAID/IG

Recent reports in *The Washington Post* and other media highlight allegations made by auditors working for USAID's inspector general that some audit reports were altered by IG upper management to omit certain findings. These allegations have caused considerable dismay among former USAID IG auditors.

Federal inspectors general have unique disclosure responsibilities under the Inspector General Act of 1976. They report not only to their agency heads, but also to those congressional committees that provide funding for agency operations and exercise oversight.

While omission of inconvenient or sensitive matters from audit reports may well ingratiate inspectors with their agency heads, the practice not only lessens the possibility that corrective actions will be taken by cognizant program managers, but corrodes the morale of audit staff. More importantly, it denies disclosure of such matters to the taxpayers' representatives in Congress.

Worse yet, perhaps, revelations of this sort tend to transform the public's perception of inspectors general from that of alert monitors of agency programs and operations ("junkyard dogs" in the words of Edwin Meese, Ronald Reagan's attorney general) into lap dogs of agency management.

In short, inspectors general have an obligation to report their audit findings in a thoughtful, balanced and objective manner, letting the chips fall where they may. Findings deemed so sensitive that they might harm vital American interests if shared are always subject to classification and special handling in consultation with agency and IG upper management. In no case, however,

should significant findings be omitted or withheld from Congress.

Those USAID/IG officials who allegedly engaged in or condoned the unjustifiable suppression of important audit findings need to be held accountable for their actions.

*Fred Kalhammer*  
USAID Senior FSO/supervisory  
auditor, retired  
Sun City Center, Florida

## How to Combat Inadvertent Judicial Bias

The October *FSJ* article, "Child Custody Issues in Foreign Service Divorces," offers a well-rounded primer on the



unique challenges facing a Foreign Service parent going through a divorce.

Based on my observations litigating family law

cases in Fairfax

County, Virginia, my sole critique is that the article *understated* the adversity often faced by an FS parent seeking to take a child overseas. All else being equal, family law judges tend to prefer custody arrangements with the parent who will remain in what has become a child's hometown—the "non-posted parent."

Unconscious judicial preference for a stationary lifestyle should be combated by a competent legal advocate with the help of a credible scientific expert witness. The applicable Virginia statute (§ 20-124.3) does not expressly address the impact of a custodial parent's plans to regularly relocate on the "best interests" of the child.

Furthermore, the Virginia Court of Appeals has declined to presume that moving will harm a child's relationships, even when moving a "far distance" (*Goodhand v. Kildoo*, 560 SE 2d 463, 2002).

Nonetheless, trial court judges can be a conservative crowd, preferring past acts and known circumstances to unpredictable onward assignments and promises of future good behavior.

For the parent who plans to remain in the Foreign Service and seek custody while living abroad, the importance of hiring a credible child psychologist to testify to the benefits and advantages of a mobile, international lifestyle cannot be overemphasized. The extra money preparing for judicial education on the advantages of growing up overseas will be well spent.

Failing to do so may subject a Foreign Service parent to the discretion of a judge who has inadvertently equated a static lifestyle with a stable one.

*Sam Schmitt, Esq.*  
FS family member  
Vilnius, Lithuania

## Looking Back to the Fall

On Nov. 1, a group of now mostly retired U.S. officials celebrated the 25th anniversary of the fall of the Berlin Wall. This symbolic victory was clearly the result of great teamwork conducted over the years by those in the U.S. and Allied military forces, their respective foreign offices, Western intelligence services, and the underlying dogged, unrelenting spirit of the German citizenry.

Much credit has already been given to various individuals who played different roles in the events leading up to that historic day, with particular importance attached to President Ronald Reagan's "Mr. Gorbachev, Tear Down This Wall"



speech, Mikhail Gorbachev's internal reforms and Pope John Paul II's 1979 visit to Poland.

I had the privilege to be part of the most senior U.S. decision-making team in West Berlin on that memorable day in 1989, and would like to single out two members of that team for special praise: Harry Joseph Gilmore and James "Jim" Alan Williams, the two leaders of the U.S. mission in West Berlin when the wall came down. Gilmore was "U.S. minister" in West Berlin and Williams was his deputy, designated "political adviser."

Both men maintained outstanding professional relationships with the U.S. commandant, the top leadership of the U.S. Army Berlin Brigade, the Central Intelligence Agency and the Defense Intelligence Agency.

Gilmore and Williams were team players, mentors, problem solvers and leaders. They were also great friends of the West Berliners and shared their dream that better days were coming for all who believed in freedom. In the finest tradition of U.S. diplomacy, they served their country with distinction and performed in a remarkable fashion.

Now, as I look back 25 years later, I am still impressed at the teamwork we shared in West Berlin. My experience over the course of a long career is that embassy teams that face daily adversity tend to work together almost like a family. Thanks to Gilmore and Williams, the teamwork we shared in West Berlin stands out as a great, even exceptional, example of leadership in the Foreign Service.

Speaking for the West Berlin leadership team, I offer sincere thanks to these two State Department professionals.  
*[Editor's note: You can read the complete*

*oral histories of these two men in the Oral History Collection at [www.LOC.gov](http://www.LOC.gov)]*

*William F. Rooney  
Senior Service Officer, CIA Directorate  
of Operations, retired  
Bethesda, Maryland*

## Up or Out

As a former director of Foreign Service training assignments, I was gratified to see Robert A. Mosher's comment in the



November letters section regarding my September Speaking Out, "Up or Out" Is Harming American Foreign Policy." He agrees that longer career paths for FSOs should be allowed, especially if those paths could incorporate more extensive mid-career training

similar to that of the military.

The training budget could be increased, though I suspect that the minimal respect promotion panels used to pay such departures from active assignment probably has not changed much over the years, and FSOs may still gamble when they accept longer training breaks in their career trajectories.

But, more training or not, experienced FSOs should, indeed, be granted longer career paths, with minimal worries about "up or out."

In complete contrast, I was saddened by Matt Weiller's letter, "Move Up or Out, Please," in the same issue. He asks for even more "up or out" in the Service, to weed out FSO "poor performers" who lack proper "conduct, suitability and discipline." He adds that the enabling supervisors of the poor performers should suffer career consequences.

Mr. Weiller also claims that there are far too many "dysfunctional and hostile

workplaces" in State and overseas, which endanger our security and diplomacy.

That kind of attitude from an active-duty Senior Foreign Service officer is precisely what moved me to write "A Plea for Greater Teamwork in the Foreign Service," in the December 2013 FSJ.

Mr. Weiller says my comments are "severely dated" and appear to be the "bitter musings of a handful of retired policy officers." I can assure him I am not bitter.

It would be wonderful to hear from more active-duty officers today whether my criticism of "up or out" and my call for more Foreign Service teamwork are dated.

Concerned FSOs, AFSA is *your* organization. Please take the time to express your opinions. You owe that to yourselves and your colleagues.

*George B. Lambrakis  
FSO, retired  
London, England*

## A Little Respect

I support wholeheartedly Larry Cohen's Retiree VP Voice column ("When It Comes to Facility Access for Retirees, Mother State Shows No Love") in the November *Journal*. I am such a retiree, having put in more than 35 years of combined service with both the military and State Department.

My last overseas posting was as consul general in Munich, followed by a stint as an office director in the Bureau of European and Canadian Affairs. I also served as a senior area adviser (for Europe) to the 42nd and 43rd



United Nations General Assemblies.

On leaving government service, I accepted the presidency of a private foreign policy organization in New York City, a job that entailed close liaison with the State Department and other agencies in Washington. What I quickly discovered was that neither my years of service nor my retiree ID card were of any practical use when it came to gaining access to the department.

Although I was not one of the annuitants cited by Cohen, my experience corresponds exactly: it was one of humiliation and a total lack of endorsement. Ultimately, to avoid further embarrassment, I stopped trying. This has been my position for more than 20 years, and, unless the policies and procedures now in place change, I feel disinclined to return.

Sadly, this indifferent attitude toward retirees is not limited to Washington; my recent experience with the consulate general in Amsterdam is yet another example. In June, I emailed both the consul general and the head of the American Citizens Service Unit asking for an appointment to have a document notarized before an onward trip through Europe. No response.

At the State Department's Benelux desk, no one returned my calls or otherwise acknowledged three detailed voice messages. Next, I contacted the AFSA retiree counselor, who later reported that his own follow-up calls to the desk were similarly ignored.

Finally, my son, who lives in the Netherlands, managed to get us an appointment, but we had to change our travel plans to keep it.

My experience at the consulate was eye-opening in a way that went beyond my status as a retiree. Identifying myself as a retired FSO, I was told to join a

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long line of people, mostly visa applicants, seeking admission. We were also informed that cell phones could not be brought inside the building. The Dutch guards could offer no advice as to what everyone was supposed to do with their devices—which are ubiquitous in modern life—and this odd stance triggered reactions ranging from consternation to mirth and outright scorn.

The applicants seemed otherwise perfectly resigned to tolerating an already inconvenient and intrusive battery of security precautions, but this was hardly leaving them with a stellar first impression of America.

Ultimately, my son and I gained entrance. We were informed that there would be a \$100 fee to have two signatures notarized, a process requiring no more than a few moments of a vice consul's time.

In my day, a visiting retiree would have been treated with infinitely more common courtesy throughout a process like this. I am not suggesting that consulate employees, American or local, were derelict in the performance of their formal duties. But overall, I do see a distressing lack of common sense and basic courtesy at work here.

Not only did I feel personally let down when my modest appeal for an appointment was disregarded, but I was professionally unsettled by the seemingly irrational and disproportionate behavior I saw exercised “at the gates” in the name of security.

We have all come to perceive at least some of these measures as unfortunate necessities in geopolitically complex times; but there is also a point where, if unleavened by some modicum of common sense, such measures threaten to alienate the very people whose support we are tasked with cultivating, and all

those otherwise well-disposed towards us and the values we claim to uphold.

All around, I expected a more approachable and genuinely American welcome during these several encounters with the State Department and the consulate general. I was instead confronted by the monolithic and indifferent face of a rulebound authority. I am chagrined that no one inside the very bureau in which I spent the bulk of my career felt moved to return my phone calls.

Larry Cohen's column notes that the U.S. military actively promotes continued interaction between its active-duty and retired personnel. Shouldn't the State Department do the same?

I built my career on a conviction that public service was an unequivocal force for good. But recently, in darker moments, I fear that this may not necessarily be the case, and that my experiences of failure in the daily workings of government at State are not just minor, quotidian anomalies.

I fear they are symptomatic of a more distressing failure on a structural scale, the kind of failure that predictably follows when we neglect the core values that should inform everything we do. Those values have always been (and must remain): courtesy, proportionality and common sense.

*Carroll Brown*  
*Minister Counselor, retired*  
*New York, New York* ■

**Share your thoughts  
about this month's issue.**

**Submit letters  
to the editor.  
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## The World Reacts to Ferguson

**T**he fatal shooting of Michael Brown in Ferguson, Missouri, the grand jury's decision not to indict the white police officer who shot him, and the strong reaction to both in Ferguson and throughout the United States sparked headlines around the world. How are other countries reacting to recent events?

A Nov. 25 *Huffington Post* report summarizing media coverage from a number of outlets noted that Spain's *El Pais* newspaper characterized the Ferguson protests as uniting young blacks who may not have known the victim. "This is not America's or the black community's problem. It is a global problem of people who feel oppressed," the newspaper quoted a source as saying.

In the United Kingdom, *The Telegraph* speculated that the recession, which increased disparities of wealth between the races, was partly to blame for the backlash. "All of this is made worse by a police and judicial system that seems not just imbalanced against blacks but actually designed to put more of them in prison," it wrote in an article on Dec. 4.

The German publication *Spiegel Online* criticized the degree of police reaction in Ferguson by comparing weapons use. In Germany "weapons are the last resort," it wrote. "But in the U.S. police officers make use of them much faster."

Chinese media pointed out the hypocrisy of the United States' human rights position. "The United States assaulted almost 200 countries across the world for their so-called poor human rights records," the Chinese news agency Xinhua wrote in a commentary. "What the United States needs

to do is to concentrate on solving its own problems rather than always pointing fingers at others."

And a story from the Moscow Bureau of the *Associated Press* noted that "Moscow appeared to relish turning the tables on the U.S. after repeated U.S. criticism of Russia's rights records and its policies toward Ukraine."

The article quoted the Russian Foreign Ministry's human rights envoy Konstantin Dolgov's remarks on Russian state television: "The developments in Ferguson and other cities highlight serious challenges to the American society and its stability," he said.

Blogger Allison Sommer Kaplan reflected on comparisons of the Ferguson protests and the clashes between Israelis and Palestinians in the Israeli newspaper *Haaretz*. She wrote: "I do see one major similarity between the Israel-Hamas conflict and Ferguson, as I watch the talking heads on the U.S. media and their counterparts in Tel Aviv and Jerusalem endlessly try to work out how to solve their respective problems during this long, hot summer: dangerously short-term thinking."

—Brittany DeLong, Assistant Editor



Health care workers suit up at the U.S. Navy Mobile Ebola lab in Bong County, Liberia.

## Crowdsourcing Innovation to Combat Ebola

**T**he fight against Ebola in West Africa continues. USAID Administrator Rajiv Shah called the Ebola crisis "one of the toughest challenges we face." Making it even worse is the physical climate: the heat and humidity of the region make the already difficult and dangerous tasks health care workers do every day more arduous.

The personal protective equipment (PPE) suits these workers wear to guard against infection save their lives, but are also often a source of great discomfort.

## Contemporary Quote

“So many kids at the top schools apply for Teach for America. I'd like to talk to those young people and say: Consider government. It's real service too, and you can affect hundreds of millions of people. And if you're working for USAID and the State Department, you can affect billions of people.”

—Chief Technology Officer of the United States Megan Smith, interviewed by The New York Times Magazine, Nov. 2.





## MARKETPLACE

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USAID notes that the maximum amount of time aid workers can stand to wear the suit without a break in the hot climate is 40 minutes, severely limiting the time they can spend caring for the sick and dying.

To find a solution to this problem, USAID joined with the White House Office of Science and Technology, the Centers for Disease Control and Prevention and the Department of Defense to launch "Fighting Ebola: A Grand Challenge for Development."

Part of a program USAID rolled out in 2011, the "Grand Challenge" initiatives are rooted in the agency's belief that science and technology can have "transformational effects," and that engaging the world in the quest for solutions is "critical to instigating breakthrough progress." (There have been five previous Grand Challenges, covering literacy, safe water and maternal health).

The Ebola Grand Challenge (see [www.ebolagrandchallenge.net](http://www.ebolagrandchallenge.net)) seeks to identify ideas that would deliver practical and cost-effective innovations quickly. The prize for the winning ideas is \$5 million in grant money.

The challenge opened for submissions in early October and accepted ideas through a formal grant process and through an open platform. As the open platform website noted, "some of the brightest solutions may be found in the most unthinkable corners." (To view some of the open platform ideas see <https://openideo.com/content/fighting-ebola>.)

USAID reports that 1,250 ideas were submitted: 600 through the open innovation platform and 650 through the formal grant process. Of these, 25 semifinalists were invited to Washington, D.C., on Nov. 14, to pitch their ideas to a panel of judges from USAID, CDC and DoD. Five finalists

were selected from this group to go on to the next stage.

The ideas pitched took novel approaches to the problems of the hot PPE suits. One group of undergraduate students from Columbia University demonstrated a suit that included an internal cooling pouch and an absorbent lining to soak up sweat. Another company group pitched cooling packs—originally intended for athletes—as inserts for the PPE suits.

Wendy Taylor, director of USAID's Center for Accelerating Innovation, told *The Washington Post* that USAID will help selected teams create prototypes and mass-produce the designs quickly.

*USAID announced the winner of the Ebola Grand Challenge as this issue went to press. Look for more in the March edition of "Talking Points."*

—Debra Blome, Associate Editor

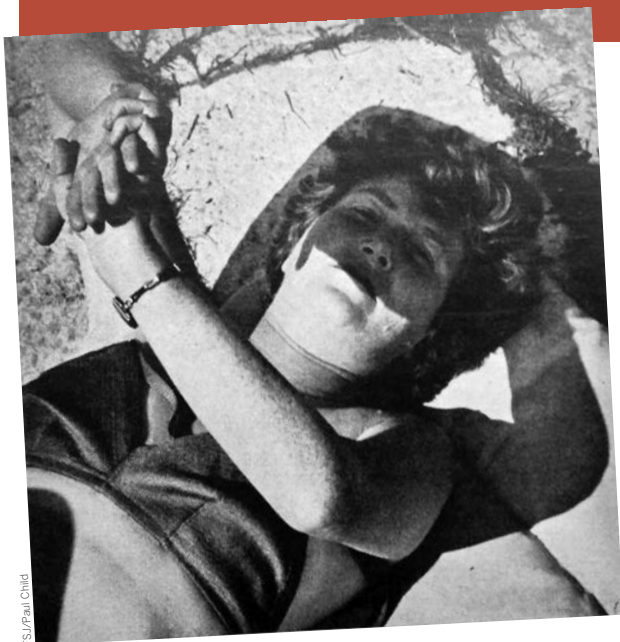
## Reel vs. Real

**N**ov. 4 was not just Election Day, but also the 35th anniversary of the first day of the Iran hostage crisis. To mark the occasion, the Central Intelligence Agency's social media team spent the day sending 20 tweets about "Argo," Ben Affleck's 2012 film about the CIA's rescue of six U.S. diplomats from Tehran during the crisis.

Those tweets are now available in a slideshow contrasting the "Reel Argo" with the "Real Argo" at: [www.bit.ly/Argo\\_factcheck](http://www.bit.ly/Argo_factcheck).

Of course, faithful *FSJ* readers are already well aware of the differences between the fictionalized account and what actually happened. We ran FSO Mark Lijek's first-person account, "Argo': How Hollywood Does History," in the October 2012 issue.

—Steven Alan Honley,  
Contributing Editor



### From the FSJ Archives

This photo of a young Julia Child was one of a number of portraits illustrating the "Behind the Shutter" feature in the January 1965 FSJ. Her husband, then-retired FSO Paul Child, wrote the regular feature, giving tips for taking good photos and showing a few examples of his own

photography. In the January 1965 "Behind the Shutter" column he wrote: "In portraits, try to concentrate on the human (or animal) interest. If it's a person, try to catch your subject before he can get his face set in one of those 'ideal' masks—probably learned in front of his mirror—which inevitably make people stiff, unnatural and self-conscious. Animals and babies are wonderful, but most grown-ups are a pain in the lens."

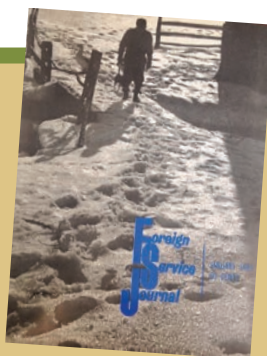
### 50 Years Ago

### The Trouble with the Venetian Blinds

The Department of State building is something of a shock for the homecoming diplomat. Whatever else may be said of our embassy buildings abroad, they offer variety and with a few exceptions they are scaled to the human dimension. The mass, the Spartan angularity, the rectangular maze of this New State require some adjustment. It is not a building that caters to human idiosyncrasy, or even to individuality.

Elevators go when you don't want them to, and refuse to go when you want them to, and snort when you interfere with their plans. Venetian blinds can be tilted down, to see the ground, but not up, to see the sky. (This feature is intended to give a uniform appearance from the outside.) The heating system can be made bearable only by adjusting the locked thermostats with a straightened paper clip (one of the few small triumphs of the spirit over the system). The unfortunate do not have a window to look out of. The fairly fortunate are permitted to stare out on a prison courtyard, with giant floodlights peering down. Only the very fortunate may look out upon the Lincoln Memorial and one of the more spectacular views available in any capital.

—Foreign Service Journal Editorial, January 1965



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## A Snapshot of the 114th Congress

**T**he 114th Congress, in which Republicans control both houses, will be sworn in Jan. 6. The new U.S. Senate is comprised of 54 Republicans, 44 Democrats and two Independents, who caucus with the Democrats. The new composition of the House of Representatives is 246 Republicans, 188 Democrats and one to be determined.

In relation to the work of the foreign affairs agencies, here are some of the most relevant U.S. Senate and House leaders and likely committee chairs:

### U.S. Senate:

- **Majority Leader:** Senator Mitch McConnell (R-Ky.)
- **Foreign Relations:** Senator Bob Corker (R-Tenn.)
- **Homeland Security & Governmental Affairs Committee:** Senator Ron Johnson (R-Wisc.)
- **Appropriations:** Senator Thad Cochran (R-Miss.)
- **Subcommittee on State, Foreign Operations, and Related Programs:** Senator Lindsey Graham (R-S.C.)
- **Commerce, Science and Transportation/Subcommittee on Tourism, Trade and Innovation:** Senator Tim Scott (R-S.C.)



### U.S. House of Representatives:

- **Speaker:** Rep. John Boehner (R-Ohio)
- **Foreign Affairs:** Rep. Ed Royce (R-Calif.)
- **Oversight and Government Reform:** Rep. Jason Chaffetz (R-Utah)
- **Select Committee on Benghazi:** Rep. Trey Gowdy (R-S.C.)
- **Homeland Security:** Rep. Michael McCaul (R-Texas)
- **Appropriations:** Rep. Harold Rogers (R-Ky.)
- **Subcommittee on Agriculture and Rural Development:** Rep. Robert Aderholt (R-Ala.)
- **Subcommittee on Commerce, Justice,**

**and Science:** Rep. John Culberson (R-Texas)

- **Subcommittee on State, Foreign Operations, and Related Programs:** Rep. Kay Granger (R-Texas)

The biggest challenges for the Foreign Service during the 114th Congress will be:

**1. The FY 2016 Budget:** Words like “continuing resolutions” and “cuts” will continue to take center stage. The international affairs budget, in particular, may face additional scrutiny.

**2. Compensation and Benefits Package:** The squeeze on federal employees will be renewed. Legislative proposals focusing on everything from comp time to chained CPI will gain momentum starting in January.

**3. 2016 Presidential Election:** Given former Secretary of State Hillary Rodham Clinton’s standing as the virtual Democratic frontrunner, and the prospect of Senators Ted Cruz (R-Texas), Rand Paul (R-Ky.), and Marco Rubio (R-Fla.) running for the GOP nomination, foreign affairs will most likely play a bigger role than it has in recent elections.

AFSA members, please let the advocacy team know what issues you care most about and how to better serve you by sending an email to [advocacy@afsa.org](mailto:advocacy@afsa.org).

—Janice Weiner, AFSA Policy Adviser

## U.S. Diplomacy Center Previews “Faces of Diplomacy” Exhibit

**I**n the nation’s capital we are spoiled for choice when it comes to museums. From art history to science to culture, we have exhibits of every make and model. So it’s apt that in a city filled with museums we will soon have one dedicated to the men and women who devote their

lives to U.S. diplomacy.

The United State Diplomacy Center, currently under construction at the 21st Street entrance of the Department of State, and due to open in 2016 (see *FSJ* October), is the first museum committed to shining a much-needed spotlight on the hows and whys of diplomacy.

Until the museum is completed, the U.S. Diplomacy Center is maintaining

exhibition space within the Harry S Truman building, where it recently gave a sneak preview of the kinds of exhibits to come. “The Faces of Diplomacy,” held in November (and which will be included in the center when it opens), profiled a few of America’s diplomats and others involved in diplomacy in a series of nearly life-sized photos accompanied by personal anecdotes.

## SITE OF THE MONTH: *Charity Navigator*

The start of a new year is a good time to reassess our charitable giving. With the thousands of charities operating in the United States, the task of choosing a worthy cause can be daunting. Most people don't have time or inclination to scour through a charity's website to find overhead numbers, expense breakdowns, annual revenue or CEO salaries—yet we value charities that are transparent and clear about their mission and how they plan to accomplish it.

There are thousands of small charities scattered throughout the country. Is anyone keeping track of their performance? Since 2001, *Charity Navigator* ([Charitynavigator.org](http://Charitynavigator.org)) has been keeping donors, and potential donors, informed. The site aims to “advance a more efficient and responsive philanthropic marketplace, in which givers and the charities they support work in tandem.”

The site evaluates a charity's performance with a rating system that examines the charity's financial health, accountability and transparency. The ratings evaluate efficiency with donor funds, sustainability of the program and service over time, and how open it is with information. These ratings can help people make informed decisions about donating to all types of charities, large and small and in numerous categories. The Top 10 lists include “10 Charities Expanding in a Hurry,” “10 Charities Worth Watching,” and “10 Charities in Deep Financial Trouble.”

*Charity Navigator* only evaluates organizations that are tax-exempt under Section 501(c)(3) of the Internal Revenue Code, have been in existence for at least seven years and are



based in the United States. The site assesses a charity's financial information based on its IRS 990 forms. A charity will receive a high score (4 out of 4 stars) if it is deemed financially efficient, spends less money to raise more and devotes the majority of its

spending to the programs and services it exists to provide.

The site also assesses transparency, which it defines as “an obligation or willingness by a charity to explain its actions to its stakeholders and publish critical data about the organization,” by performing a comprehensive review of the charity's website and IRS forms. Charities that are completely transparent are more likely to act with integrity and strive to accomplish their mission and are unlikely to mismanage donations or engage in other unethical practices.

Last year alone, the site was visited approximately seven million times. As a tool for those interested in the nonprofit sector, this website is an excellent resource. The comprehensive analyses of a multitude of charities the site provides allow donors to select worthy causes. Through *Charity Navigator's* work, millions of people can funnel their donations to high-performing, reputable organizations and thereby help to solve the world's most pressing problems more quickly.

—Trevor Smith, FSJ Editorial Intern

The U.S. Diplomacy Center's aim is to highlight the achievements and role of the Foreign Service, Civil Service and other colleagues contributing to this work, as well as promote understanding of the challenges they face.

The November exhibit invited visitors to take an in-depth look at how U.S. diplomacy affects our everyday lives. We learn about individuals, what they do and how they work to move U.S. foreign policy forward.

The exhibit adds a human aspect to what is, for many Americans, a mysterious world. ■

—Lindsey Botts, Labor Management Executive Assistant



“Faces of Diplomacy” Exhibit at the State Department.

# Defining Diplomacy

BY EDWARD MARKS

Most countries provide professional education for their diplomats, and some operate establishments specifically for that purpose. Few of us would claim that the Department of State or any other U.S. foreign affairs agency provides the equivalent with any degree of seriousness or comprehensiveness. Our Foreign Service Institute, for all its virtues (and our fond memories), is essentially a training, not an educational, institution.

However, there are signs of growing interest in diplomacy education, expressed, for example, in a paper the American Foreign Service Association recently submitted to the Quadrennial Diplomacy and Development Review drafting team. If that proposal is pursued, we may yet see a serious program of professional education put in place for America's professional diplomats.

First, though, we need to reach agreement on what diplomacy means. There is much confusion about the concept—and not just among lay people, but among its practitioners, as well. Part of this derives from the fact that English is a tricky language, requiring a good deal of care to ensure that what is said is what is meant. Even at the level of single words, misunderstandings can occur, given that words often have multiple meanings.

A good example is the word “diplo-

macy”—which, in addition to its formal reference to a specialized activity of governments, has come to denote personal qualities involving pleasing manners. Even in the context of its original meaning, there is much confusion among several terms that many people erroneously believe are synonyms for diplomacy: e.g., foreign affairs and foreign policy.

Using some fairly standard dictionary definitions, we find that “foreign affairs” means “matters having to do with international relations and with the interests of the home country in foreign countries.” The term “foreign policy” introduces a further distinction: it means “the diplomatic policy of a nation in its interactions with other countries.”

In contrast, diplomacy is generally defined as “the art and practice of conducting negotiations between nations” in order to implement those policies and pursue those interests.

## A Semantic Overlap

This gives us a nice progression from the general subject (foreign affairs) to a specific manifestation (foreign policy), and on to implementation (diplomacy). But that leads, in turn, to another potential source of confusion.

In the policy context, each government has its own diplomacy. But in the operational sense, diplomacy also refers

to the conduct of business between and among governments, carried out through bureaucratic institutions and processes. Or, to put it another way, the former is loosely intended to refer to a country's “foreign policy,” while the latter concerns the activity of a country's foreign policy bureaucracy.

Obviously, these terms and what they represent overlap. The continuing and inevitably intimate relationship between foreign policy and diplomacy—between the objective and the means—ensures they can never be completely separated, at least in the mind of the general public. But there are fundamental differences between them.

For instance, most Americans would probably agree that U.S. foreign policy includes support for democratic governments; consequently, it is appropriate for our diplomats to pursue activities that support democratic governments. Yet that objective is a comparatively recent addition to our foreign policy structure.

For most of our history, John Quincy Adams' 1821 declaration that the United States “does not go abroad in search of monsters to destroy” was a more accurate representation of American diplomacy. In any case, as we know, many other governments do not include democracy promotion in their foreign policy; nor do their diplomats pursue such activities or work with those who do.

Diplomacy is the instrument of communication, *not* the message communicated. George Kennan, who thought about his profession as seriously as he did about foreign affairs and foreign policy, noted: “This is the classic function of diplomacy: to effect the communications between one's own government and other governments or individuals abroad, and to do this with maximum accuracy, imagination, tact and good sense.”



*Edward Marks spent 40 years in the U.S. Foreign Service, including an assignment as ambassador to Guinea-Bissau and Cape Verde. A senior mentor at various military institutions, Ambassador Marks currently serves as a retiree representative on the AFSA Governing Board, a member of the American Diplomacy board and a Distinguished Senior Fellow at George Mason University.*



**Diplomacy is the instrument of communication, not the message communicated.**

### Diplomacy's Two Forms

In other words, the medium is not the message—though the widespread confusion between the two obliged the legendary academic student of international politics, Hans Morgenthau, to comment that there was a common “confusion of functions between the foreign office and the diplomatic representative.”

But the medium does have a corporal form; in fact, it has two. The first is the activity itself, when officials—from presidents to third secretaries and the occasional “special representative”—practice diplomacy: that is, conduct official communications between governments.

The second form is an established institution. Even the Internet operating through the cloud requires some form of instrument at either end of a conversation. For diplomacy, that physical instrument is a foreign service (the diplomatic and consular personnel of a country's foreign office) such as the United States Foreign Service (a government service of diplomatic and consular staff established by law as part of the executive branch.)

This corps of officials is an instrument of the government, one of the tools in the foreign policy toolbox—not an independent force. Most countries try to organize that instrument in the form of a professional cadre, recruited, trained and educated for their task as representatives

AFSA 2015

# DISSENT AWARD NOMINATIONS

Encourage independent thinking in the Foreign Service by nominating a colleague or yourself for an AFSA constructive dissent award. **The deadline is February 28, 2015.** Recipients will be honored at a ceremony in June in the Benjamin Franklin Diplomatic Room. The dissent may concern foreign policy or management issues, and does not have to be in the form of a dissent cable.

#### The four monetary awards are:

- The F. Allen “Tex” Harris Award for a Foreign Service specialist
- The W. Averell Harriman Award for an entry-level officer (FS 7-FS 4)
- The William R. Rivkin Award for a mid-level Foreign Service officer (FS 3- FS 1)
- The Christian A. Herter Award for a Senior Foreign Service officer (FS OC-FE CA)

#### Past recipients include:

USAID officer Diana Putman, the current USAID mission director to the Democratic Republic of the Congo, is the 2010 Rivkin Award recipient. She was recognized for challenging U.S. Africa Command over proposed interventions in the area of sexual and gender-based violence. Her view prevailed.

Archer Blood, consul general in Dhaka in 1971, won the Christian Herter Award for dissenting on U.S. policy towards Pakistan during the war that led to Bangladesh's independence. His dissent is the subject of an award-winning bestseller, *The Blood Telegram*, published in 2013.



Diana Putman

Information on nomination procedures and a list of previous dissent winners can be found at [www.afsa.org/awards](http://www.afsa.org/awards). Please direct any questions to Ms. Perri Green, Coordinator for Special Awards and Outreach, at [green@afsa.org](mailto:green@afsa.org) or (202) 719-9700.

and interpreters of their country's foreign policy.

However, diplomacy has never been a popular, or even understood, activity in most Western countries. So, after the remarkable performance of Benjamin Franklin in Paris, the United States proceeded to conduct its diplomacy for more than a century via an ad hoc mixture of personalities chosen largely by means of the political tradition of the "spoils system."

Fortunately, by the early 20th century Americans came to accept the idea of a professional Foreign Service as important to the country's independent existence. That awareness produced the Rogers Act of 1924, which created the professional

Foreign Service of the United States. Changes and reforms were introduced over the rest of the century as the country moved from its traditional policy of hemispheric isolationism to world leadership.


## A Clear Definition

The current organization and mission of the Foreign Service were mandated by Congress in the Foreign Service Act of 1980, which states:




"A career Foreign Service, characterized by excellence and professionalism, is essential in the national interest to assist the president and the Secretary of State in conducting the foreign affairs of the United States.

"The scope and complexity of the foreign affairs of the nation have heightened the need for a professional Foreign Service that will serve the foreign affairs interests of the United States in an integrated fashion and that can provide a resource of qualified personnel for the president, the Secretary of State and the agencies concerned with foreign affairs."

So perhaps the problem of definition is not really that difficult, after all. We only need to turn to the relevant legislation, and listen to our elected leaders. If Congress understands that the business of the Foreign Service is to conduct diplomacy on behalf of the United States, and to serve the nation's foreign affairs interests, why can't everyone else? ■



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# Teaching *Diplomacy As Process (Not Event)* A Practitioner's Song

**Diplomacy is a collaborative process over time involving a number of players with differing perspectives and strengths. How does a practitioner convey that in a classroom?**

BY BARBARA K. BODINE

**T**he story goes that when Ambassador Robert Gallucci, negotiator extraordinaire, became dean of the Edmund A. Walsh School of Foreign Service at Georgetown University, he quipped: “I now have to teach in theory what I have done in practice.”

That is the challenge all diplomats face as we move to the academic world in some version of that anomalous position, the practitioner-in-residence. We are not tenure-track faculty, even those of us with Ph.Ds. Nor are we hired for our writings on the applicability of neorealism vs. liberal institutionalism to the development of U.S. policy toward Southern Cone states in the late 1870s. Rather, we are hired because of our work to implement U.S. policy toward Southern Cone states in the 1970s and beyond.

Most of us are area specialists, a highly endangered species in the academic world, and many of us understand program management, an exotic if nearly mythological creature outside of business schools. Yet we are not hired in spite of these differences but (at least at the smarter institutions) because of them.

We are not unlike many of the political appointees with whom we worked during our careers. Having attained a measure of success in one field, we have to navigate a wholly new environment—language, culture, histories, hierarchies, rivalries—and add value to the process. My empathy for political

appointees has gone up immeasurably since I moved over to the academic world more than a decade ago.

The degree to which we are welcomed varies by institution and our ability to adapt to, but not compete with, the established order. The rap on practitioners, and the trap that we fall into—beyond our naiveté that an AMB is roughly equivalent to a Ph.D.—is that we are just storytellers. We are an oral history tribe; indeed, Stu Kennedy has made a career of collecting our stories for posterity.

We *are* our stories. Used properly, they effectively illustrate a narrative and bring theory down to practice. It is how we define ourselves and frame events. We are also, we must admit, susceptible to the blandishments of our young charges—who either encourage us in our worst habit because they enjoy the story, or

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## **Neither mastery of data manipulation nor the current “ism”—particularly when divorced from history or regional context—gets to the day-to-day dynamics of diplomacy.**

they have figured out it is a great way to get us off topic and away from the syllabus, at least for a while. How wonderful it is to have a fresh crop every year for whom our stories are new and exciting, if increasingly out of the misty past.

### **The Academic Approach**

To understand where the practitioner fits in, we need to understand the world in which we now live. Scholars of political science and international relations chronically lament that the very nature of their disciplines has disconnected them from, and made them irrelevant to, the practice of policymaking and implementation. They cite the dearth of academics from those disciplines recruited by presidential administrations compared to their colleagues in economics. On the one hand, there is increased emphasis on quantitative analysis and grand strategies and, on the other, the demise of diplomatic history and area studies. These trends are self-reinforcing as tenured faculty work with, hire and promote the next generation of like-minded scholars.

Diplomatic history, notably as practiced by the late Ernst May of Harvard, can illuminate patterns and lessons that can be usefully and pragmatically applied going forward. Regrettably, diplomatic history has fallen out of favor in the academic world, perhaps in part a reflection of the ahistorical nature of Americans. Few new diplomatic historians are being produced, hired and tenured, as history is increasingly written by journalists. Similarly, regional studies departments and contemporary area studies majors have been eclipsed by anthropologists and linguists. L. Carl Brown of Princeton's Near East Studies Department has voiced a lament similar to Professor May's. Even qualitative analysts feel embattled.

Diplomatic historians and regionalists have been replaced by the theoreticians of international relations, whose warring factions compete for space and their share of footnotes in each other's works and the works of graduate students. Quantitative analysis seeks to apply the standards and rigors of science to the study of politics, to reduce events to numbers, matrices and problem sets. Quantitative analysis excludes that which cannot

be quantified. Like Sgt. Friday of “Dragnet,” these theoreticians work assiduously to stick with “just the facts, ma’am.”

One top senior's thesis I read used regression analysis to predict the length of stay of enemy combatants at Guantanamo. The research was impressive, the manipulation of the data masterful, and the quality of analysis superb and worthy of recognition. Yet it took 125 pages of data to conclude that detainees from friendly countries are released sooner than those from less friendly countries, irrespective of threat indices, and that those from Yemen have close to no chance of ever seeing Sanaa again.

The study may help inform the debate on release policies, but it was noticeably devoid of policy recommendations itself. Given the ideological polemics that have surrounded the question of Guantanamo, this is commendable and may enhance the credibility of the thesis, but it deferred to others to determine policy options. A tool dependent on access to credible and sufficient data, and sufficient time for analysis, is of marginal direct utility to the policymaker.

Grand strategies seek determinative patterns to events. Several years ago, John Waterbury, a Princeton University professor, reviewed, with a large measure of humor, the waves of theoretical fashions and fads he had watched sweep over academia during his career. Each of these approaches had merit, and a solid understanding of each provides useful skills and frameworks in assessing policy options. If storytelling is all trees, these are critical efforts to understand the forest. However, neither mastery of data manipulation nor the current “ism”—particularly when divorced from history or regional context—gets to the day-to-day dynamics of diplomacy, of the decision-making and decision-implementing processes, or the skills necessary to be effective. They are of limited utility in framing options for Afghanistan, developing an assistance strategy or prepping the Seventh Floor for a deputies' meeting.

### **Teaching Across the Divide**

There is a lack of clarity whether diplomacy is the process, the tool or means of the process, or discreet events. The term is used interchangeably with foreign policy, international affairs, global





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## There is a lack of clarity whether diplomacy is the process, the tool or means of the process, or discreet events.

affairs, etc. Or, equally damaging, it is dismissed as little more than good manners and a pleasing, if overly cautious, personal style.

For this article, I will take “diplomacy” to mean the process of the formulation and the implementation through official channels of the broad elements of national strategic policy, to include public diplomacy, development policy and security strategy as much as core diplomacy and, in some circumstances, track-two diplomacy. It includes the following, in unequal parts:

- History and an appreciation of the “persistence of political culture”
- Area and cultural competence, including language skills
- Economics, at least familiarity with political economy and macro-economics
- Governmental structure and process of policy and decision-making
- Organizational management: resources and personnel
- Leadership: the skills to manipulate processes, both formal and informal, to attain goals
- Writing and presentation skills.

Few practitioners are competent to effectively teach all those components with equal depth and sophistication. Fortunately, we don’t have to. Scholars—the faculty—devote their careers to these disciplines, and students have the option to craft interdisciplinary courses of study.

A senior professor of American foreign policy at West Point once described “diplomacy” to his cadets as the negotiation of bilateral and multilateral treaties. Not inaccurate, but certainly insufficient. Ross Perot, in his presidential run, suggested that diplomats be replaced by fax machines—as though we were no more than the sum of our demarches. Finally, emphasis on crisis management reinforces the perception of diplomacy as events.

For practitioners, active and emeriti, as well as the think-tank crowd, simulations, games, role-playing and tabletop exercises can be invaluable mechanisms to work through issues. I am a strong supporter of tabletop exercises/simulations, and moved the State Department’s crisis management exercises to the Foreign Service Institute when the Diplomatic Security Bureau opted to shut them down in the early 1990s. In 2008, there was

a cottage industry of “Day After” exercises in the run-up to the change in administrations that did seem to inform policy choices. But to be useful, they must assume a certain level of familiarity with the issues and understanding of the dynamics.

Since students rarely have either, such exercises are of limited use in a classroom setting or for the apprentice practitioner. “Games” that work well at war colleges or at defense consulting firms like SAIC or Booz Allen Hamilton, on a college campus devolve rather rapidly into theater, and too often into high camp. With little frame of reference, students take on what they believe is the persona of a Cabinet secretary or a foreign leader based on their perception of a current incumbent. As demarches, press releases and meetings fly back and forth, orchestrated with a deus-ex-machina quality by Control, a “gotcha” quality can creep in, at times egged on by team advisers. Bright students become policy divas. In an unscientific survey of graduate students, the consensus was that the games were “fun but silly.” Few saw them as constructive lessons on the practice of diplomacy.

Simulations reinforce the notion of diplomacy as an event or series of events, of crisis management or negotiations done in a matter of days. They leave students with an unrealistic expectation that diplomacy is fast-paced, the clever resolution of a crisis or conclusion of a short-fuse negotiation, rather than an appreciation of the incremental process that precedes and follows crises or negotiations, and inevitable disappointment when they become practitioners. Diplomacy is to simulations as the practice of medicine is to the TV show “ER.”

Finally, simulations place an emphasis on the what or the how of diplomatic practice at the expense of the why. The skill set the next generation of policy players needs is to understand the role of public diplomacy, or of public affairs, not practice in drafting a press release. Practitioners-in-residence need not replicate the role of FSI or the apprentice stage in their new careers.

The value-added of the practitioner-in-residence is to work with students to understand how the parts can successfully be brought together to make and implement a policy, to bridge the divide between theory/research and policymaking/implementation above the level of the Gullah storyteller.

The substantive components—history, economics, political



## **A tool dependent on access to credible and sufficient data, and sufficient time for analysis, is of marginal direct utility to the policymaker.**

theory (yes, an understanding of theory is important), language and culture—are important, and the practitioner must be able to incorporate these, albeit at a level different than that of the academic. The practitioner, however, can also focus on the core intellectual components—the ability to identify critical issues, to synthesize information and data, to extrapolate from history and precedent to craft policy—to understand the decision-making process and players. The role of the practitioner-in-residence is not to replace, but to complement, the academic.

### **Two Approaches to the Bridge**

There are two approaches that can bridge the divide between theory and games: case studies and policy task forces/workshops (known as PTF/PWS). Both can be used to convey the importance of historical context, contain a measure of structure and patterns drawn from academic theory, and include important lessons on the complex development of policy and the limitations of its implementation.

Case studies elevate the value of the storyteller-in-residence beyond their personal experiences. The case study approach has proved effective in other graduate professional schools, including law and business, and is equally applicable and effective in teaching the practice of diplomacy. Georgetown University's Institute for the Study of Diplomacy, for example, developed over several decades about 300 case studies covering decades of post-World War II diplomatic history that can be used either as core or supplemental readings. A course on "Invention: Limitations and Opportunities" can draw on studies of Somalia, the Philippines, the Shah's Iran and the Balkans.

The better case studies include sufficient back story to provide necessary, but not burdensome, context, as well as footnotes for further research. The great ones include teaching notes.

### **Task Forces/Workshops: Lessons in Leadership, Collaboration and Policy Trade-offs**

To underscore this notion of process, and to borrow from Marc Grossman's introduction to *The Embassy of the Future* (Center for Strategic and International Studies, 2007), diplomacy is not the result of a single person's actions or work, even a

"Great Man" or an ambassador. It is a collaborative process over time involving a number of players with differing perspectives and strengths.

How does a practitioner convey that in a classroom? One model, used successfully for years at the Woodrow Wilson School, is based on policy task forces/workshops. This format reinforces core competencies, the concept of process, the role of collaboration and the importance of strong writing skills, and plays to the strengths and unique perspective of the practitioner-in-residence. The format provides a framework that is more practical than the conventional academic approach and more conceptual, structural and historical than simulations or even case studies. It is also considerably more labor-intensive than conventional teaching.

The objective is not to create one-semester experts on a specific region or issue, but to convey the sense of diplomacy as an incremental process, the complexity of factors that go into policy formulation and implementation, the give-and-take of competing interagency interpretations of national policy objectives, the need to understand "the persistence of political culture" and familiarization with policy writing (as opposed to academic writing)—all lessons that can be applied to other policies, other regions and in any department or agency.

Each PTF/PWS focuses on a single major, ongoing policy issue: e.g., childhood obesity, rogue states, rebalancing U.S. policy in the Arab Gulf states, or crafting a comprehensive strategy for fragile states. Students focus on one facet of the issue, and produce both a two-page executive summary and a 25-page policy paper. The former exposes students to the rigors of the short-version paper; the latter reinforces the rigors of academic research and analysis. Because this is an academic environment, far more space is devoted to history and strategic context than would be found in a proper policy paper, even one issued by a think-tank.

Papers must reflect an understanding of the broad policy issue and its relevance for U.S. national interests; how the elements fit into the broader policy issue, current policy and programs; and recommendations for new policy and programs (strategic and programmatic). In the process, students must

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develop a sufficient appreciation of the historical context of the bilateral or regional issue and the domestic political and economic dynamics, as well as an understanding of the policy players; the differences between a policy, a strategy, an initiative, a program and a project; and how they relate to each other.

A critical component of this format, and one that plays directly to a diplomat's expertise and the student's wonkish aspirations, is the requirement to produce a joint policy report that incorporates the class's collective judgment on the issue, relevant background and context, and a single set of recommendations that must be presented and defended before a panel of senior (albeit often retired) practitioners.

### Not for the Drive-by Practitioner-in-Residence

These exercises are admittedly far more labor intensive than regular lecture-based teaching. Both the individual and joint papers demand considerable guidance and editing as the students shift from pure research/academic writing to policy analysis and recommendations. They grapple not only with unfamiliar subject matter, but new writing formats (framing a three-sentence "issue for decision" is a particular challenge). They come to understand the role of both history and policy organizations and players, and learn to develop complex, inter-related and innovative, yet practical, recommendations.

Most students start out with policy from 30,000 feet: "The president needs to give a speech." They have a very declaratory and directive approach to diplomacy and international relations. Initial recommendations often begin: "The United States must tell the host government to do..." and end with a coercive diplomacy approach of "... or else."

As the semester works toward the joint report, there is an increased appreciation of the responsibility of each participant to the collective product. They face the reality of negotiated policy, of balancing between competing or conflicting recommendations or even assessments of core issues to produce a coherent report. The satisfaction each experiences with the final, collaborative first-rate joint report and its successful presentation to a panel of practitioners is exceeded only by that of their director.

Then again, if diplomacy is a long, iterative process, an art to be refined and a skill to be honed with practice, we cannot expect to competently and credibly teach diplomacy with any less commitment. We are our stories—but we are more than a collection of our stories. ■

# DIPLOMACY EDUCATION

## Unzipped

**Who is a diplomat in today's world? The differences between the academic's and the practitioner's approach to teaching diplomacy point to some answers.**

BY DONNA MARIE OGLESBY

**T**he concept of diplomacy has long lacked cultural resonance in the United States. The late R. Smith Simpson, a career U.S. Foreign Service officer credited with stimulating the creation of the Georgetown Institute for the Study of Diplomacy in 1978, was said to have been an “absolute pit bull” on making the intricacies of diplomacy a key component of the curriculum. He left ISD in 1992, when the curriculum strayed from that objective. “Diplomacy was a neglected field. It wasn’t sexy,” Dean Peter Krogh noted at the time of Simpson’s death. “Everyone wants to talk about what we want to do in the world; not a lot want to talk about how to get it done.” That is still true today.

Diplomacy has been squeezed out of the course catalogs in American higher education by the two master frames driving American views of how to deal with the world: defend against it, or transform it. Americans are far less interested in managing international relations through perpetual systemic engagement. They want either to avoid or to fix problems, transcending the never-ending compromises of diplomacy, which seem to many both old-world and old-hat.

Yet, while they are few and far between, courses on diplomacy do exist. After an extensive search in 2013, I found and reviewed more than 60 diplomacy course syllabi, with a subset on public diplomacy, and conducted lengthy interviews with a majority of the teachers. The courses are found occasionally in

departments of international relations and history, most often in member institutions of the Association of Professional Schools of International Affairs, and they are taught by both academics and practitioners (mostly retired FSOs). Course content varies widely, based on the personal experiences and the disciplines of those teaching. I could not find a common core.

Whereas academics traditionally teach an understanding of what the international institution of diplomacy is and how it changes over time, FSOs emphasize how American foreign affairs institutions are organized, how foreign policy is determined and conducted, and what the specifics of foreign policies are. But beyond that distinction, I found greater patterns of difference between courses designed by academics and those created by American practitioners than would be expected from a close reading of the literature on the gap between international

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## **Diplomacy has been squeezed out of the course catalogs in American higher education by the two master frames driving American views of how to deal with the world: defend against it, or transform it.**

relations theory and practice. Something else is going on here that we need to understand. What the two communities teach in terms of skills and procedures, as well as the beliefs that inform them, the values that sustain them and the theories that lie behind them, differ significantly.

These differences get at the heart of whether diplomacy in the United States is a unique profession with a defined body of knowledge and skill set, or merely a practice by a collection of experts with assorted technical knowledge and skills. Who is a diplomat in today's world? The U.S. Foreign Service has a vital stake in the answer to that question, given the displacement of the State Department as the central axis of official American external relations and the encroachment by politically well-connected Americans, intent on replacing members of the career Service.

### **The American Fabric**

The main institutions of American society do not support diplomacy as either a professional practice or a field of study. Many Americans have no idea what diplomats do. Others think diplomacy is no longer necessary because the fabric of global society is one felted whole, so densely matted together that sovereign boundaries are irrelevant and slight national differences can be managed. They see no need for a corps of uniquely skilled professionals, deeply knowledgeable in the histories, languages and cultures of foreign societies.

In this rosy vision of flattened, fibrous, global unity, where there is no "foreign," foreign policy is optional, and diplomats are unnecessary. Instead, private individuals, with technical knowledge, functional expertise and global reach, network to fix the problems created by rapid compression into global oneness. Readily available in civil society, such expertise is best assembled around issues of concern to bind societies one to another apolitically, without distrusted national governments getting in the way. The corresponding academic track in APSIA schools is human development, including public health.

By contrast, those Americans who view today's newly felted world as a pathological mess want protection from it, not

engagement with it. They want military and intelligence options to prevent, shape and win conflicts that they believe threaten the continued existence of the exceptional American way of life and the global order that sustains it. The corresponding academic track in international policy schools is security studies, including intelligence.

Academic and societal embrace of the boundary-less term "global," instead of the boundary-crossing term "international," erases the very idea of the "foreign." Without that concept, interdisciplinary area studies—the focus on the particularities of regions and nations with palpable histories, cultures, languages and concerns of their own—diminish in value. As a subject of study, diplomacy, which provides understanding of the political means needed to achieve any foreign policy goal, given those complex external realities, is barely visible. Nor is there much demand for it.

In the American system of higher education, students are consumers who choose to fill the seats in the classrooms. Research shows that members of the millennial generation, shaped by 9/11 and the 2008 recession, are hyper-individualistic, identify as global citizens, and distrust government and large bureaucratic institutions. These characteristics drive their career goals and, therefore, course preferences. Their identity as global citizens also might explain why courses on public diplomacy, in which they imagine themselves as technologically empowered individual actors, are more subscribed than those on diplomacy itself.

Over the last decade, while diplomacy has been sidelined, foreign affairs job growth in America has been in the intelligence/security sector and in nongovernmental human rights and development organizations. American students who are inclined toward international affairs want to acquire the skills and concepts that will qualify them to get the jobs that American society has on offer. International students, by contrast, many of whom are already diplomats or aspire to become diplomats for their countries, do want to study the field. They comprise, on average, a third of students in all the classes I surveyed. Diplomacy course instructors also frequently mention the subsidized



Donna Oglesby

Eckerd College students in Donna Oglesby's spring 2012 "Diplomacy and International Relations" course work in country teams playing the online international relations game called "Simulating Statecraft."

Pickering-Rangel Fellows as faithful enrollees. Without the presence of these two groups in the classrooms, the seats would go empty. Courses taught by FSOs do attract other students, not because of their interest in diplomacy, but because of their thirst for the practical skills and knowledge required to operate in the international policy sphere, inside or outside of government.

### Practitioner Course Design

Courses on diplomacy designed by American practitioners exemplify statecraft. They are usually extended case studies grounded in the soil of the particular: "Yemen: Crafting a

Comprehensive Strategy for a Fragile State" or "U.S. Borders and Borderlands." Even when the course titles carry the more generic "Creating a 21st-Century Diplomacy" or "Doing Diplomacy," the focus is on the bilateral and multilateral relationships represented by human actors (their motivations, personalities and interests), as well as on case-specific foreign policy decision-making and implementation.

True to the society from which they come, American diplomats focus their courses on the foreign policy problems that the United States confronts. They pay attention to the institutional and operational infrastructure that must be managed, as well

## Doing diplomacy for decades prior to teaching gives the practitioner a background understanding of the subject, guiding them to insights and intuitions about the realities of the practice.

as the formulation of sound policy advice at home and effective representation abroad. As heirs of George F. Kennan, American diplomats do not experience diplomacy in a compartment by itself. Kennan explained why in *Measures Short Of War*: “The stuff of diplomacy is in the entire fabric of our foreign relations with other countries, and it embraces every phase of national power and every phase of national dealing.” Today, we are accustomed to seeing our national diplomatic system range across departments responsible for diplomacy, development and defense.

Some FSOs teaching diplomacy write their own case studies and simulations. Others make use of the rich collection developed and made available by the Harvard Kennedy School Case Program and the Georgetown Institute for the Study of Diplomacy. Although there are wonderful case studies on negotiations, international bargaining and conflict resolution, the vast majority center on the domestic struggle to determine American foreign policy, rather than the means by which policies, once determined, are carried out. So again, the techniques of diplomacy as an instrument of statecraft receive minor attention.

The diplomat, however, writes a syllabus with the wisdom gained and hands dirtied from hard work in the field. Knowledge does not precede and is not separable from practice; it is created by it. Doing diplomacy for decades prior to teaching gives the practitioner a background understanding of the subject, guiding them to insights and intuitions about the realities of the practice. The challenge is how to share this understanding. To teach effectively, practitioners first have to structure their own thinking and reflect upon what they might offer students, while being true to who they are.

Reading assignments convey regional or issue-specific knowledge; they are interdisciplinary, sometimes biographical and policy-relevant. Very rarely do FSOs assign readings from the academic subfield of diplomatic studies; somewhat more often, they include material from the fields of foreign policy analysis and diplomatic history. Most admitted in our interviews that they had no time for reading academic literature while practicing their profession and began doing so only after deciding to teach. Thus, their reading is governed by what they have

already chosen to teach as they search for materials to support their course objectives. Often, they adopt material used by other teaching FSOs.

### Think of a Zipper

In spite of the limitations of the material chosen, the story of American diplomatic practice that emerges from syllabi written by practitioners is one of professionals for whom power, process and values are inherently linked. They go into the world representing the United States and, repeatedly crossing sovereign boundaries, figure out the personalities of the people who count on the issues that matter to the United States, and then build personal relationships to manage national differences and align them politically to achieve objectives. They succeed when they understand the political communities in which they work well enough to advance the objectives of the community they represent with knowledge, tact and integrity.

One metaphor for this approach is a zipper. We ask a lot of a zipper slider, that small little piece with a tiny handle that we operate by hand to mesh or separate the alternating teeth on chains attached to adjacent flexible parts. We know from experience that when the slide fastener fails, when it is no longer able to couple and interlock the teeth protruding from fabric tape attached to the separated sides, we are in trouble. Jackets are no longer warm, luggage is no longer safely sealed shut, and blue jeans are a bit more exposing than we intended. The slider is an inexpensive part, really. But when it does not work properly—when it does not engage the articulated teeth, align the sides and withstand the tension between them—the expense of fixing the ensuing problem can be quite substantial.

Diplomacy is like that. As diplomacy studies theorist Paul Sharp conceives of it, diplomacy routinely enmeshes separated political communities into a single international whole, while recognizing the plurality of interests and values that keep nations wanting to be apart. Fundamentally, diplomacy functions politically through a series of nearly imperceptible adjustments along the chain of relationships between representatives of states and the international organizations created



by states to manage international order.

Like the humble zipper, diplomacy is a modest everyday tool with a significant function. It is a permanent dialogue conducted on a daily basis by American representatives with their foreign counterparts. We take it for granted when diplomacy succeeds in protecting and advancing our national interests, as it should; and we pay the price when, by abuse, neglect or ignorance, the profession fails in its responsibility.

### Academics: Think Velcro

For academics teaching diplomacy, the zipper conveys an image of classical interstate diplomacy, but it does not capture the complexity of diplomacy in today's mixed-actor global environment. Diplomatic studies scholars continue to see diplomacy as a recognized international institution defined by international conventions and laws that must be learned. Yet, because they are interested in teaching how systems change, they look beyond the official diplomatic corps to bring the tumult of international societies, and civil society acting transnationally, into sharper relief.

The changes brought by globalization and technology affect the practice of diplomacy itself. The hand of the State Department no longer controls the little handle on a zipper that binds separated entities one to another. The national interest is harder to determine and harder to pursue because corporations, NGOs and individuals work their politics across sovereign borders when necessary to achieve their objectives. They even carry their concerns to the United Nations and other multilateral institutions directly when thwarted domestically.

Because of this power diffusion within and among states, the international policy environment has experienced a sharp increase in participation by global actors who are not states; officials who are experts in matters other than diplomacy based outside of foreign ministries; and private citizens acting transnationally. Overlap, not separation, sets the context for modern diplomatic engagement. Multiple policy venues, parallel bodies and agreements, and thousands of international institutions create unending choice, if not chaos. These conditions require a "hairier," more intricate diplomatic process that resembles fastening the many hooks and loops of Velcro to get agreement rather than zipping together the official, sovereign teeth of old.

Some scholars, like The George Washington University's



Courtesy of Joe Johnson

Donna Oglesby speaks at the Nov. 12, 2013, forum, "U.S. Public Diplomacy: A Look to the Past, A Look to the Future," held at the Department of State.

Bruce Gregory, believe that diplomacy's public dimension has so intensified that public diplomacy is no longer a distinct function. He would merge the two roles to more effectively conduct a "new diplomacy" better adapted for the times. Because of their attention to the public dimension, the work of diplomacy studies scholars is well represented in the syllabi of practitioners teaching public diplomacy courses in American universities, as it is in those taught by affiliated academics.

Academics teach about multilateralism and conference diplomacy with actors whose expertise is not diplomacy. They highlight the diplomatic practices of small states and middle powers that approach the world as a collection of challenges that only a worldwide cooperative process can address. In their classrooms, academics note the whole-of-government global engagement that is shrinking the traditional primary role of foreign ministries around the world. They explore the expanding missions of domestic government agencies migrating abroad in response to complex problems that know no sovereign boundaries. Their courses also address the boundaries between global governance and diplomacy, asking pointedly who is a diplomat in today's world.

As one would expect, diplomatic studies scholars do teach

## **As American economic, political and military power wanes, however, the achievement of American foreign policy objectives will depend to a greater extent on Foreign Service professionals' knowledge and skills.**

theory. More surprising, perhaps, they also teach diplomatic practice by incorporating memoirs, case studies and comparative examination of the structures and processes of different states and regions in their syllabi. They consider the ethical dimension of diplomatic practice as well as diplomatic law. Some non-American practitioners, like the former ambassadors Kishan S. Rana (India), Jorge Heine (Chile) and Geoffrey Wiseman (Australia), are active diplomatic studies scholars. Their work is important in highlighting the differences in Western and non-Western diplomatic structures, processes and styles.

### **The Tapestry of International Diplomacy**

Academics take care in their texts and course design to illuminate non-Western diplomatic traditions and systems in order to highlight the Eurocentric principles of traditional diplomacy that many assume to be natural and universal. They separate out the American diplomatic style as only one of many to be studied and compared, and discuss the differing national negotiating styles.

Diplomacy studies scholars also speculate on the future of diplomacy. Some wonder if, among the possible futures, there might be a return to the rules of Westphalia—mutual non-interference, an emphasis on sovereignty and the formal equality of states—once rising powers like China and India gain power and influence.

This literature on diplomacy is essentially unknown to most FSOs teaching diplomacy. When I mentioned the names of prominent diplomacy studies scholars, such as Paul Sharp, Jan Melissen and Brian Hocking, during my interviews with practitioners, most did not recognize them. Similarly, with few exceptions, I got no reaction when I mentioned recent texts on diplomacy: *Diplomacy in a Globalizing World: Theories and Practices* (2013), *The Oxford Handbook of Modern Diplomacy* (2013), or *Diplomatic Theory of International Relations* (2009).

This is neither surprising nor alarming. Although by design, the study of foreign policy has been excluded from the diplomacy studies paradigm since Harold Nicolson made the distinction between foreign policy and diplomacy in 1939, American

diplomats do not accept that distinction and do not employ it in their teaching. As master American practitioners, FSOs teach what they have experienced and know.

Whether American diplomats are outliers because of our particular political culture or because of our predominant power position in the world is a matter of debate. As American economic, political and military power wanes, however, the achievement of American foreign policy objectives will depend to a greater extent on Foreign Service professionals' knowledge and skills. Studying both the American diplomatic tradition and the evolving international diplomatic culture within which Americans must operate will be essential to succeed.

Keeping faith with the calling to serve the United States as a diplomat, in an era when Congress cannot manage to confirm career ambassadorial nominees for months on end, must be difficult. These prescient words of George F. Kennan, from 1961, might offer some solace: "Diplomacy is always going to consist to some extent of serving people who do not know that they are being served, who do not know that they need to be served, who misunderstand and occasionally abuse the very effort to serve."

A profession that stands still for its portrait in our rapidly changing world, however, runs the risk of becoming a still life. The times demand rededication to the quality of American diplomacy. Professional renewal requires continuing education in diplomacy, understood to be an international institution, a national practice and a set of expectations members of the international community have of one another.

Try as we might to avoid being in the world politically, working with others and having our objectives modified by them, the United States has no choice. Exceptional as we might be, we do not have the wherewithal to reweave global society on a universal loom we control. Nor can we pull our national threads out of the fabric of international society without unraveling the whole that serves our interest.

Consequently, we need to master diplomacy: the practice of sustaining official international relationships capable of withstanding vigorous political argument, even conflict, increasingly conducted in the public square. ■

“If you want truly  
to understand  
something, try  
to change it.”

*Kurt Lewin*

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# DIPLOMACY WORKS: A Practitioner's Guide to Recent Books

**The publication of books on diplomacy as a distinct discipline has increased recently. Hopefully, it is a trend that will continue.**

BY ROBERT DRY

**W**e are witnessing a new high-water mark in important works on diplomacy not seen since the early 18th century, when *De la manière de négocier avec les souverains* (“On the Manner of Negotiating with Sovereigns”) and *The*

*Ambassador and His Functions*, by de François Callière and Abraham de Wicquefort, respectively, made their appearance. In arguing this, I adhere to the distinction between works on diplomacy and those on foreign policy, a distinction often credited to the eminent diplomatic thinker of the 20th century, Sir Harold Nicolson.

Granted, the printing presses constantly bring us books and articles on foreign policy and diplomatic history, including the many memoirs of diplomats and statesmen, but the high incidence of works concentrated on diplomacy as a separate discipline or institution is remarkable, and very welcome. Hopefully, this trend will continue and lead to a greater understanding of the diplomatic instrument of power.

Former Deputy Secretary of State William J. Burns, in his swan song presentation to State Department employees on

Oct. 23, used the expression “measures short of war,” alluding to George Kennan’s seminal lecture on preventive diplomacy on Sept. 16, 1946, at the National War College. Kennan’s lecture remains noteworthy and should be read by every entrant into the Foreign Service. In many ways, it is a platform to build on.

While practitioners of diplomacy may possess an intuitive understanding of “how” their profession works, close study of the institution of diplomacy can improve the knowledge of even seasoned practitioners. What I would have given, when I first entered the Foreign Service, to have been able to read former FSO Harry Kopp’s *Career Diplomacy* (Georgetown University Press, 2011); AFSA’s *Inside a U.S. Embassy: Diplomacy at Work*, now in its third edition (FS Books, 2011); or any of the works of former Indian ambassador Kishan Rana of the DiploFoundation!

Similarly, I would have benefited from exploring the books I discuss below, which draw on the legacy of earlier diplomatic thinkers. Each provides rich context for the efforts performed daily at diplomatic and consular missions in the field, or at headquarters.

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*Robert Dry, a retired FSO, is chairman of AFSA’s Committee on the Foreign Service Profession and Ethics, and teaches at New York University.*

## **The Oxford Handbook of Modern Diplomacy**

My first reaction to *The Oxford Handbook of Modern Diplomacy* (Oxford University Press, 2013) was that it was anything but a handbook at 950 pages! But after reading many of its standalone chapters, I consider it an important contribution to modern diplomacy.

Inspired by work done in the Center for International Governance Innovation, and edited by distinguished CIGI practitioner-scholars Andrew Cooper, Jorge Heine and Ramesh Thakur, *The Oxford Handbook* contains a range of insightful articles and case studies by practitioners and theoreticians from around the world. Many of these experts are familiar, like Joseph Nye, who writes the article on “Hard, Soft and Smart Power” in the “Tools and Instruments” section. But other authors I rarely find in print. In that regard, consider the superb chapter on “Mediation” in the “Modes of Practice” section by former Finnish president and Nobel Prize recipient Martti Ahtisaari, written together with Kristiina Rintakoski.

After describing mediations in which he served as a United Nations special envoy and the lessons he learned from them, Ahtisaari concludes his chapter on an important note about the relevance of mediation today and urges his fellow mediators to tap the comparative advantages that non-state entities can bring to conflict management and resolution. “The old techniques of power and deterrence seem increasingly less relevant to deal with the problems and conflicts confronting us,” he writes. “Mediation may well offer the most coherent and effective response to these issues. To ensure that it can also be successful, we need to develop a better understanding of the process and offer consistent guidelines to the many actors involved in mediation.”

Moreover, Ahtisaari continues, “Networks have become a vital tool for a mediator. Actors include transnational nongovernmental organizations, multinational corporations, international organizations and regional organizations. Engaging a considerable number of players at different levels of diplomacy, and exploiting their comparative advantages while being able to manage



The Dutch diplomat Abraham de Wicquefort (1606-1682), above, wrote one of the first great texts on diplomacy, *The Ambassador and His Functions*.

the complexity for the benefit of the peace process, form a part of a mediation process design. Often the potential of several tracks of diplomacy is underutilized.” I often tell my students that what is sometimes lacking in conflict resolution is not the will of the parties, critical as that is, but the design of the negotiation process. It would be profitable, as Ahtisaari suggests, that mediations be analyzed to determine what made them successful or not.

While *The Oxford Handbook* approaches traditional areas of diplomacy with a modern focus, much of its value comes from the sections devoted to the evolving realms of “non-traditional” forms, such as the chapters on “Economic Diplomacy” and “Trade and Investment Promotion.” Anyone who has served in the Bureau of Economic and Business Affairs, or at the Organization for Economic Cooperation and Develop-

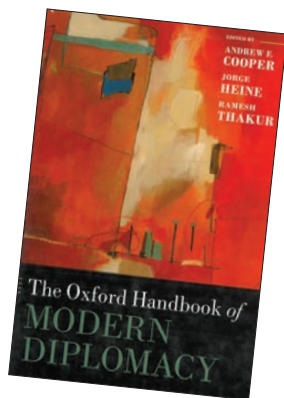
ment, will appreciate that these authors possess a strong grasp of the subject matter. Other sections discuss the role global and transnational firms play in the “network” diplomacy of the 21st century. Two of the 10 case studies in the concluding section also treat economic matters: “The Doha Development Agenda” and “The Economic Diplomacy of the Rising Powers.”

Speaking as a former environment, science, technology and health officer, I was pleased to find chapters in *The Oxford Handbook* addressing subjects like health, climate

change and food security. I had hoped to also see the subject of religion and diplomacy among the chapters on nontraditional diplomacy, because the appointment by Secretary of State John F. Kerry of Dr. Shaun Casey as director of the new Office of Faith-Based Community Initiatives is a long-overdue watershed event in American diplomacy. Its absence from the Oxford tome is an indication that diplomacy continues to evolve.

I recommend *The Oxford Handbook of Modern Diplomacy* to students and practitioners alike. Its content is up to date and largely free of the jargon one finds in too much academic writing. While there

is footnoting, it is accessible and useful to anyone wishing to go deeper into the material. I plan to keep this work on ready reserve for the course I teach at New York University and assign



## **The Oxford Handbook approaches traditional areas of diplomacy with a modern focus, but much of its value comes from the sections devoted to the evolving realms of “non-traditional” forms.**

several chapters from it. I have no doubt eager students will read beyond the assigned parts.

### **Other Notable Works**

Alas, I cannot as wholeheartedly recommend the 2011 *Routledge Handbook of Diplomacy and Statecraft*, edited by B.J.C. McKercher. While it is certainly handier than *The Oxford Handbook* at just 489 pages, its typeface is so small that I had to squint to read it. Moreover, three-quarters of its content discusses the foreign policy of various nations, not diplomacy. As something of a purist, I had hoped for the reverse ratio, in keeping with the book's title.

That said, I found some useful material here. Christer Jönsson, a Swedish professor and co-author of *Essence of Diplomacy* (2005), contributed the excellent chapter on “Theorising Diplomacy.” Not being an expert on this topic, I found Jönsson's explanation lucid and useful. But I found Professor Jeremy Black's opening chapter, “Diplomatic History: A New Appraisal,” to be a bit obscure, particularly in comparison with his excellent book, *A History of Diplomacy* (University of Chicago Press, 2010).

Speaking of Routledge, I would encourage readers interested in public diplomacy to peruse the 2009 *Routledge Handbook of Public Diplomacy*, published in association with the University of Southern California's Center on Public Diplomacy. I often review the Center's website for insightful research and discussions on PD ([www.uscpublicdiplomacy.org/publications](http://www.uscpublicdiplomacy.org/publications)).

Another sweeping work on diplomacy is Oxford's sixth edition of *Satow's Diplomatic Practice* (originally published in 1917, and reissued as a paperback in 2011), edited by Sir Ivor Roberts, the former British diplomat and scholar. This is not

a book one picks up and reads from start to finish. Rather, it is more a handy reference tool—marvelously written—to dip into when dealing with complex issues of diplomatic law and practice. I've used it on several occasions to get quickly up to speed.

While there is a bias toward British diplomatic practice in the book, the editors do highlight divergent practices on a topic of diplomatic law and practice, especially when the other view is that of the United States. For instance, Sir Ivor furnishes a succinct yet clear analysis of different governments' approaches to asylum, a subject for which there is no settled practice.

Though Satow may seem quaint now, it can still be extremely useful for entry- and mid-level FSOs confronting serious questions like agreement or asylum for the first time. So I urge every embassy, however meager its book allowance, to splurge on this impressive update of Satow's classic. You and your successors will appreciate it.

Another handy reference work is Marjorie M. Whiteman's *Digest of International Law*, which the State Department published in 1963. Sadly, it is out of print, but most post libraries probably have a copy.

A more recent general work well worth acquiring is *Diplomatic Practice Between Tradition and Innovation* (World Scientific, 2010) by Juergen Kleiner, former German ambassador and emeritus professor of international relations at Boston University.

Probably the most prolific contemporary writer on diplomacy is Professor Geoff R. Berridge, formerly of the University of Leicester and now a senior fellow at the DiploFoundation. Each of his many books is impeccably written and full of insights into the fascinating formation of modern diplomacy. His textbook, *Diplomacy in Theory and Practice*, now in its fourth edition





(Palgrave, 2010), is almost certainly required reading for almost all courses in diplomacy in the English-speaking world. Unlike the tomes described above, Berridge's treatment is succinct, yet it covers the essential ground. Its centerpiece is diplomatic negotiation.

I also recommend two other recent Berridge works: *The Counter-Revolution in Diplomacy and Other Essays* (Palgrave, 2011) and *Embassies in Armed Conflict* (Palgrave, 2012). All diplomats should read the latter book just in case they one day find themselves serving in a country embroiled in war. My only criticism of these books is that they are costly. Get your library to buy them for you.

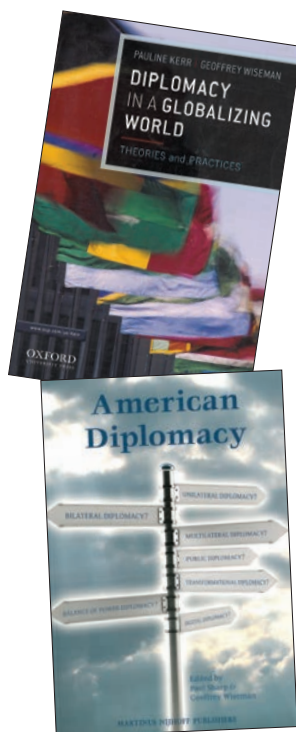
## Foundational Approaches

For those who seek to teach a foundational course in diplomacy covering a larger palette, there are now a number of competitors to Berridge. These include Geoffrey Pigman's *Contemporary Diplomacy* (Polity, 2011); Jean-Robert Leguey-Feilleux's *The Dynamics of Diplomacy* (Lynne Rienner, 2008); and—probably the most readable and interesting account—former Canadian diplomat Daryl Copeland's *Guerrilla Diplomacy: Rethinking International Relations* (Lynne Rienner, 2009). Even newer works include Corneliu Bjola and Markus Kornprobst's superb treatment of diplomacy, *Understanding International Diplomacy: Theory, Practice and Ethics* (Routledge, 2013) and—my hands-down favorite and one of the texts I require my students to read—*Diplomacy in a Globalizing World: Theories and Practices* (Oxford University Press, 2012), edited by scholars Pauline Kerr and Geoffrey Wiseman.

Kerr and Wiseman have brought together 23 essays by experts in the field of diplomacy. These were all subject to strict editorial review, enhancing accessibility for those new to the subject. The book has a clear logical structure, as each chapter builds on the earlier ones. Among the topics covered is East Asian diplomacy, a subject modern students of diplomacy would do well to spend some time on. And as a bonus, the book includes an instructor's guide with supplemental material.

Finally, I would like to commend the contributions of a retired Indian ambassador who now devotes himself to teaching and writing about the practical aspects of diplomacy, Kis-

**Each of Prof. Geoff R. Berridge's many books is impeccably written and full of insights into the fascinating formation of modern diplomacy.**

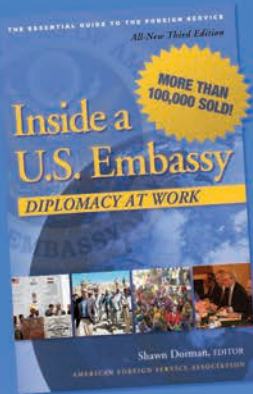


han Rana. Ambassador Rana has written a series of books, the most recent of which is *21st Century Diplomacy: A Practitioner's Guide* (Continuum, 2011; part of the Key Studies in Diplomacy Series edited by Professor Lorna Lloyd), that are true go-to guides for every diplomat.

I would be remiss, however, if I left readers with the impression that these new volumes in any way supplant the great classics, such as Sir Harold Nicolson's *Diplomacy*; George Kennan's lectures from his service at the National War College following World War II, including "Measures Short of War"; and Henry Kissinger's *Diplomacy* (Simon & Schuster, 1994). Those are all on par with the seminal works of de Callières and de Wicquefort I mentioned at the beginning of this essay.

That said, books are far from the only excellent materials available about diplomacy. Among the many periodicals practitioners will find useful is *The Hague Journal of Diplomacy* (Brill Publishers), specially designed to capture research into diplomacy. Professor Paul Sharp, author of *Diplomatic Theory of International Relations* (Cambridge, 2009), and Professors Jan Melissen and Geoffrey Wiseman provide the editorial stewardship of *The Hague Journal*. I particularly commend the special edition devoted to American diplomacy (Vol. 6; Nos. 3-4, 2011), now available as a book, *American Diplomacy* (Martinus Nijhoff, 2012).

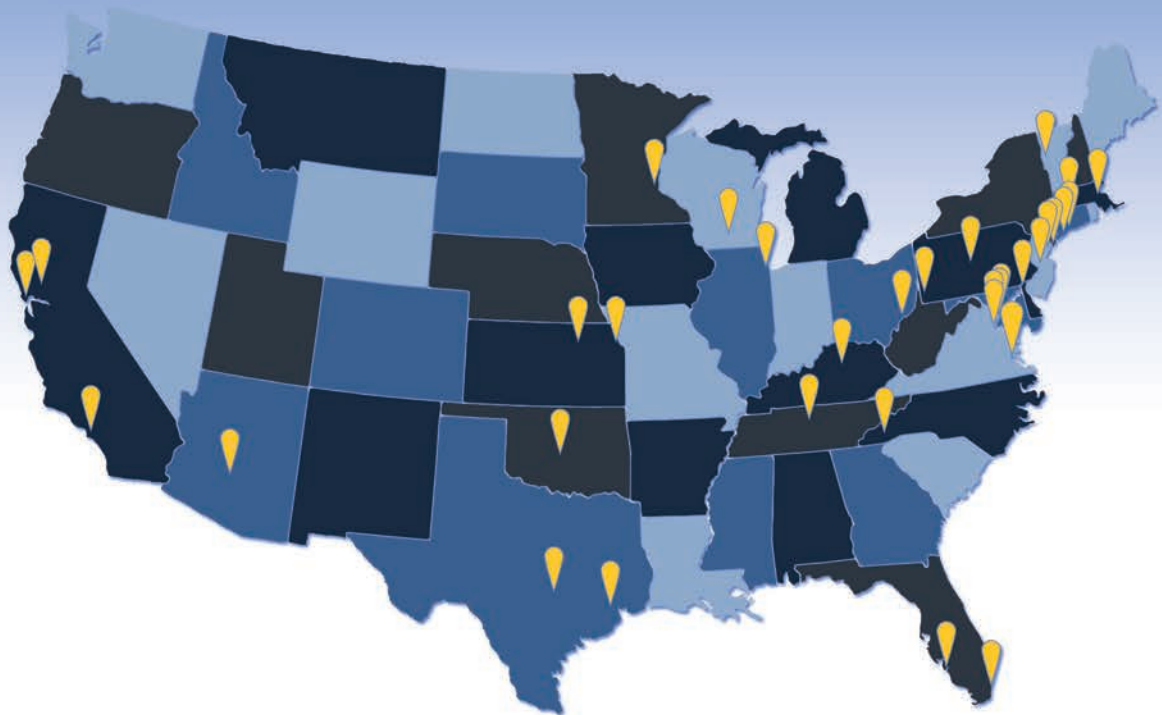
Add to the list online publications from institutes around the world—from the U.S. Army's Strategic Studies Institute and the USC Center on Public Diplomacy, to Clingendael and the Norwegian Institute of International Affairs—and professional diplomats will find much to support and develop their knowledge and skills. ■



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# PRACTITIONERS, SCHOLARS AND The Study of Diplomacy

**The relationship between practicing diplomats and international relations academics is fraught, and they are certainly not on the same wavelength when it comes to teaching diplomacy. Does it matter?**

BY PAUL SHARP

**G**enerally speaking, practitioners of diplomacy are not interested in what the people who study international relations have to say about them. When they do glance at an academic book on diplomacy, they will often be puzzled as to why so much time and space was required to make the point in question.

A visit to an academic conference on international relations can be similarly fruitless. Good luck to practitioners who seek a panel on diplomacy as a safe haven in a sea of mathematical modeling and impenetrable discussions about how identities are constructed and constituted. They are likely to find instead a group of people who speak in tongues and beat their insights to death, talking about things which seem as remote from the world of ordinary diplomats as one could imagine.

Fortunately (at least if one values symmetry in relationships), the diplomats' lack of interest in academics is fully reciprocated. Within academia, diplomacy is not one of the hot research areas compared with, for example, international theory, international political economy, international organization or global governance (although public diplomacy has made something of a showing recently). The subject of diplomacy does not even appear

in the index of many new international relations textbooks; and when it does, the listing usually directs readers to the briefest discussion of ideas like immunity and asylum, before moving them along to the much more developed subfields of negotiation, mediation and bargaining.

To add insult to injury, even the relatively few academics who are genuinely interested in diplomacy tend to spend their time investigating its declining importance and critiquing its established practices. They argue that it must be overhauled to be of any use in a networked world where information is plentiful, cheap and easy to generate, and in which news travels fast among a host of new international, transnational and global actors. What these students of diplomacy do not do is spend a great deal of time actually looking at professional diplomats and their work, or what they have to say about their chosen profession.

With this in mind, *The Hague Journal of Diplomacy*, which I co-edit, has a section called "Practitioner's Perspectives," in which we ask diplomats to reflect on what they actu-



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*Paul Sharp, a professor of political science at the University of Minnesota Duluth, was founding co-chair of the Diplomatic Studies Section of the International Studies Association and is founding co-editor of The Hague Journal of Diplomacy.*



## **Fortunately (at least if one values symmetry in relationships), the diplomats' lack of interest in academics is fully reciprocated.**

ally do. The best of what we publish in this section is very good indeed, but most of the submissions we get from diplomats in the field are not quite what we are looking for. Instead of reflecting on their own professional experience, they tend to describe the great international episodes they were privileged to witness in the course of their careers, or pontificate on the great international issues of the present and what, in the author's view, should be done about them.

So it would appear, at times, that even diplomats are not interested in the nitty-gritty work of diplomacy. Instead, many of them would very much like to be statesmen orchestrating and presiding over the sort of "l'unité de direction" (literally, unified direction) in policy for which Cardinal Richelieu argued, but to which even Henry Kissinger could only aspire.

### **Theory vs. Practice?**

Everyone feels a bit embarrassed about this state of affairs. The academics acknowledge that diplomacy ought to be important, and the diplomats keep showing up at professional conventions, hoping that academics will have something interesting, important or useful to say about diplomacy (though they often leave disappointed and determined to write a book about diplomacy themselves).

Of course, worrying about the relationship between theory and practice is nothing new. The American political scientist Alexander George spoke many years ago about bridging the gap between international relations and foreign policy by generating hard propositions about what sort of coercive diplomacy is likely to work and under what conditions. And back in the 1970s, retired FSO Smith Simpson found himself in a battle with his colleagues at Georgetown University's Edmund A. Walsh School of Foreign Service over whether they should be teaching diplomatic theory to future diplomats, or exposing them to what were regarded as more practical things which it might be handy for them to know as they embarked upon their careers. That debate led to the founding of the school's Institute for the Study of Diplomacy in 1978.

However, the intensity of that argument has sharpened over the past couple of decades for two reasons. The first has been the increasing pressure on those teaching and conducting academic

research to justify themselves in terms of their usefulness, not just to the direct beneficiaries of their work but, in public institutions at least, to the taxpayers who fund them.

The second factor has been the emergence of an attempt to place diplomacy at the center of the academic study of international relations by claiming precisely this practical quality for it. In this view, the majority of important international relations work done today continues to be undertaken by diplomats.

Furthermore, in an era where the strategic interplay of superpowers and the adventures of the unipolar interlude have been replaced by a steady slide towards multipolarity, in which no one country dominates, it has been argued that we should expect diplomacy to become more important. Diplomacy should therefore be a primary focus of academic research because it remains, in Raymond Cohen's phrase, "the engine room of international relations." It should also be a principal focus of international relations instruction because it offers one of the best chances for obtaining a job in the field. Discourse analysis, deconstructions of constitutive ideas and theories about the international system, in contrast, may equip a student only for staying in school.

Despite these pressures and efforts, however, the study of diplomacy remains on the margins of consciousness for both diplomats and international relations academics. Why is this so, and should we worry?

### **What Do Diplomats Want?**

Part of answering these questions lies in asking what diplomats would really like to hear from the people who study them. In the main, they seek usable insights from the management sciences about how to organize complex organizations and how to operate effectively within and between them. Practitioners are not interested in hearing from academics about the mysteries and particularities of being a diplomat, any more than professors are interested in hearing from outsiders about the mysteries and particularities of teaching and undertaking research. Rightly or wrongly, both camps think they have this covered.

The other part lies in asking what the people who study diplomacy are interested in and, perhaps more importantly, whom they consider their primary audience. On the whole, they are not inter-

ested in finding out what diplomats do—this is a known. They are a bit more interested in helping diplomats “do diplomacy” better, but this seems to require an understanding of fields other than diplomacy. Moreover, as academics they have no stake in solving the problems of particular diplomatic services and their political masters. Such efforts cross over into the realm of policy advocacy, and there is no shortage of people who already engage in that.

What students of diplomacy *are* interested in is demonstrating why the work of diplomats is so important and ubiquitous—not just to their colleagues but also to the public at large. As long as people live and work in separate groups, each having a strong sense of its separate identity, but each needing relations with others, then these relations will have a distinctive and potentially dangerous character. Experience suggests that such relations are best handled by people steeped in the understandings, conventions and rules which have emerged over centuries and continue to develop, and which we associate with diplomacy.

This is what is unique to diplomacy, those who study it say. Yet paradoxically, it is not particularly interesting to diplomats because they already know it. (At least if they are any good.) What can diplomats do with the information that their symbolic and representational significance is as important, and sometimes more important, than anything they might actually accomplish? And does it really matter to members of the diplomatic corps that their role is one of the very few tangible expressions of the international society or community to which everyone routinely makes reference?

### Adjusting Expectations

The answer to whether or not diplomacy is useful echoes the old defense of the liberal arts. Diplomacy is useful, but only once you take it on its own terms and stop looking for proof of its utility. So, yes, diplomats should continue to glance at academic publications about their profession and attend the occasional international relations conference, hoping not for revelation so much as the odd insightful nugget for future use. They should also speak up when academics seem to have missed the point, and say that, in their experience, at least, “Diplomacy is not like that at all.”

Academics, for their part, should hang out with diplomats once in a while, to remind themselves both of what is special and what is mundane about their profession.

Finally, neither party should worry if the relationship between them is not as close as others—often their respective managers, administrators and consultants—press them into expecting it to be. ■

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# How to Intern at State Without Leaving Home

**The virtual internship is a unique avenue for students to gain experience in a particular field.**

BY AHVA SADEGHI

A high grade-point average and a degree are not enough anymore. In the increasingly competitive job market for young people, there is a new trend that is now a “must-have” on a resume. It is an internship, more often than not, unpaid. This new requirement can be a very rude awakening for many poor college students. After all, internships are not just competitive; they are also extremely costly. Students have to pay for transportation, housing, professional clothes, food and more, to work for free.

However, with the tools of globalization, students can circumvent the burdensome costs of an internship by undertaking a virtual internship. The Department of State has designed the Virtual Student Foreign Service to allow American students the opportunity to intern for different agencies and posts abroad without leaving home.

Although there are many opponents of this type of internship, I can personally vouch for its effectiveness. After having interned in the offices of the Peace Corps, Colibri Center for Human Rights, Southwest Research Center and the Department of State, I could be considered something of an internship expert.

At first, I was quite skeptical about an online internship and how much I could gain from it. I know that my experience with online classes has not measured up to in-class lectures. However, as a student studying in Arizona, a virtual internship was an exciting opportunity. I could work for the State Department while I was studying at my home institution thousands of miles away!

There were more than 300 different internship jobs posted for VSFS when I applied in June 2013, so students are bound




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*Ahva Sadeghi is a senior studying philosophy, politics, economics and law at the University of Arizona. She was a summer 2014 intern with the AFSA Labor Management office. As a participant in the 2013-2014 State Department Virtual Student Foreign Service Internship Program, she worked with the Office to Combat and Monitor Trafficking in Persons, performing 20+ hours of research a week to contribute to the 2014 TIP Report. She has continued her engagement with the VSFS for the 2014-2015 academic year and is now working for the Bureau of Democracy, Human Rights, and Labor to help prepare the 2014 Human Rights Report on the Middle East. In addition to her work with the VSFS Internship Program, Sadeghi has taught English in Korea, founded the University of Arizona's first human rights club and is a cellist in the UA Philharmonic Orchestra.*



## VIRTUAL STUDENT FOREIGN SERVICE VSFS

to find something that interests them. I “e-interne” for the Office to Combat and Monitor Trafficking in Persons. I am the founder of the Human Rights Club on my campus, and am passionate about combating human trafficking, so this was a dream internship for me.

I poured my heart into it, and invested more than 20 hours a week doing media research and translating from Farsi and French on a variety of human trafficking topics: individuals trafficked for the sake of suicide bombing, forced begging and Quranic schools, forced labor and trafficking in the hospitality industry.

Some say that a virtual internship does not provide students with real professional development and networking. However, that is far from the truth. I had to learn to communicate with formal language via phone, email and Skype with my VSFS supervisors. I was expected to promptly return emails and had to be on time for all phone and Skype sessions, for which I dressed professionally.

My intern supervisors acted as mentors, offering me professional development, academic advice and valuable letters of recommendation. They even made the effort to introduce me virtually to other professionals in my field to expand my network. Maybe I was not sitting at an office desk from 8 a.m. to 5 p.m., but I gained valuable professional experience working directly in my field.

Overall, the internship surpassed my expectations, and the virtual component enabled me to apply myself to meet high standards. Like any internship, you get as much out of it as you put into it.

*U.S. News & World Report* states that “internships are a near necessity in the quest to find a job in today’s market.” The virtual internship is a unique avenue for students to effectively gain experience in their field. Now it’s time for more students to capitalize on globalization and technology. Financial and geographic obstacles are no longer an excuse.

As the saying goes, “Where’s there’s a will, there’s a way.” Take advantage. ■



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## “IN THEIR OWN WRITE” IN PERSON

### AFSA Hosts FS Authors Book Market



On Nov. 13, AFSA's main floor conference room was transformed: Foreign Service authors displayed their books to sell, shoppers meandered and mingled, and new connections were made. The first-ever AFSA Book Market was a resounding success.

Following the growing popularity of the November *Journal's* “In Their Own Write” section, which features descriptions of books written by Foreign Service authors, AFSA introduced this new event and invited all of the featured authors to sell their books at AFSA. Seventeen authors, some from as far away as Texas and Georgia, turned up to introduce themselves to readers.

The event saw a steady

stream of visitors from all of the foreign affairs agencies and related organizations, as well as a few who showed up via word of mouth. Authors were able to reach new audiences and connect with old friends and former colleagues.

The books covered a wide range of topics, from in-depth accounts of overseas experiences to biographies of Civil War heroes, from calorie-conscious cookbooks to cultural analysis. “In Their Own Write” books from authors who were unable to attend the Book Market were displayed, as well.



AFSA hosted its first-ever Book Market in November, giving Foreign Service authors and readers the chance to sell, shop and mingle.

Robert Mearkle, author of the novel *The Feller from Fortune*, told the *Journal* he found the Book Market “impressively organized and well advertised.” He added, “[It] showcased some impressive and entertaining literary talent among State’s ranks.”

Greg Willis attended on behalf of his father, Nicholas Willis, nephew of the first woman to make the Foreign Service a career and the author of *Frances Elizabeth Willis: Up the Foreign Service Ladder to the Summit—Despite*

*Continued on p. 46*



## 2014 AFSA TAX GUIDE

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## CALENDAR

January 7  
12-2 p.m.

AFSA Governing Board Meeting

January 8

AFSA Book Notes

Outpost: *Life on the Frontlines of American Diplomacy*  
Amb. Christopher R. Hill

January 19

MLK Day  
AFSA Offices Closed

February 2

Deadline for Nominations  
AFSA Governing Board Election

February 4  
12-2 p.m.

AFSA Governing Board Meeting

February 6

Deadline for Applications  
AFSA Merit and Community Service Awards

February 16

Presidents' Day  
AFSA Offices Closed

February 28

Deadline for Nominations  
AFSA Dissent Awards

March 1-5

AFSA Road Scholar Program



Continued from p. 45



Retired FSO Allen Hansen (left) joined retired USAID FSO Stephen Grant (right) at the Book Market to help set up and run his table. Grant was selling his recent book, *Collecting Shakespeare: The Story of Henry and Emily Folger*, included in the November 2014 *FSJ*, as well as his previously published works. Hansen's *Nine Lives: A Foreign Service Odyssey* had been included in the November 2007 "In Their Own Write."

*the Limitations of Her Sex.*

Willis Jr. recounted a memorable interaction he had with one of Frances Willis' former colleagues, George Griffin, who worked with Frances in Sri Lanka and came to the market specifically to get his copy of the book signed.

Griffin commented on his

time working with Ms. Willis: "I was very intimidated. I was young and heard that Frances was strict, but I was looking forward to working with her. I learned so much."

"The event assembled a rich diversity of authors and subjects under one roof, and that made it truly inspiring," said AFSA's Executive Director Ian Houston. "It was a privilege for AFSA to host and organize this gathering and to open our doors to our members and these talented

authors and thinkers."

For a complete listing of books and authors featured in "In Their Own Write," see the November *FSJ* and the AFSA online book store. ■

—Allan Saunders,  
Advertising/Marketing Intern  
and Brittany DeLong,  
Assistant Editor

## AFSA Welcomes New Labor Management Staff

Two new staff members have joined our Labor Management Office. We would like to welcome Colleen Fallon-Lenaghan and Jason Snyder.

Colleen Fallon-Lenaghan replaces John Long as AFSA's Labor Management counselor. Colleen served previously as an AFSA staff attorney from 1992 to 1998, when she relocated to Michigan.

As part of the AFSA labor management team during that time, she assisted in the negotiation of collective bargaining agreements for Foreign Service employees in the Department of State, USAID, FAS and FCS. She also represented Foreign Service employees in matters ranging from disciplinary issues to security clearance



Colleen Fallon-Lenaghan



Jason Snyder

investigations. Colleen is a native of Pittsburgh and earned her law degree from Duquesne University.

AFSA also welcomes Jason Snyder as the new Labor Management Assistant. He recently received his Ph.D. in international law with an emphasis on human rights from the National University of Ireland, Galway. Jason will be focusing on our constituents in our

bargaining units.

A native of Kentucky, Jason formerly contributed to *The Santiago Times*, covering labor and human rights issues in South America. Most recently, he worked in labor relations in Hawaii and continues to follow labor and human rights issues globally. ■

## NEWS BRIEF

### MOVEMENT ON CAREER AMBASSADOR CONFIRMATIONS

Over the past many months, AFSA has made consistent efforts on Capitol Hill on behalf of the career ambassadorial nominees awaiting U.S. Senate confirmation. AFSA officials and staff have met with U.S. senators and their staffs to emphasize the critical role chiefs of mission play overseas. Following the midterm elections, the lame-duck Senate has been clearing the docket of backlogged ambassadorial nominations. In November, it confirmed the appointments of 21 long-waiting career Foreign Service nominees. In early December the Senate also confirmed two controversial political appointee nominees, soap opera producer Colleen Bell for Hungary and political consultant Noah Mamet for Argentina. For a complete list of ambassadorial appointments visit [www.afsa.org/ambassadorlist](http://www.afsa.org/ambassadorlist).



## Marijuana: Decriminalization, Legalization and the Foreign Service

In November 2014, voters in Alaska, Oregon and the District of Columbia decided to join Colorado and Washington in legalizing the use of marijuana. Recent polling indicates a majority of Americans support its legalization.

However, federal law continues to classify marijuana as an illicit Schedule 1 controlled substance. This month's column explores these contradictions and their implications for workforce development and foreign policy.

### Changing Legal Framework

Four states and the District of Columbia have legalized the recreational use of marijuana, while dozens of other states have legalized its medicinal use. In November New York City announced that its police would no longer arrest individuals for low-level marijuana crimes, but would issue summonses instead.

However, against this rapidly changing legal backdrop, U.S. federal law has remained constant.

### Changing Societal Norms

Polling from the Pew Research Center indicates that a majority of Americans support regulating instead of prohibiting the use of marijuana. Support

**The department needs to be as progressive with its workforce development and discipline policies as it is with global drug policy.**

is inversely correlated with age. It is particularly strong among millennials (those born after 1980) and weakest among the silent generation (those born between 1928 and 1945).

### Increased Department Scrutiny

Despite the changing legal framework and societal norms, the Department of State has continued with an employee disciplinary program more appropriate for the 1980s War on Drugs than that for managing and developing a 21st-century workforce.

It's hard for me to understand the rationale for the department's increased focus on an area that is increasingly being liberalized. At a time when the department is seeking to recruit the nation's best and brightest from a generation in which marijuana use is no longer demonized, and when the department needs to retain employees in which the federal government has already invested hundreds of thousands of dollars, such a discretionary and heavy-handed approach may not be the most effective policy.

### Foreign Policy

In 2011 the Global Commission on Drug Policy, a high-level 22-member international commission including former United Nations Secretary General Kofi Annan and former Secretary of State George Shultz, issued an indictment of the global War on Drugs, stating that it had failed "with devastating consequences for individuals and societies around the world."

In September 2014, the commission released its second report, *Taking Control: Pathways to Drug Policies that Work*, reiterating its recommendations to decriminalize, identify alternatives to incarceration, and place greater emphasis on public health approaches, in addition to now advocating for the legal regulation of psychoactive substances.

Their work is a prelude to efforts to reshape global drug policy at a time when U.N. member states are responding to internal democratic pressure to change (Uruguay decriminalized marijuana in 2013).

The State Department's leaders are beginning to realize that we need to fundamentally rethink how

we conduct our foreign drug policy. In October 2014 Assistant Secretary for International Narcotics and Law Enforcement Affairs William Brownfield spoke about the importance of more flexible interpretations of international conventions and more tolerance for national policies, noting the challenge of enforcing state and federal law in the United States.

So the question remains, as the department seeks to develop and build support for a more flexible and tolerant global drug policy, why does it paradoxically seek the opposite for its current or future employees?

The department needs to be as progressive with its workforce development and discipline policies as it is with global drug policy. Until it is, AFSA will continue to encourage our senior leadership to rethink its approach to the issue while advising employees to comply with federal law and existing department regulations—if they wish to remain with the department.

I look forward to hearing your thoughts on the issue at [asadam@state.gov](mailto:asadam@state.gov). ■

*Next month: The Foreign Service Open Assignments System.*



Views and opinions expressed in this column are solely those of the AFSA FCS VP.  
Contact: [steve.morrison@trade.gov](mailto:steve.morrison@trade.gov) or (202) 482-9088

## All Quiet on Set. Ready. Action?

The results of the 2014 Employee Viewpoint Survey, as it relates to the Foreign Commercial Service's new parent agency, Global Markets, are in. The news is not good. Indeed, they should be cause for concern.

The U.S. Office of Personnel Management released its agency-level reports on Oct. 24. Deputy Under Secretary of Commerce for International Trade Ken Hyatt emailed them to employees a few days later.

Hyatt stated that there was "no improvement in the International Trade Administration's scores over last year." That may be true. However, when comparing this year's Global Market scores to last

year's Commercial Service scores, a different picture emerges.

Negative ratings were up in more than half the 71 work-related categories surveyed. (Work-life balance results were roughly the same as last year.) Comparatively, only eight negative ratings went down somewhat from a year ago. The remaining 27 work-related survey results were, effectively, the same (within two to three percentage points) as last year.

Negative responses increased most in the areas of dealing with poor performers and awards and recognition. By contrast, one area that drew an increased number of

positive responses was office-space improvements (noise levels, temperature, lighting, etc.).

The area with the highest overall negative rating was "resources." Fully 58 percent, (virtually no change from last year) responded that they still did not have sufficient resources to get the job done.

Two areas did see a significant increase in negative scores: whether employees felt a sense of empowerment and whether respondents believed the survey results will be used to make the agency a better place to work.

This last data point is especially troubling, given the inspector general's prelimi-

nary report on ITA consolidation. Fifty percent more respondents felt management would not successfully act on employee feedback than thought it would.

As Ken Hyatt reported two years ago, there is "much room for improvement." More recently, he has stated that "our future depends very much on what you think about ITA and how we go about accomplishing our mission." Under Secretary of Commerce for International Trade Stefan Selig's "Dare to Be Great" challenge is partly designed to help in that regard.

The questions are, "Is it enough?" and "What's next?" ■

### ANNOUNCEMENT

#### DEADLINE FOR NOMINATIONS APPROACHING: CONSTRUCTIVE DISSENT AWARDS

Nominate someone—or yourself!— for an AFSA Constructive Dissent Award. The nomination deadline is **Feb. 28**. AFSA proudly recognizes constructive dissent within the system with four separate awards:

The **W. Averell Harriman Award** is for entry-level (FS-6 through FS-4) officers; the **William R. Rivkin Award** is for mid-level (FS-3 through FS-1) officers; the **Christian A. Herter Award** is for Senior Foreign Service officers; and the **F. Allen "Tex" Harris Award** is for Foreign Service specialists.

Recipients receive prize money and are honored at a ceremony in June in the Benjamin Franklin Diplomatic Reception Room at the State Department.

For more details on the awards and to file a nomination online, visit [www.afsa.org/dissent](http://www.afsa.org/dissent). Please contact Special Awards and Outreach Coordinator Perri Green at [green@afsa.org](mailto:green@afsa.org) or (202) 719-9700 for more information.

### ANNOUNCEMENT

#### DEADLINES APPROACHING FOR AFSA YOUTH SCHOLARSHIPS

The children of active duty or retired AFSA members can apply for college aid. Graduating high school seniors can apply for \$2,500 academic and art merit awards, while incoming/current undergraduates can apply for need-based financial aid scholarships ranging from \$3,000 to \$5,000.

The merit award program submission deadline is **Feb. 6**, and the need-based financial aid scholarship submission deadline is **March 6**.

Not all who submit an application will receive an award.

Visit [www.afsa.org/scholar](http://www.afsa.org/scholar) for details, or contact AFSA Scholarship Director Lori Dec at [dec@afsa.org](mailto:dec@afsa.org) or (202) 944-5504.





## Making Sense of the FSPS Annuity Supplement

Most Foreign Service personnel today are in the Foreign Service Pension System retirement system. One of its most confusing aspects is the FSPS annuity supplement.

If you have yet to participate in the Retirement Seminar or Job Search Program, you may not ever have heard an explanation of it in plain English. I will try now to describe it.

The FSPS annuity supplement is a benefit—on top of the monthly pension—payable to certain individuals who retire before age 62, are in the “new” FSPS retirement system and are entitled to an immediate annuity. If this applies to you—and it does apply to many—read carefully.

The supplement’s purpose is to provide a level of income *before age 62* that is similar to what an annuitant would receive at age 62 as part of Social Security benefits. It is calculated as if the annuitant is 62 (the earliest eligibility for full, though reduced, Social Security benefits) and fully eligible to receive them on the day of actual retirement. When the annuitant actually reaches 62, any annuity supplement ends.

The supplement is subject to an annual earned income earnings test, similar to the one applied to Social Security benefits. However, the earnings test does not kick in

**While the FSPS annuity supplement is a nice financial benefit for younger Foreign Service retirees, I do not recommend it as the sole driver in determining whether to retire earlier than you otherwise plan.**

until the retiree reaches his or her minimum retirement age (MRA). For someone born before 1965, the MRA is 56 years. The MRA ramps up, gradually, to 57 for a person born in 1970 or later.

In essence, then, as long as you are under your MRA, you should be able to earn as much as you want in another job without fear of reducing your FSPS annuity supplement. To show continued supplement eligibility after reaching their MRA, annuitants must submit an FSPS Annuity Supplement Report (DS-5026) to the HR Service Center at the end of each calendar year.

On this form the annuitant declares earned income for the previous year. The current (2014) earned income cap is \$15,480, after which the supplement is reduced by \$1 for every \$2 of additional earned income.

**If you reached your MRA and are receiving an annuity supplement, don’t forget to send in the DS-5026 form by early January.** Otherwise, the State Department may ask for repayment of any overpayment. Reduction, termination or reinstatement of benefits becomes effective on Jan. 1 of the year following the year of income reported.

By the way, earned income includes all wages from employment covered by Social Security and various other cash-based incomes. It does not include pensions and annuities, distributions from a Thrift Savings Plan or Individual Retirement Account, unemployment compensation, interest or dividends not resulting from a business or trade, or most rental income.

For more information on the FSPS annuity supplement, visit the Retiree Services page on the AFSA website at [www.bit.ly/AFSA\\_AnnuitySupp](http://www.bit.ly/AFSA_AnnuitySupp).

While the FSPS annuity supplement is a nice financial benefit for younger Foreign Service retirees, I do not recommend it as the sole driver in determining whether to retire earlier than you otherwise planned to do. Retirees who are initially eligible often discover when they reach their MRA that they quickly surpass the low earned income cap.

So make your retirement plans, commit to fulfillment of your dreams, and don’t fret the annuity supplement. ■

### ANNOUNCEMENT

#### REMINDER: ANNUAL HS ESSAY CONTEST NOW ACCEPTING ENTRIES

AFSA’s 2015 National High School Essay Contest is now accepting entries.

All students who are U.S. citizens and whose parents are *not* in the Foreign Service are eligible to participate if they are in grades nine through 12.

The winner will receive \$2,500, a trip to Washington, D.C., to meet the Secretary of State and a full-tuition scholarship for a Semester at Sea voyage. The runner-up will win a full scholarship to participate in the International Diplomacy program of the National Student Leadership Conference.

The deadline for entry is 11:59 p.m. EST on March 15. Details and essay topic can be found at [www.afsa.org/essaycontest](http://www.afsa.org/essaycontest).

## The Burden of the BlackBerry: AFSA Addresses Email Overload

On Nov. 4, AFSA hosted a discussion aimed at helping foreign affairs agencies formulate guidelines to address a common problem: email overload.

Titled “No Relief: The Challenges of 24/7 Email,” the event featured a panel of speakers, with AFSA Govern-

ing Board member Homeyra Mokhtarzada as emcee. Panelists were AFSA State Vice President Matthew Asada, Bureau of Information Resource Management’s Strategic Communications Adviser Joel Wisner, Health and Wellness Program Manager Darrel Kniss

from the Office of Medical Services, and Senior Human Resources Specialist Jacqueline Ridley.

Asada initiated the discussion with a presentation on AFSA’s interest in starting the conversation on issues of work-life balance: “We know that there are going to

be times when after-hours work is necessary. But there are ways to ameliorate the demands and the impact on employees.”

Panel members expanded on the various aspects of the problem, focusing on industry trends, employee wellness and tips for reducing burnout. They also discussed what steps to take next to address the problem.

The audience shared personal experiences and proposed solutions in the question-and-answer session that followed.

To view the event, visit [www.afsa.org/video](http://www.afsa.org/video). ■

—Brittany DeLong,  
Assistant Editor



Panelists lead a discussion on the burden of after-hours emails. From left: Darrel Kniss, Joel Wisner, Jacqueline Ridley, AFSA VP Matthew Asada and AFSA Governing Board member Homeyra Mokhtarzada.

## BOOK NOTES

### AP’s Former State Correspondent Speaks at AFSA



Former AP correspondent George Gedda spoke about his 40 years on the diplomatic beat and his book on the same topic as part of AFSA’s regular Book Notes series.

On Oct. 27, AFSA welcomed former Associated Press State Department correspondent George Gedda to speak on his recent book, *The State Department: More Than Just Diplomacy*, published in April 2014.

Gedda shared stories from his 40 years on the diplomatic beat and recalled his travels to 88 countries while covering nine Secretaries of State, from Cyrus Vance to Condoleezza Rice.

Gedda arrived in Washington, D.C., in 1968, and was assigned to cover the State Department, with a focus on Latin America.

On his style of reporting, Gedda explained his philosophy: “I was never that aggressive. I was supposed to cover and uncover stories, not offend people.”

Video of his presentation, as well as all previous Book Notes talks, are available at [www.afsa.org/video](http://www.afsa.org/video). ■

—Sarah Kay, Communications Intern

## FSO Explores Social Media and Diplomacy

On Oct. 2, AFSA welcomed foreign affairs interns to its third Brown Bag Series event, “Social Media and Diplo-



State's Director of Digital Engagement Vinay Chawla spoke on the power of social media at an intern event.

macy,” featuring FSO Vinay Chawla, the State Department's director of digital engagement in the Bureau of Public Affairs.

Chawla spoke on the power of social media as a platform to inform the public, specifically young adult audiences. He discussed the nine social networking tools the State Department employs: Facebook, Twitter, Flickr, YouTube, Google+, Tumblr, Instagram, the DipNote blog and the long-form online magazine, *Medium*.

“We really have opportunities to interact in new formats,” Chawla said. “We’ve been able to take on some important topics,” he added, demonstrating how social media extends the State Department’s reach. For example, when Turkey banned Twitter in March, the State Department responded

by posting an article, “21st-Century Book Burning,” on its DipNote blog. The article was widely circulated, appearing on the front page of three Turkish newspapers.

Chawla noted that John Kerry became the first Secretary of State to hold a Google Hangout, which included an interactive discussion on the United States’ response to the use

of chemical weapons in Syria.

Chawla also described how his team looks at data to determine what content is popular, what is being shared and where traffic is coming from. This type of information has the potential to help the State Department build relationships it might not otherwise have established.

During a question-and-answer session, Chawla acknowledged that incorporating risky pictures and videos has a positive effect on circulation, but explained that decisions on content need to be based on how the post will reflect on the State Department.

The series will continue in 2015. Interested students and interns should check the AFSA website for upcoming events. ■

—Brittany DeLong,  
Assistant Editor

## AFSA Visits State's Charleston Facilities

As part of AFSA's outreach to members and agency management alike, State Vice President Matthew Asada and Labor Management Senior Adviser James Yorke visited the State Department's Global Financial Services Center in Charleston, South Carolina, in November.

They met with Acting Comptroller General Chris Flaggs and other senior officials in the Office of the Comptroller General of Financial Services, to discuss the procedures for debt recovery, emphasizing ways to ensure more timely notification to employees about overpayments and to reduce the current large number of overpayments (see “AFSA Files Cohort Grievance on State OCP Adjustments” in the November 2014 *FSJ* for more details).

Yorke and Asada also visited the Charleston Passport Center, where they met with Deputy Director Teyako Gibbs-Woods and with Boyd Hinton, the senior steward at the National Federation of Federal Employees, one of AFSA's sister unions.

Later, they visited the Office of Human Resources



From left: AFSA Senior Labor Management Adviser James Yorke, HR Shared Services Director Tracey Mahaffey, and AFSA State Vice President Matthew Asada.

Shared Services. There they met with Director Tracey Mahaffey and toured the facility, learning how HRSS interacts with offices and employees throughout the State Department.

Of particular interest were the offices devoted to helping retirees, annuitants and survivors navigate the complexities of the Foreign Service retirement system.

They concluded the visit with a roundtable discussion with AFSA members in Charleston. ■

—James Yorke, Senior  
Labor Management Adviser



## AFSA's Shower Diplomacy

On Oct. 8 AFSA and the State Department's Bureaus of Administration and Human Resources celebrated the opening of two new shower rooms in State Annex 3, on Virginia Avenue N.W.

Deputy Assistant Secretary for Operations Keith Miller, Deputy Assistant Secretary for Human Resources Marcia Bernicat, Division Chief of the Bureau of Human Resources Work Life Division Judy Ikels and AFSA State Vice President Matthew Asada each spoke briefly on the origins of the shower project and the importance of employee wellness initiatives.

They were joined at the ceremony by Project Manager Matthew Lindstrom of the Office of Real Property Management.

The idea for an SA-3 shower originated more

than two years ago during an after-work conversation between Asada and Adam Bodner, director of the Office of Real Property Management at Main State's own shower facilities. They questioned whether it would be possible to get a similar facility in SA-3 to support the department's wellness initiatives and encourage exercise to, from or at the workplace.

The SA-3 shower project is an excellent example of AFSA's commitment to making the department one of the premier employers within the federal government.

AFSA is a strong supporter of this and other department wellness initiatives and included a quality of work/life goal in its 2013-2015 Strategic Plan ([www.bit.ly/AFSAplan](http://www.bit.ly/AFSAplan)).

AFSA has called on the department to ensure that



Deputy Assistant Secretary Keith Miller, Deputy Assistant Secretary Marcia Bernicat, Division Chief Judy Ikels, AFSA State Vice President Matthew Asada and Project Manager Matthew Lindstrom inaugurating the new SA-3 shower facility.

there is at least one free shower facility in every annex. SA-3's new shower facility is the latest down payment on that pledge and joins 12 other department annexes with free showers.

The ceremony was the first in a series of AFSA events supporting the department's Work-Life Wellness Month. AFSA also organized an after-work run

and a panel discussion on managing after-hours email (see p. 50).

AFSA is also contributing to the department's response to the White House's June 23 memo ([www.bit.ly/WorkLifememo](http://www.bit.ly/WorkLifememo)) on improving work-life wellness across the federal government. ■

—Daniel Thwaites,  
Labor Management Intern

## AFSA President and State VP Present Midterm Review at FSI

On Oct. 22, AFSA President Robert Silverman and State VP Matthew Asada hosted a "Midterm Review" lunch at the Foreign Service Institute.

As they had done in a similar outreach event at AFSA headquarters in August, the AFSA officials presented an overview of the association's advocacy, engagement and

communication efforts to active-duty State members currently at FSI.

They highlighted progress made on AFSA's 2013-2015 strategic plan and FSI-specific successes, such as the launch of the Capitol BikeShare station (see September 2014 AFSA News). During the question-and-

answer session that followed, members raised concerns on FSI training, child care and IT skills-incentive pay.

Silverman and Asada encouraged members to get involved with their union and professional association by joining an AFSA committee, becoming a post representative, or standing for election.

A video of the event is available at [www.afsa.org/video](http://www.afsa.org/video).

AFSA held another outreach meeting on Nov. 25 at Main State, and has scheduled a similar event on Jan. 20 with active-duty Diplomatic Security specialists at Diplomatic Security headquarters (SA-20). ■

—Lindsey Botts,  
Labor Management  
Executive Assistant

## AFSA Increases Dues for 2015

AFSA has increased dues for 2015 by 1.7 percent for all individual membership categories. In concrete terms, it amounts to an increase of between 5 and 25 cents per pay period, depending on an individual's membership category.

AFSA's policy is to increase dues by an amount correlating to the third-quarter Consumer Price Index increase published by the Department of Labor, which is used by the Social Security Administration to calculate the next year's Cost-of-Living Adjustment increases.

This increase will provide the association with a stable and predictable income source, which allows AFSA to continue offering excellent member services and advance member priorities.

Active-duty and retired members paying dues via payroll and annuity deduction will see a small, automatic increase in the amount automatically deducted from their paychecks and annuities. Those paying annually will be billed the new rate on their regularly scheduled renewal date. ■

Active Duty				
Foreign Service Grades	2015 Annual	2015 Biweekly	Annual Increase	Deduction Increase
SFS	\$397.60	\$15.30	\$6.65	\$0.25
FS 1-3	\$307.40	\$11.80	\$5.15	\$0.15
FS 4-6	\$176.00	\$6.75	\$2.95	\$0.10
FS 7-9	\$93.05	\$3.60	\$1.55	\$0.10
Retiree				
Annuity Level	2015 Annual	2015 Monthly	Annual Increase	Deduction Increase
Under \$25,000	\$68.30	\$5.70	\$1.15	\$0.10
\$25,000-50,000	\$107.30	\$8.95	\$1.80	\$0.15
\$50,000-75,000	\$143.30	\$11.95	\$2.40	\$0.20
Over \$75,000	\$179.40	\$14.95	\$3.00	\$0.25
Retiree Spouse/Partner	\$53.65	\$4.45	\$0.90	\$0.05
Associate				
Category	2015 Annual		Annual Increase	
Associate Membership	\$110.25		\$1.85	
Retired Associate	\$67.50		\$1.15	

### ANNOUNCEMENT

#### NOMINATION DEADLINE APPROACHING: AFSA EXEMPLARY PERFORMANCE AWARDS

AFSA is accepting nominations for its five awards recognizing exemplary performance until the **Feb. 28** deadline. We urge members to nominate someone whose contribution has made a difference.

The **Nelson B. Delavan Award** recognizes the work of a Foreign Service Office Management Specialist.

The **M. Juanita Guess Award** is conferred on a Community Liaison Office Coordinator who has demonstrated outstanding leadership.

The **Avis Bohlen Award** honors the volunteer accomplishments of a family member of a Foreign Service employee at post.

The **AFSA Achievement and Contributions to the Association Award** is for active-duty and retired members of AFSA.

The **Post Rep of the Year Award** honors a post representative who best demonstrates sustained and successful engagement with AFSA membership at post.

Recipients are presented with a monetary prize and are honored at a ceremony in June in the Benjamin Franklin Diplomatic Reception Room at the State Department.

For details on the awards and to file a nomination online, go to [www.afsa.org/performance](http://www.afsa.org/performance). Contact Special Awards and Outreach Coordinator Perri Green at [green@afsa.org](mailto:green@afsa.org) or (202) 719-9700 for more information.

### NEWS BRIEF

#### FINDING THE FSJ ONLINE

"FS Know-How" articles have covered such topics as organizational tips for traveling, advice for spouses and coping mechanisms, to name just a few, and give useful advice for dealing with life in the Foreign Service. "FS Know-How" columns can be found at [www.afsa.org/fsknowhow](http://www.afsa.org/fsknowhow).

"Speaking Out" is a space for FS members to bring up concerns about or express opinions on Foreign Service issues. Recent columns have addressed the role of Foreign Service specialists, minority representation and ambassadorial qualifications. Go to [www.afsa.org/speakingout](http://www.afsa.org/speakingout) to read this collection.

These resources will be updated every time a new article is published in *The Foreign Service Journal*. We also encourage submissions to each of these columns; please send your contributions to [journal@afsa.org](mailto:journal@afsa.org). For details see the FSJ author guidelines at [www.bit.ly/FSJ\\_submission](http://www.bit.ly/FSJ_submission).

—Sarah Kay, Communications Intern

## FAMILY MEMBER MATTERS

## A Daughter Reflects on Foreign Service Life

BY MAGGIE ANTONIJEVIC

*Maggie Antonijevic was born in Kinshasa, Democratic Republic of the Congo—when it was still known as Zaire—while her father was on his first assignment with USAID. She grew up in Haiti, Mali and Jamaica, and spent summers with her father in Guinea and Kenya while in college. As a child, starting in second grade, she kept journals about life overseas, which she still has stacked in her closet. Now she enjoys writing outside of her journals and is overwhelmed with gratitude for the unique life the Foreign Service gave to her. Maggie currently lives with her family in Chicago, where she teaches kindergarten. She wrote this reflection about her father, USAID FSO David Atteberry.*

Foreign Service folk are accustomed to saying goodbye. Life in the Foreign Service demands that we leave friends, family and homes countless times.

I grew up in the Foreign

Service, following my father from post to post. This career choice requires monumental sacrifice. Beyond the glamour of exotic homes and international travel, there has been a current of sadness in our lives: relationships lost or broken from years of being uprooted.

As I became older, I wondered why. Is this lifetime of saying goodbye worth it? Then I would hear my father talk about his chosen profession.

His voice would shake; he would close his eyes and take deep breaths. He would say to me, “If I’m not helping others have a better life, then what am I doing with my life?”

He would continue: “We are so lucky to be born somewhere we could go to school, have clothes to wear, clean water to drink and enough food to eat. These are simple things that so many people on this planet don’t have.”



COURTESY OF MAGGIE ANTONIJEVIC

The author and her father in Haiti in the mid-1980s.

I understood, and I still do. The Foreign Service is not an easy calling. I have been sharing my dad with the Foreign Service my whole life, saying goodbye to him almost as quickly as we greet each other for a visit.

My father grew up in Texas. He remembers the Texas heat as he tore through *National Geographic*, eager to read about the world at large. After a childhood spent in the suburbs of Dallas, he wondered: Why is there so much inequality? Why do people discriminate against each other based on race and class? Why do some people have so much and others so little?

He grew into a curly-haired man who loved the Beatles and cute girls and wanted to help make the world a better place. One evening in the

1970s, he announced: “Mom, Dad, I’m moving to Central Africa.”

The response was “You are moving where?”

My father joined the Peace Corps and then the USAID Foreign Service. In his 33-year career he has served in Zaire, Haiti, Mali, Jamaica, Guinea, Ghana and Nepal.

Now, as he contemplates his next post, I have a message for him and for every Foreign Service man or woman nearing retirement, especially those brave enough to have raised their children overseas.

I hope you take this message with you: Yes, you made me leave my friends and guaranteed that I would start over in school every three years and worry if Santa Claus would find us. But your work changed my heart; it taught me compassion and courage in a way I can never repay.

Beyond what your career choice did for me, hundreds living in villages, towns and cities around the world will see better days because of you and your amazing work.

I know how lucky I am to have been raised in the midst of such magnificent human power and imagination conspiring to make the world a better place. Congratulations, Dad, on a job well done.

So when you are lying on the sand with your face up to the sun, as retirement life surrounds you, never forget what you have done.

The world is a better place because of you. ■



COURTESY OF MAGGIE ANTONIJEVIC

FSO David Atteberry with local residents at his post in Nepal.



## Federal and State Tax Provisions for the Foreign Service

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

Foreign Service employees most frequently ask AFSA about home ownership, tax liability upon sale of a residence and state of domicile. We have devoted special sections to these issues. James Yorke (YorkeJ@state.gov), who compiles the tax guide, would like to thank M. Bruce Hirshorn, Foreign Service tax counsel, for his help in its preparation.

### FEDERAL TAX PROVISIONS

For 2014 the six tax rates for individuals remain at 10, 15, 25, 28, 33, 35 and 39.6 percent. The 10-percent rate is for taxable income up to \$18,151 for married couples, \$9,076 for singles. The 15-percent rate is for income



ISTOCK.COM/RETROCKEET

up to \$73,801 for married couples, \$36,901 for singles. The 25-percent rate is for income up to \$148,851 for married couples, \$89,351 for singles. The 28-percent rate is for income up to \$226,851 for married couples and up to \$186,351 for singles. The 33-percent rate is for income up to \$405,101 for married couples and singles. Annual income above \$405,101 is taxed at 35 percent. Income above \$450,000 for married couples and above \$400,000 for singles is taxed at 39.6 percent.

Although long-term capital gains are taxed at a maximum rate of up to 15

percent and are reported on Schedule D, married taxpayers with income greater than \$450,000 and singles greater than \$400,000 pay a capital gains rate of 20 percent. These rates are effective for all sales in 2014, except for those people who fall within the 10- to 15-percent tax bracket: their rate is either 0 or 5 percent. Long-term capital gain is defined as gain from the sale of property held for 12 months or longer.

Also for 2014, since the Supreme Court decision on same-sex marriages, same-sex couples who were married before Dec. 31, 2013, in a state where it is legal must now file their federal tax return either as married filing separately or married filing jointly, not single.

### Personal Exemption

For each taxpayer, spouse and dependent the personal exemption is \$3,950. There is

a personal exemption phase-out starting in 2014.

### Foreign Earned Income Exclusion

Many Foreign Service spouses and dependents work in the private sector overseas and thus are eligible for the Foreign Earned Income Exclusion. American citizens and residents living and working overseas are eligible for the income exclusion, unless they are employees of the United States government. The first \$99,200 earned overseas as an employee or as self-employed may be exempt from income taxes.

To receive the exemption, the taxpayer must meet one of two tests: 1) the Physical Presence Test, which requires that the taxpayer be present in a foreign country for at least 330 full (midnight to midnight) days during any 12-month period (the

# 2014 AFSA TAX GUIDE

### PLEASE NOTE

This guidance applies to the 2014 tax year, for returns due on April 15, 2015. Please bear in mind that while there may be changes to the tax code for the 2015 tax year, we are not aware at present of any possible changes that are likely to apply to 2014.



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period may be different from the tax year); or 2) the Bona Fide Residence Test, which requires that the taxpayer has been a bona fide resident of a foreign country for an uninterrupted period that includes an entire tax year.

Most Foreign Service spouses and dependents qualify under the Bona Fide Residence test, but they must wait until they have been overseas for a full calendar year before claiming it. Keep in mind that self-employed taxpayers must still pay self-employment (Social Security and Medicare) tax on their foreign-earned income. Only the income tax is excluded.

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

### Extension for Taxpayers Abroad

Taxpayers whose tax home is outside the U.S. on April 15 are entitled to an automatic extension until June 15 to file their returns. When filing the return, these taxpayers should write "Taxpayer Abroad" at the top of the first page and attach a statement of explanation. There are no late filing or late payment penalties for returns filed and

taxes paid by June 15, but the IRS does charge interest on any amount owed from April 15 until the date it receives payment.

### Standard Deduction

The standard deduction is given to non-itemizers. For couples, the deduction is now \$12,400, and for singles, \$6,200. Married couples filing separately get a standard deduction of \$6,200 each, and head-of-household filers receive a \$9,100 deduction. An additional amount is allowed for taxpayers over age 65 and for those who are blind.

Most unreimbursed employee business expenses must be reported as miscellaneous itemized deductions, which are subject to a threshold of 2 percent of Adjusted Gross Income. These include professional dues and subscriptions to publications; employment and educational expenses; home office, legal, accounting, custodial and

tax preparation fees; home leave, representational and other employee business expenses; and contributions to AFSA's Legislative Action Fund. Unreimbursed moving expenses (including unreimbursed expenses incurred in moving pets) are an adjustment to income, which means that you may deduct them even if you are taking the standard deduction. However, the deduction includes only the unreimbursed transportation, storage and travel costs of moving your possessions and yourself and your family to the new location; it does not include meals.

Medical expenses (including health and long-term care insurance, but not health insurance premiums deducted from government salaries) are now subject to a threshold of 10 percent of Adjusted Gross Income, unless the taxpayer is over 65, in which case it remains

at 7.5 percent until 2017, after which it rises to 10 percent. This means that to be deductible, the medical cost would have to exceed \$3,000 for a taxpayer with a \$30,000 AGI. There is a reduction of itemized deductions for higher income taxpayers for 2014.

State and local income taxes and real estate and personal property taxes remain fully deductible for itemizers, as are charitable contributions to U.S.-based charities for most taxpayers (donations to overseas charitable organizations such as local churches at post, are not deductible).

Donations to the AFSA Scholarship Fund and the Fund for American Diplomacy are fully deductible as charitable contributions, as are donations to AFSA via the Combined Federal Campaign. Individuals may also dispose of any profit from the sale of personal property abroad in this manner.

### IMPORTANT NOTE: FOREIGN EARNED INCOME

The Foreign Earned Income Exclusion allows U.S. citizens who are not United States government employees and are living outside the U.S. to exclude up to \$99,200 of their 2014 foreign-source income if they meet certain requirements. Since 2006, you have been required to take your total income and figure what your tax would be, then deduct the tax that you would have paid on the excludable income.

For example: a Foreign Service employee earns \$80,000 and their teacher spouse earns \$30,000.

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

**Since 2006:** Tax on \$110,000 = \$20,615; tax on \$30,000 = \$3,749; total tax = \$20,615 minus \$3,749 = tax bill of \$16,866.

For 2014 tax returns, any interest paid on auto or personal loans, credit cards, department stores and other personal interest will not be allowed as itemized deductions. If such debts are consolidated, however, and paid with a home equity loan, interest on the home equity loan is deductible. Interest on educational loans will be allowed as an adjustment to gross income. Mortgage interest is still, for the most part, fully deductible. Interest on loans intended to finance investments is deductible up to the amount of net income from investments. Interest on loans intended to finance a business is 100-percent deductible. Passive-investment interest on investments in which the taxpayer is an inactive participant (i.e., a limited partnership) can be deducted only from the income produced by other passive activities. Interest on loans that do not fall into the above categories, such as money borrowed to buy tax-exempt securities, is not deductible.

### Home Leave Expenses

Employee business expenses, such as home leave and unreimbursed representation, may be listed as miscellaneous itemized deductions and claimed on Form 2106. In addition to the 2-percent floor, only 50 percent for meals and entertainment may be claimed (100 percent

for unreimbursed travel and lodging). Only the employee's (not family members') home leave expenses are deductible. AFSA recommends maintaining a travel log and retaining a copy of home leave orders, which will help if the IRS ever questions claimed expenses. It is important to save receipts: without receipts for food, a taxpayer may deduct only the federal meals-and-incidentals (M&IE) per diem rate at the home leave address, no matter how large the grocery or restaurant bill. Lodging is deductible, as long as it is not with friends or relatives, or in one's own home.

The IRS will disallow use of per diem rates and any expenses claimed for family members. If a hotel bill indicates double rates, the single room rate should be claimed; and, if possible, the hotel's rate sheet should be saved for IRS scrutiny. Car rental, mileage and other unreimbursed travel expenses, including parking fees and tolls, may be deducted. The

rate for business miles driven is 56 cents for 2014. Those who use this optional mileage method need not keep detailed records of actual vehicle expenses. They must, however, keep a detailed odometer log to justify the business use of the vehicle and track the percentage of business use. This optional mileage method applies to leased vehicles, as well.

### Official Residence Expenses

For ORE, the only expenses that are deductible are those above the 3.5 percent paid out of pocket. Since Oct. 1, 1990, employees who receive official residence expenses have not been allowed to reduce their reportable income by 3.5 percent. An IRS ruling in 1990 states that "usual expenses," defined as 3.5 percent of salary, are not deductible. These expenses can be deducted as miscellaneous business expenses.

### Home Ownership

Individuals may deduct

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

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

### CHILD CARE TAX CREDIT WHEN OVERSEAS

Bear in mind that in order to claim the Child Care Tax Credit while serving overseas, you must submit IRS Form 2441, for which the instructions say: "For U.S. citizens and resident aliens living abroad, your care provider may not have, and may not be required to get, a U.S. taxpayer identification number (for example, an SSN or EIN). If so, enter 'LAFCP' (Living Abroad Foreign Care Provider) in the space for the care provider's taxpayer identification number."





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### Rental of Home

Taxpayers who rented out their homes in 2014 can continue to deduct mortgage interest as a rental expense. Also deductible are property management fees, condo fees, depreciation costs, taxes and all other rental expenses. Losses up to \$25,000 may be offset against other income, as long as the Modified Adjusted Gross Income does not exceed \$100,000 to \$150,000 and the taxpayer is actively managing the property.

Note that a taxpayer who retains a property manager does not lose this benefit, as this is still considered active management of the property. All passive losses that cannot be deducted

currently are carried forward and deducted in the year the property is sold.

### Sale of a Principal Residence

Current tax laws allow an exclusion of up to \$500,000 for couples filing jointly and up to \$250,000 for single taxpayers on the long-term gain from the sale of their principal residence. One need not purchase another residence to claim this exclusion. All depreciation taken after May 7, 1997, will, however, be recaptured (added to income) at the time of sale and taxed at 25 percent. Since January 2009, gain from the sale of a home can no longer be excluded from gross income for periods when it was rented out before

you occupied it as a principal residence for the first time. The only qualification for the capital-gains exclusion is that the house sold must have been owned and occupied by the taxpayer as his or her principal residence for at least two of the last five years prior to the date of the sale.

### Military Families Tax Relief Act

As a result of the Military Families Tax Relief Act of 2003, the five-year period may be extended for members of the Foreign Service by any period during which the taxpayer has been away from the area on a Foreign Service assignment, up to a maximum of 15 years (including the five years). There are some exceptions

to the two-year occupancy requirement, including a sale due to a "change in place of employment" (this would include foreign transfers). This exclusion is not limited to a once-in-a-lifetime sale, but may be taken once every two years.

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

Temporary rental of the home does not disqualify one from claiming the exclusion. The 2003 law requires only that you have occupied the house as your principal residence for the required period (two years out of five, extended). However, new legislation in 2009 requires that the "two years out of five (extended)" cannot start until the date the home is occupied as a principal residence for the first time.

Under Internal Revenue Code Section 1031, taxpayers whose U.S. home may no longer qualify for the principal residence exclusion may be eligible to replace the property through a "tax-free exchange" (the so-called Starker Exchange). In essence, one property being rented out may be exchanged for another, as long as that one is also

### TAX WITHHOLDING WHEN ASSIGNED DOMESTICALLY

The State Department has instituted new procedures to comply with U.S. Treasury regulations for withholding state taxes for all employees serving domestically. (See Department Notice 2014\_11\_016, dated Nov. 3, 2014.)

As a general rule, state taxes will be withheld for an employee's "regular place of duty"—in other words your official duty station. Those employees for whom the Controller General of Financial Services has identified state tax inconsistencies were notified late in 2014.

Bear in mind that this does not mean that you must relinquish your state of domicile, if it is different than your official duty station. "Domicile" (legal residence) is different from "residence" and so long as you maintain your ties to your home state you will be able to change your withholdings, if you so wish, back to your home state when you go overseas again. See the Overseas Briefing Center's guide to Residence and Domicile, available on AFSA's website at [www.afsa.org/domicile](http://www.afsa.org/domicile).

Bear in mind, too, that CGFS will not adjudicate state income tax elections when you are serving overseas, since in those circumstances it is the employee's responsibility to accurately elect state income taxes. However, on the employee's return to a domestic assignment, CGFS will evaluate the employee's state tax withholding election based on his or her new official domestic duty station.

rented. In exchanging the properties, capital-gains tax may be deferred. Technically, a simultaneous trade of investments occurs. Actually, owners first sign a contract with an intermediary to sell their property, hold the cash proceeds in escrow, identify in writing within 45 days the property they intend to acquire, and settle on the new property within 180 days, using the money held in escrow as part of the payment. It is important to emphasize that the exchange is from one investment property to another investment property—the key factor in the IRS evaluation of an exchange transaction is the intent of the investor at the time the exchange was consummated. The IRS rules for these exchanges are complex and specific, with a number of pitfalls that can nullify the transaction. An exchange should never be attempted without assistance from a tax lawyer specializing in this field.

### Calculating Your Adjusted Basis

Many Foreign Service employees ask what items can be added to the cost basis of their homes when they are ready to sell. Money spent on fixing up the home for sale may be added to the basis. To qualify as legitimate fixing-up costs, the following conditions must be met: 1) the expenses must be for

work performed during the 90-day period ending on the day on which the contract to sell the old residence was signed; 2) the expenses must be paid on or before the 30th day after sale of the house; and 3) the expenses must not be capital expenditures for permanent improvements or replacements (these can be added to the basis of the property, the original purchase price, thereby reducing the amount of profit). A new roof and kitchen counters are not “fix-up” items, but painting the house, cleaning up the garden and making minor repairs qualify.

### The Affordable Care Act

The Affordable Care Act imposed two new tax increases beginning in 2013. There is a 3.8-percent net investment tax on net investment income to the extent it is in excess of modified adjusted gross income of \$250,000 for those married filing jointly, and \$200,000 for those filing singly. Net investment income includes interest, dividends, rents, royalties, pensions and annuities, and gain from the sale of property. Secondly, the rate of the Medicare tax that is withheld from employees' paychecks is increased by 0.9 percent on salaries or self-employment earnings over the same thresholds.

## STATE TAX PROVISIONS

**Liability:** Every employer, including the State Department, is required to withhold state taxes for the location where the employee either lives or works. Employees serving overseas, however, must maintain a state of domicile in the United States where they may be liable for income tax; the consequent tax liability that the employee faces will vary greatly from state to state. In addition, the many laws on taxability of Foreign Service pensions and annuities also vary by state. This section briefly covers both those situations.

### Domicile and Residency

There are many criteria used in determining which state is a citizen's domicile. One of the strongest determinants is prolonged physical presence, a standard that Foreign Service personnel frequently cannot meet because of overseas service requirements. In such cases, the states will make a determination of the individual's income-tax status based on other factors, including where the individual has family ties, has been filing resident tax returns, is registered to vote, has a driver's license, owns property, or where the person has bank accounts or other financial holdings.

In the case of Foreign Ser-

vice employees, the domicile might be the state from which the person joined the Service, where his or her home leave address is, or where he or she intends to return upon separation. For purposes of this article, the term “domicile” refers to legal residence; some states also define it as permanent residence. “Residence” refers to physical presence in the state. Foreign Service personnel must continue to pay taxes to the state of domicile (or to the District of Columbia) while residing outside of the state, including during assignments abroad, unless the state of residence does not require it.

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](http://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, for instance, continuing to



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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, since in some cases the D.C. and Virginia tax authorities have sought back taxes from those who have used this address.

See the box on p. 58 for new procedures within the State Department for state tax withholdings.

### States That Have No Income Tax

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

### States That Do Not Tax Non-Resident 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 (see entry for Pennsylvania below) and West Virginia. The requirements for all except California, Idaho,

Minnesota and Oregon are that the individual not have a permanent “place of abode” in the state, have a permanent “place of abode” outside the state, and not be physically present for more than 30 days during the tax year. California allows up to 45 days in the state during a tax year.

All these 10 states require the filing of non-resident 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.

“State Overviews” and “State Pension and Annuity Tax” sections below give brief state information on tax liability, with addresses provided to get further information or tax forms. Tax rates are provided where possible. As always, members are advised to double-check with their state’s tax authorities. While AFSA makes every attempt to provide the most up-to-date information, readers with specific questions should consult a tax expert in the state in question at the addresses given. We provide the website address for each in the state-by-state guide, and an email address or link where available. Some states do not offer email customer service. We also recommend the Federation of Tax Administrators’ website, [www.taxadmin.org](http://www.taxadmin.org), which provides much useful information on individual state income taxes.

## STATE OVERVIEWS

### ALABAMA

Individuals domiciled in Alabama are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. Alabama’s individual income tax rates range from 2 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, P.O. Box 327005, Montgomery AL 36132-7005.

Phone: (334) 242-1512.

Email: Link through the website, “About Us,” then “Contacts,” then “Income Tax.”

Website: [www.ador.state.al.us](http://www.ador.state.al.us)

### 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.

Write: State Office Building, 333 West Willoughby Ave., 11th Floor, P.O. Box 110420, Juneau AK 99811-0420.

Phone: (907) 465-2320.

Website: [www.tax.state.ak.us](http://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 \$300,000 for married filing jointly or \$150,000 for single filers.

Write: Arizona Department of Revenue, Taxpayer Information & Assistance, P.O. Box 29086, Phoenix AZ 85038-9086.

Phone: (602) 255-3381.

Email: For general questions: [taxpayerassistance@azdor.gov](mailto:taxpayerassistance@azdor.gov)  
Website: [www.azdor.gov](http://www.azdor.gov)

### ARKANSAS

Individuals domiciled in Arkansas are considered residents and are taxed on their entire income regardless of their physical presence in the state. The Arkansas tax rate ranges in six brackets from a minimum of 2.5 percent to a maximum of 7 percent of net



taxable income over \$34,600.

Write: Department of Finance and Administration, Income Tax Section, P.O. Box 3628, Little Rock AR 72203-3628.

Phone: (501) 682-1100.

Email: Use Contact Form on "Contact Us" page.

Website: [www.arkansas.gov/dfa](http://www.arkansas.gov/dfa)

## CALIFORNIA

Foreign Service employees domiciled in California must establish non-residency 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 non-resident. This applies to most FS employees and their spouses, but members domiciled in California are advised to study FTB Publication 1031 for exceptions and exemptions. The California tax rate for 2014 ranges in five brackets from 1 percent of taxable income to a maximum of \$4,479.42 plus 9.3 percent of the excess over \$191,738 for married filing jointly or over \$50,869 for singles. For taxable income over \$259,844 for singles and \$519,688 for joint filers, there are three further steps up to a maximum of 12.3 percent. Non-resident domiciliaries are advised to file on Form 540NR.

Write: Personal Income Taxes, Franchise Tax Board, P.O. Box 942840, Sacramento CA 94240-0040.

Phone: toll-free (800) 852-5711 (inside the U.S.); (916) 845-6500 (outside the U.S.).

Email: Link through the website's "Contact Us" tab.

Website: [www.ftb.ca.gov](http://www.ftb.ca.gov)

## COLORADO

Individuals domiciled in Colorado are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. Colorado's tax rate is a flat 4.63 percent of federal taxable income plus or minus allowable modifications.

Write: Department of Revenue, Taxpayer Service Division, P.O. Box 17087 Denver, CO 80217-0087.

Phone: (303) 238-7378.

Email: Link through the website's "Contact Us" tab on the "Taxes" tab.

Website: [www.colorado.gov/revenue](http://www.colorado.gov/revenue)

## CONNECTICUT

Connecticut domiciliaries may qualify for non-resident tax treatment under either of two exceptions as follows: Group

A: the domiciliary 1) did not maintain a permanent place of abode inside Connecticut for the entire tax year; and 2) maintains a permanent place of abode outside the state for the entire tax year; and 3) spends not more than 30 days in the aggregate in the state during the tax year. Group B: the domiciliary 1) In any period of 548 consecutive days, is present in a foreign country for at least 450 days; and 2) during the 548-day period, is not present in Connecticut for more than 90 days; and 3) does not maintain a permanent place of abode in the state at which the domiciliary's spouse or minor children are present for more than 90 days. Connecticut's tax rate for married filing jointly rises from 3 percent on the first \$20,000, in six steps to 6.7 percent of the excess over \$500,000. For singles it is 3 percent on the first \$10,000, rising in six steps to 6.7 percent of the excess over \$250,000.

Write: Department of Revenue Services, Taxpayer Services Division, 25 Sigourney St., Suite 2, Hartford CT 06106-5032.

Phone: (860) 297-5962.

Email: Contact through the "Contact us" page on the website.

Website: [www.ct.gov/drs](http://www.ct.gov/drs)

## DELAWARE

Individuals domiciled in Delaware are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. Delaware's graduated tax rate rises in six steps from 2.2 percent of taxable income under \$5,000 to 6.75 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.

Email: [personaltax@state.de.us](mailto:personaltax@state.de.us)

Website: [www.revenue.delaware.gov](http://www.revenue.delaware.gov)

## DISTRICT OF COLUMBIA

Individuals domiciled in the District of Columbia are considered residents and are subject to tax on their entire income regardless of their physical presence there. Individuals domiciled elsewhere are also considered residents for tax purposes for the portion of any calendar year in which they are physically present in the District for 183 days or more. The District's tax rate is 4 percent if income is less than \$10,000; \$400 plus 6 percent of excess over \$10,000 if between \$10,000 and \$40,000; \$2,200 plus 8.5 percent of excess over \$40,000; and \$28,550 plus 8.95 percent of any excess above \$350,000.

Write: Office of Tax and Revenue, Customer Service Center, 1101 4th St. SW, Suite W270, Washington DC 20024.



## 2014 AFSA TAX GUIDE

Phone: (202) 727-4829.  
Email: [taxhelp@dc.gov](mailto:taxhelp@dc.gov)  
Website: [www.cfo.washingtondc.gov/cfo/site/default.asp](http://www.cfo.washingtondc.gov/cfo/site/default.asp)

### FLORIDA

Florida does not impose personal income, inheritance, gift or intangible personal property taxes. 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.

Write: Taxpayer Services, Florida Department of Revenue, 5050 W. Tennessee St., Bldg. L, Tallahassee FL 32399-0100.  
Phone: toll-free (800) 352-3671, or (850) 488-6800.  
Email: Link through website. Go to "Taxes," then "Tax Information," then "Questions?"  
Website: [dor.myflorida.com/dor/taxes/](http://dor.myflorida.com/dor/taxes/)

### 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 6 percent of taxable income of \$10,000 and above for joint married filers and \$7,000 for single filers.

Write: Georgia Department of Revenue, Taxpayer Services Division, 1800 Century Blvd. N.E., Atlanta GA 30345-3205.  
Phone: (877) 423-6711 Option #2.  
Email: [taxpayer.services@dor.ga.gov](mailto:taxpayer.services@dor.ga.gov)  
Website: [dor.georgia.gov/taxes](http://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. 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 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: toll-free (800) 222-3229, or (808) 587-4242.  
Email: [Taxpayer.Services@hawaii.gov](mailto:Taxpayer.Services@hawaii.gov)  
Website: [www.tax.hawaii.gov](http://www.tax.hawaii.gov)

### IDAHO

Individuals domiciled in Idaho for an entire tax year are considered residents and are subject to tax on their entire income. However, you are considered a non-resident if:

1) you are an Idaho resident who lived outside of Idaho for at least 445 days in a 15-month period; and 2) after satisfying the 15-month period, you spent fewer than 60 days in Idaho during the year; and 3) you did not have a personal residence in Idaho for yourself or your family during any part of the calendar year; and 4) you did not claim Idaho as your federal tax home for deducting away-from home expenses on your federal return; and 5) you were not employed on the staff of a U.S. senator; and 6) you did not hold an elective or appointive office of the U.S. government other than the armed forces or a career appointment in the U.S. Foreign Service (see Idaho Code Sections 63-3013 and 63-3030). In 2014 Idaho's tax rate rises in eight steps from a minimum of 1.6 percent to a maximum 7.4 percent on the amount of Idaho taxable income over \$10,718 for singles and \$21,436 for married filers. A non-resident must file an Idaho income tax return if his or her gross income from Idaho sources is \$2,500 or more.

Write: Idaho State Tax Commission, P.O. Box 36, Boise ID 83722-0410.  
Phone: (208) 334-7660 or toll-free (800) 972-7660.  
Email: [taxrep@tax.idaho.gov](mailto:taxrep@tax.idaho.gov)  
Website: [www.tax.idaho.gov](http://www.tax.idaho.gov)

### ILLINOIS

Individuals domiciled in Illinois are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. The Illinois tax rate is a flat 5 percent of Illinois taxable income for 2014.

Write: Illinois Department of Revenue, P.O. Box 19001, Springfield IL 62794-9001.  
Phone: toll-free (800) 732-8866, or (217) 782-3336.  
Email: Link through the website's "Contact Us," then "Taxpayer Answer Center."  
Website: [www.revenue.state.il.us](http://www.revenue.state.il.us)

### INDIANA

Individuals domiciled in Indiana are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. Indiana's tax rate is a flat 3.4 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 7207, Indianapolis IN 46207-7207.  
Phone: (317) 232-2240.  
Email: Link through the website's "Contact Us" tab.  
Website: [www.in.gov/dor](http://www.in.gov/dor)

## IOWA

Individuals domiciled in Iowa are considered residents and are subject to tax on their entire income to the extent that income is taxable on the person's federal income tax returns. Iowa's 2014 tax rate rises in nine steps from 0.36 percent to a maximum 8.98 percent of taxable income over \$68,175, depending on income and filing status.

Write: Taxpayer Services, Iowa Department of Revenue, P.O. Box 10457, Des Moines IA 50306-0457.

Phone: (515) 281-3114.

Email: [idr@iowa.gov](mailto:idr@iowa.gov)

Website: [www.iowa.gov/tax](http://www.iowa.gov/tax)

## KANSAS

Individuals domiciled in Kansas are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. In 2014 the Kansas tax rate is 2.7 percent on Kansas taxable income under \$15,000 for single filers and under \$30,000 for joint filers, and 4.8 percent on income over those amounts.

Write: Kansas Taxpayer Assistance Center, Room 150, 915 SW Harrison, Topeka KS 66612.

Phone: (785) 368-8222.

Email: [tac@kdor.ks.gov](mailto:tac@kdor.ks.gov)

Website: [www.ksrevenue.org](http://www.ksrevenue.org)

## KENTUCKY

Individuals domiciled in Kentucky are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. Kentucky's tax rate ranges from 2 percent on the first \$3,000 of taxable income to 6 percent on all taxable income over \$75,000.

Write: Kentucky Department of Revenue, Frankfort KY 40602.

Phone: (502) 564-4581.

Email: Link through the website's "Contact Us" tab.

Website: [www.revenue.ky.gov](http://www.revenue.ky.gov)

## LOUISIANA

Individuals domiciled in Louisiana are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. Louisiana's tax rate rises from 2 percent for the first \$12,500 for single filers or \$25,000 for joint filers; in three steps to 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: (855) 307-3893.

Email: Link through the website's "Contact LDR Online tab."

Website: [www.revenue.louisiana.gov](http://www.revenue.louisiana.gov)

## 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 non-residents if they satisfy all three of the following conditions: 1) they did not maintain a permanent place of abode in Maine for the entire taxable year; 2) they maintained a permanent place of abode outside Maine for the entire taxable year; and 3) they spent no more than 30 days in the aggregate in Maine during the taxable year. Under the Foreign Safe Harbor provision, Maine domiciliaries are treated as non-residents if they are present in a foreign country for 450 days in a 548-day period and do not spend more than 90 days in Maine during that period. Maine's tax rate in 2014 is 6.5 percent on Maine taxable income over \$5,200 for singles and \$10,450 for joint filers and 7.95 percent over \$20,900 for singles and \$41,850 for married filing jointly.

Write: Maine Revenue Services, Income Tax Assistance, P.O. Box 9107, Augusta ME 04332-9107.

Phone: (207) 626-8475.

Email: [income.tax@maine.gov](mailto:income.tax@maine.gov)

Website: [www.maine.gov/revenue](http://www.maine.gov/revenue)

## MARYLAND

Individuals domiciled in Maryland are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. Individuals domiciled elsewhere are also considered residents for tax purposes for the portion of any calendar year in which they are physically present in the state for an aggregated total of 183 days or more. Maryland's tax rate is \$90 plus 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 \$12,760 plus 5.75 percent of the excess of taxable income over \$250,000 for singles or \$15,072 plus 5.75 percent of the excess 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 1.25 percent in Worcester County to 3.2 percent in Baltimore City, and in Montgomery, Prince George's and Howard counties (see website for details for all counties).





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Write: Comptroller of Maryland, Revenue Administration Center, Taxpayer Service Section, Annapolis MD 21411-0001.  
Phone: (410) 260-7980, or toll-free (800) 638-2937.  
Email: [taxhelp@comp.state.md.us](mailto:taxhelp@comp.state.md.us)  
Website: [www.marylandtaxes.com](http://www.marylandtaxes.com)

### MASSACHUSETTS

Individuals domiciled in Massachusetts are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. Salaries and most interest and dividend income are taxed at a flat rate of 5.2 percent. Some income (e.g., short-term capital gains) is taxed at 12 percent.

Write: Massachusetts Department of Revenue, Taxpayer Services Division, P.O. Box 7010, Boston MA 02204.  
Phone: (617) 887-6367.  
Email: Link through the website's "Contact Us" tab.  
Website: [www.mass.gov/dor/](http://www.mass.gov/dor/)

### 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 1- or 2-percent income tax. Detroit imposes an additional 2.5-percent tax.  
Write: Michigan Department of Treasury, Lansing MI 48922.  
Phone: toll-free (517) 373-3200.  
Email: [treasIndTax@michigan.gov](mailto:treasIndTax@michigan.gov)  
Website: [www.michigan.gov/treasury](http://www.michigan.gov/treasury)

### MINNESOTA

Individuals domiciled in Minnesota are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. Minnesota's tax rate in 2014 is 5.35 percent on taxable income over \$24,680 for singles or \$36,080 for married joint filers, rising in three steps to a maximum of 9.85 percent on taxable income over \$152,541 for single filers or \$254,241 for married filing jointly.  
Write: Minnesota Department of Revenue, 600 North Robert St., St. Paul MN 55146-5510.  
Phone: (651) 296-3781.  
Email: [individual.incometax@state.mn.us](mailto:individual.incometax@state.mn.us)  
Website: [www.taxes.state.mn.us](http://www.taxes.state.mn.us)

### MISSISSIPPI

Individuals domiciled in Mississippi are considered residents and are subject to tax on their entire income regardless of

their physical presence in the state. Mississippi's tax rate is 3 percent on the first \$5,000 of taxable income, 4 percent on the next \$5,000 and 5 percent on taxable income over \$10,000 for all taxpayers, whether filing singly or jointly.  
Write: Department of Revenue, P.O. Box 1033, Jackson MS 39215-1033.

Phone: (601) 923-7000.

Email: Link through the website's "Contact Us" tab.  
Website: [www.dor.ms.gov](http://www.dor.ms.gov)

### MISSOURI

An individual domiciled in Missouri is considered a non-resident, and is not liable for tax on Missouri income if the individual has no permanent residence in Missouri, has a permanent residence elsewhere and is not physically present in the state for more than 30 days during the tax year. Missouri calculates tax on a graduated scale up to \$9,000 of taxable income. Any taxable income over \$9,000 is taxed at a rate of \$315 plus 6 percent of the excess over \$9,000.

Write: Individual Income Tax, P.O. Box 2200, Jefferson City MO 65105-2200.

Phone: (573) 751-3505.

Email: [income@dor.mo.gov](mailto:income@dor.mo.gov)  
Website: [www.dor.mo.gov](http://www.dor.mo.gov)

### MONTANA

Individuals domiciled in Montana are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. Montana's tax rate for 2014 rises in six steps from 1 percent of taxable income under \$2,800 rising in seven steps to a maximum of 6.9 percent of taxable income over \$17,100. See the website for various deductions and exemptions.

Write: Montana Department of Revenue, P.O. Box 5805, Helena MT 59604.

Phone: (406) 444-6900.

Email: Link through the website's "Contact Us" tab.  
Website: [www.revenue.mt.gov/home](http://www.revenue.mt.gov/home)

### NEBRASKA

Individuals domiciled in Nebraska are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. The 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 \$27,000 for singles and \$54,000 for joint filers. If AGI is over \$250,000 for single filers or \$300,000 for joint filers an additional tax of

between 0.438 and 0.183 percent is imposed.

Write: Department of Revenue, 301 Centennial Mall South, P.O. Box 94818, Lincoln NE 68509-4818.

Phone: (402) 471-5729.

Email: Link through the website's "Contact Us" tab.

Website: [www.revenue.state.ne.us](http://www.revenue.state.ne.us)

## NEVADA

Nevada does not tax personal income. There is a sales-and-use tax that 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: (775) 684-2000.

Website: [www.tax.state.nv.us](http://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 an 8.5-percent tax on business profits, including sale of rental property. There is no inheritance tax.

Applicable taxes apply to part-year residents.

Write: Central Taxpayer Services, 109 Pleasant St., Concord NH 03301.

Phone: (603) 230-5000.

Website: [www.revenue.nh.gov](http://www.revenue.nh.gov)

## NEW JERSEY

A New Jersey domiciliary is considered a non-resident for New Jersey tax purposes if the individual has no permanent residence in New Jersey, has a permanent residence elsewhere and is not physically in the state for more than 30 days during the tax year. Filing a return is not required (unless the non-resident has New Jersey-source income), but it is recommended in order to preserve domicile status. Filing is required on Form 1040-NR for revenue derived from in-state sources. Tax liability is calculated as a variable lump sum plus a percentage from a minimum of 1.4 percent of taxable gross income up to \$20,000, 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.

Write: State of New Jersey, New Jersey Division of Taxation, Technical Information Branch, P.O. Box 281, Trenton NJ 08695-0281.

Phone: (609) 292-6400.

Email: Link through the website's "Contact Us" tab.

Website: [www.state.nj.us/treasury/taxation](http://www.state.nj.us/treasury/taxation)

## NEW MEXICO

Individuals domiciled in New Mexico are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. The basis for New Mexico's calculation is the Federal Adjusted Gross Income figure.

Rates rise from a minimum of 1.7 percent in four steps to a maximum of 5.3 percent on New Mexico taxable income over \$16,000 for single filers and \$24,000 for married filing jointly.

Write: New Mexico Taxation and Revenue Department, Tax Information and Policy Office, P.O. Box 25122 Santa Fe NM 87504-5122.

Phone: (505) 827-0700.

Email: Link through the website's "Email Us" tab.

Website: [www.tax.newmexico.gov](http://www.tax.newmexico.gov)

## NEW YORK

There is no tax liability for out-of-state income if the individual has no permanent residence in New York, has a permanent residence elsewhere and is not present in the state more than 30 days during the tax year. Filing a return is not required, but it is recommended to preserve domicile status. The tax rate rises in six steps from a minimum of 4 percent to 6.45 percent of taxable income over \$20,850 for single filers and \$41,800 for married filing jointly; 6.65 percent on taxable income over \$78,500 for single filers and \$156,900 for joint filers; 6.85 percent on taxable income over \$209,250 for single filers or \$313,850 for joint filers; and at 8.82 percent over \$1,046,350 for single filers and over \$2,092,800 for joint filers. In New York City the maximum rate is 3.648 percent over \$90,000 and 3.876 percent over \$500,000. 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 to be resident in NY State for tax purposes. See TSB-M-09(2)I of January 16, 2009 at [http://www.tax.ny.gov/pdf/memos/income/m09\\_2i.pdf](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.

Email: Link through the website's "Answer Center" tab.

Website: [www.tax.ny.gov](http://www.tax.ny.gov)



## 2014 AFSA TAX GUIDE

### 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 now charges a flat tax rate of 5.8 percent for tax year 2014, reducing to 5.75 percent for 2015. 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: toll-free (877) 252-3052. From overseas, call (252) 467-9000.

Website: [www.dornc.com](http://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 2014 the tax rate ranges in five steps from 1.22 percent on North Dakota taxable income up to \$36,250 for singles and \$60,650 for joint filers; 2.52 percent over \$87,850 for singles and over \$146,600 for joint filers; to a maximum of 3.22 percent on taxable income over \$398,350 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.

Email: Use email button against "Individual Income Tax" on "Contact Us" page.

Website: [www.nd.gov/tax](http://www.nd.gov/tax)

### OHIO

Individuals domiciled in Ohio are considered residents and their income is subject to tax, using the Federal Adjusted Gross Income figure as a starting base. Ohio's tax rate starts at a minimum of 0.534 percent on taxable income under \$5,200, rising in seven steps to a maximum of 5.392 percent on taxable income over \$208,500 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: toll-free (800) 282-1780 or (614) 387-0224.

Email: Link through the website's "Contact Us" tab.

Website: [www.tax.ohio.gov](http://www.tax.ohio.gov)

### OKLAHOMA

Individuals domiciled in Oklahoma are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. Oklahoma's tax rate rises in eight stages to a maximum of 5.25 percent on taxable income over \$8,700 for single filers and \$15,000 for married filing jointly.

Write: Oklahoma Tax Commission, Income Tax, P.O. Box 26800, Oklahoma City OK 73126-0800.

Phone: (405) 521-3160.

Email: [otcmaster@tax.ok.gov](mailto:otcmaster@tax.ok.gov)

Website: [www.tax.ok.gov](http://www.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 2014, Oregon's tax rate rises from 5 percent on taxable income over \$3,300 for single filers and over \$6,600 for married filing jointly, in three steps

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Website: [www.irvingcom.com](http://www.irvingcom.com)



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: (503) 378-4988.

Email: [questions.dor@state.or.us](mailto:questions.dor@state.or.us)

Website: [www.oregon.gov/DOR](http://www.oregon.gov/DOR)

## 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 federal 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. However, Pennsylvania does not consider government quarters overseas to be a "permanent residence elsewhere." Filing a return is not required, but it is recommended to preserve domicile status. File Form PA-40 for all income derived from Pennsylvania sources.

Write: Commonwealth of Pennsylvania, Department of Revenue, Taxpayer Services Department, Harrisburg PA 17128-1061.

Phone: (717) 787-8201.

Email: Link through the website's "Contact Us" tab.

Website: [www.revenue.pa.gov](http://www.revenue.pa.gov)

## PUERTO RICO

Individuals who are domiciled in Puerto Rico are considered residents and are subject to tax on their entire income regardless of their physical presence in the commonwealth. Normally, they may claim a credit with certain limitations for income taxes paid to the United States on income from sources outside Puerto Rico. 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) 727-2020.

Email: [infoserv@hacienda.gobierno.pr](mailto:infoserv@hacienda.gobierno.pr)

Website: [www.hacienda.gobierno.pr](http://www.hacienda.gobierno.pr)

## RHODE ISLAND

Individuals domiciled in Rhode Island are considered residents and are subject to tax on their entire income

regardless of their physical presence in the state. The 2014 Rhode Island tax rate is 3.75 percent of taxable income up to \$59,600 for all filers, 4.75 percent for income over \$59,600 and 5.99 percent of taxable income over \$135,500 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.

Email: [txassist@tax.state.ri.us](mailto:txassist@tax.state.ri.us)

Website: [www.tax.state.ri.us](http://www.tax.state.ri.us)

## SOUTH CAROLINA

Individuals domiciled in South Carolina are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. South Carolina's 2014 tax rates rise in six steps from 3 percent on the first \$5,760 of South Carolina taxable income to a maximum of 7 percent of taxable income over \$14,400.

Write: South Carolina Tax Commission, P.O. Box 125, Columbia SC 29214.

Phone: (803) 898-5000.

Email: [iitax@sctax.org](mailto:iitax@sctax.org), or through the "Contact Us" tab.

Website: [www.sctax.org](http://www.sctax.org)

## SOUTH DAKOTA

There is no state income tax and no state inheritance tax. State sales and use tax is 4 percent; municipalities may add up to an additional 2.75 percent.

Write: South Dakota Department of Revenue, 445 E. Capitol Ave., Pierre SD 57501-3185.

Phone: (605) 773-3311.

Email: Link through the website's "Contact Us" tab.

Website: [www.dor.sd.gov](http://www.dor.sd.gov)

## TENNESSEE

Salaries and wages are not subject to state income tax, but Tennessee imposes a 6-percent tax on most dividends and interest income of more than \$1,250 (single filers) or \$2,500 (joint filers) in the tax year.

Write: Tennessee Department of Revenue (Attention: Taxpayer Services), 500 Deaderick St., Nashville TN 37242.

Phone: (615) 532-6439.

Email: [TN.Revenue@tn.gov](mailto:TN.Revenue@tn.gov)

Website: [www.state.tn.us/revenue](http://www.state.tn.us/revenue)



## 2014 AFSA TAX GUIDE

### TEXAS

There is no state personal income tax.

Write: Texas Comptroller, P.O. Box 13528, Capitol Station, Austin TX 78711-3528.

Phone: (800) 252-5555.

Email: [comptroller.help@cpa.state.tx.us](mailto:comptroller.help@cpa.state.tx.us)

Website: [www.window.state.tx.us](http://www.window.state.tx.us)

### UTAH

Utah has a flat tax of 5 percent on all income. 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: toll-free (800) 662-4335, or (801) 297-2200.

Email: Link through the website's "Contact Us" tab.

Website: [www.tax.utah.gov](http://www.tax.utah.gov)

### VERMONT

Individuals domiciled in Vermont are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. The 2014 tax rate ranges from 3.55 percent on taxable income under \$36,900 for singles and \$61,600 for joint filers to a maximum of 8.95 percent on taxable income over \$405,100 for singles and joint filers.

Write: Vermont Department of Taxes, Taxpayer Services Division, 133 State St., Montpelier VT 05633-1401.

Phone: (802) 828-2865.

Email: Link through the website's "Contact Us" tab.

Website: [www.state.vt.us/tax](http://www.state.vt.us/tax)

### VIRGINIA

Individuals domiciled in Virginia are considered residents and are subject to tax on their entire income regardless of their physical presence in the state. Individuals domiciled elsewhere are also considered residents for tax purposes for the portion of any calendar year in which they are physically present in the state for 183 days or more. These individuals should file using Form 760. In addition, Virginia requires non-residents to file Form 763 if their Virginia Adjusted Gross Income (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.

Email: Link through the website's "Contact Us" tab.

Website: [www.tax.virginia.gov](http://www.tax.virginia.gov)

### WASHINGTON

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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 and local additions can increase that to 9.5 percent in some areas.

Write: Washington State Department of Revenue, Taxpayer Services, P.O. Box 47478, Olympia WA 98504-7478.

Phone: toll-free (800) 647-7706.

Email: Link through the website's "Contact Us" tab.

Website: [www.dor.wa.gov](http://www.dor.wa.gov)

## WEST VIRGINIA

There is no tax liability for out-of-state income if the individual has no permanent residence in West Virginia, has a permanent residence elsewhere and spends no more than 30 days of the tax year in West Virginia. However, non-resident domiciliaries are required to file a return on Form IT-140 for all income derived from West Virginia sources. Tax rates rise in four steps from 4 percent of taxable income over \$10,000 for all filers, to 6.5 percent of taxable income for all filers over \$60,000.

Write: Department of Tax and Revenue, Taxpayer Services Division, P.O. Box 3784, Charleston WV 25337-3784.

Phone: toll-free (800) 982-8297, or (304) 558-3333.

Email: [TaxWVTaxAid@wv.gov](mailto:TaxWVTaxAid@wv.gov)

Website: [www.wvtax.gov](http://www.wvtax.gov)

## WISCONSIN

Individuals domiciled in Wisconsin are considered residents and are subject to tax on their entire income regardless of where the income is earned. Wisconsin's current tax rate ranges from 4 percent on income up to \$10,910 for single filers or \$14,540 for joint filers, rising in four steps to a maximum of 7.65 percent on income over \$240,190 for single filers or \$329,250 for joint filers.

Write: Wisconsin Department of Revenue, Individual Income Tax Assistance, P.O. Box 8906, Madison WI 53708-8906.

Phone: (608) 266-2772.

Email: [DORIncome@revenue.wi.gov](mailto:DORIncome@revenue.wi.gov)

Website: [www.dor.state.wi.us](http://www.dor.state.wi.us)

## 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 4 percent.

Write: Wyoming Department of Revenue, Herschler Building, 122 West 25th St., Cheyenne WY 82002-0110.

Phone: (307) 777-5200.

Email: [dor@wyo.gov](mailto:dor@wyo.gov)

Website: <http://revenue.wyo.gov>

## 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. 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](http://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 10 percent. See also [www.revenue.alabama.gov/taxpayerassist/retire.pdf](http://www.revenue.alabama.gov/taxpayerassist/retire.pdf).

## ALASKA

No personal income tax. Most municipalities levy sales or use taxes of between 2 and 7 percent and/or a property tax.

## ARIZONA

Up to \$2,500 of U.S. government pension income may be excluded for each taxpayer. There is also a \$2,100 exemption for each taxpayer age 65 or over. Arizona does not tax Social Security. Arizona state sales and use tax is 5.6 percent, with additions depending on the county and 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 not taxed. There is no estate or inheritance tax. State sales and use tax is 6 percent; city and county taxes may add another 3 percent.

## CALIFORNIA

Pensions and annuities are fully taxable. Social Security is not taxed. The sales and use tax rate varies from 7.25 percent (the statewide rate) to 10.5 percent in some areas.

## COLORADO

Up to \$24,000 of pension income is exempt if an individual





## 2014 AFSA TAX GUIDE

is age 65 or over. Up to \$20,000 is exempt if the individual is age 55 to 64. State sales tax is 2.9 percent; local additions can increase the total to as much as 9.9 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

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 income is excluded from taxable income. Delaware does not impose a sales tax.

### DISTRICT OF COLUMBIA

Pension or annuity exclusion of \$3,000 is applicable if 62 years or older. Social Security is excluded from taxable income. Sales and use tax is 5.75 percent, with higher rates for some commodities (liquor, meals, etc.).

### FLORIDA

There is no personal income, inheritance, gift tax or tax on intangible property. 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

\$35,000 of retirement income is excluded for those who are 62 years or older or totally disabled. Up to \$65,000 of retirement income is 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 in Hawaii. Social Security is not taxed. 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 only qualify for a deduction in 2014 of up to \$31,704 for a single return and up to \$47,556 for a joint return. 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 or Social Security. State sales tax is 6.25 percent. Local additions can raise sales tax to as much as 10.5 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



David L. Mortimer, CPA, has over twenty years of experience in tax planning, research and compliance. This experience includes developing tax minimization strategies, planning business transactions, and tax audit representation.

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Web site: [www.mytaxcpa.net](http://www.mytaxcpa.net)

\$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 not taxed in Indiana. Sales tax and use tax in Indiana is 7 percent.

## IOWA

Generally taxable. A married couple with an income for the year of less than \$32,000 may file for 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 \$24,000 or less. The same income tax rates apply to annuities as to other incomes. Iowa has phased out taxation of Social Security benefits and these will not be taxed in tax years 2014 and subsequently. Statewide sales tax is 6 percent, with no more than 1 percent added in local jurisdictions.

## KANSAS

U.S. government pensions are not taxed. Extra deduction of \$850 if over 65. Social Security is exempt if Federal Adjusted Gross Income is under \$75,000. State sales tax is 6.3 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 fully excludable for 2014. Social Security is exempt. Sales and use tax is 6 percent statewide, with no local sales or use taxes.

## LOUISIANA

Federal retirement benefits are exempt from Louisiana state income tax. There is an exemption of \$6,000 of other annual retirement income received by any person age 65 or over. Married filing jointly may exclude \$12,000. State sales tax is 4 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 \$1,450 (single), \$1,150 (married filing singly) or \$2,200 (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 \$27,100. 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 exempt. 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

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Massachusetts gross income. Each taxpayer over age 65 is allowed an additional \$700 exemption on other income. Sales tax is 6.25 percent.

### MICHIGAN

Pension benefits included in Adjusted Gross Income from a private pension system or an IRA are deductible, for those born before 1946, to a maximum of \$47,309 for a single filer, or \$94,618 for joint filers; public pensions are exempt. 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. If born after 1952, not eligible for any exemption until reaching age 67. Social Security is exempt. Full details at: [www.michigan.gov/documents/taxes/PensionBenefitsChart\\_444931\\_7.pdf](http://www.michigan.gov/documents/taxes/PensionBenefitsChart_444931_7.pdf).

Michigan's state sales tax rate is 6 percent. There are no city, local or county sales taxes.



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### 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, 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; some local additions may increase the total to as much as 9.53 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

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 \$35,939 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 additions may add another 2 percent.

### MONTANA

There is a \$3,980 pension income exclusion if Federal Adjusted Gross Income is less than \$33,200. Those over 65 can exempt an additional \$800 of interest income for single taxpayers and \$1,600 for married joint filers. Social Security is subject to tax. 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 who are age 62 or older or totally and permanently disabled. Singles and heads of households can exclude up to \$15,000 of retirement income; those married filing jointly up to \$20,000; those married filing separately up to \$10,000 each. These exclusions are eliminated for New Jersey gross incomes over \$100,000. Residents over 65 may be eligible for an additional \$1,000 personal exemption. Social Security is not taxed. State sales tax is 7 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 6.625 percent in some jurisdictions.

## 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 [www.tax.ny.gov/pdf/publications/income/pub36.pdf](http://www.tax.ny.gov/pdf/publications/income/pub36.pdf) for details. Sales tax is 4 percent state-wide. Other local taxes may add up to an additional 5 percent.

## NORTH CAROLINA

Pursuant to the "Bailey" decision, (see [www.dorn.com/taxes/individual/benefits.html](http://www.dorn.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. Beginning in tax year 2014 and later, the first \$4,000 is no longer exempt. For those over 65, an extra \$750 (single) or \$1,200 (couple)

may be deducted. Social Security is exempt. 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 exempt. General sales tax is 5 percent, 7 percent on liquor. Local jurisdictions impose up to 3 percent more.

## OHIO

Taxpayers 65 and over may take a \$50 credit per return. In addition, Ohio gives a tax credit based on the amount of the retirement income included in Ohio Adjusted Gross Income, reaching a maximum of \$200 for any retirement income over \$8,000. Social Security is exempt. State sales tax is 5.5 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. A tax credit of up to 9 percent of taxable pension income is available to recipients of pension income, including most private pension income, whose 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. Oregon does not tax Social Security benefits. 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.



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### 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 not taxed.

### RHODE ISLAND

U.S. government pensions and annuities are fully taxable. 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 65 years of age or over can claim a \$10,000 deduction on qualified retirement income. A resident of South Carolina who is 65 years or older may claim a \$15,000 deduction against any type of income (\$30,000 if

both spouses are over 65), but must reduce this figure by any other retirement deduction claimed. Social Security is not taxed. Sales tax is 6 percent plus 1 percent in some counties. Residents aged 85 and over pay 5 percent.

### SOUTH DAKOTA

No personal income tax or inheritance tax. State sales-and-use tax is 4 percent; municipalities may add up to an additional 2 percent. Residents who are age 65 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 refund.

### TENNESSEE

Social Security, pension income and income from IRAs and TSP are not subject to personal income tax. Most interest and dividend income is taxed at 6 percent if over \$1,250 (single filers) or \$2,500 (married filing jointly). However, for tax year 2013 and subsequently, those over 65 with total income from all sources of less than \$33,000 for a single filer and \$59,000 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 5 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 is 4.7 percent; local option taxes may raise the total to as much as 9.95 percent.

### VERMONT

U.S. government pensions and annuities are fully taxable. State general sales tax is 6 percent; local option taxes may raise the total to 7 percent (higher on some commodities).

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## VIRGINIA

Individuals over age 65 can take a \$12,000 deduction. However, this 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 income is exempt. 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 9.5 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. 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. Wisconsin does not tax Social Security benefits included in Federal Adjusted Gross Income. For tax years after 2009, those over 65 and with an AGI of less than \$15,000 (single filers) or \$30,000 (joint filers) may take a \$5,000 deduction on income from federal retirement systems or IRAs. 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 to another 4 percent. ■

—James Yorke, Senior Labor Management Adviser



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■ **Harold J. Ashby Jr.**, 66, husband of retired FSO Edward McKeon, died peacefully on July 29, at his family home in Chevy Chase, Md.

A native of Newark, N.J., Mr. Ashby graduated from Harvard University with an undergraduate degree in international affairs. He later received his MBA from the Wharton School of the University of Pennsylvania and an M.Ed. from the University of Hawaii. From the late 1970s until 1982, Mr. Ashby worked as the administrative director of Howard University's Sickle Cell Center.

With his partner, Edward, Mr. Ashby travelled the world, setting up his family's overseas homes in Tokyo, Osaka, Guangzhou, Tel Aviv and Mexico, as well as Honolulu and Washington, D.C.

Mr. Ashby was a brave pioneer in creating a stable and loving same-sex household in sometimes unwelcoming cultures. Indeed, he created the first such home that many foreigners had ever seen, thereby leaving a lasting and positive example. He became the second person to receive a U.S. diplomatic passport as a same-sex spouse.

Mr. Ashby managed to find jobs in each country, often as an English teacher or as an administrator, all the while planning the family's next move or adventure, not to mention innumerable diplomatic events. A lover of music, he was a disc jockey at a radio station in Tokyo, where he enjoyed some of the happiest times of his life. From 2007 to 2011, he worked in the administrative section of Embassy Mexico City.

While on assignment in Guangzhou, Mr. Ashby and Mr. McKeon adopted a child. Although China frowned on adoptions by same-sex couples, the adoption of Max Albert Ashby McKeon was approved. Later, despite Japan's reluctance to allow foreigners to adopt,

the adoption of Benjamin Makoto Ashby McKeon was also approved.

On July 21, 2008, Mr. Ashby and Mr. McKeon married in California, shortly after same-sex marriages became legal there, with their sons present. The union, which began in 1980, lasted for 34 years, cut short only by Mr. Ashby's passing.

Since retirement in 2011 to Chevy Chase, Md., Mr. Ashby spent even more time caring for his two boys, who remained the loves of his life. He was also able to indulge a passion for gardening that had been put on hold while overseas, except for an ill-fated attempt to coax a rose garden to life in Osaka.

Among the things that shaped him most was his lineage to Sergeant George Ashby, who fought in the Civil War and was with General Ulysses S. Grant when General Robert E. Lee surrendered at Appomattox Court House on April 9, 1865. His uncle, Albert Forsyth, was an African-American aviation pioneer and instructor to the Tuskegee Airmen.

Mr. Ashby was also shaped by his experience as a 16-year-old selected to represent New Jersey at a national meeting of high school student body presidents. He was one of only two African-American selectees out of the 50 states. On arrival in Nashville, 48 student body presidents were placed with local families who arranged social events for them. However, Mr. Ashby and his fellow African-American student body president were simply dropped off at a motel for "coloreds." Mr. Ashby's father wanted him to come home, but he decided to stay, vowing never to let discrimination or prejudice steer him from his path.

Mr. Ashby's smile and warm personality quickly helped him win lasting friendships around the world. He will long be remembered as a loving husband, father, role model and friend.

Mr. Ashby is survived by his husband, Edward, and sons, Max and Benjamin.

■ **Stephanie Mathews Bell**, 90, wife of the late Ambassador James Dunbar Bell, died on Aug. 8, 2014, in Davis, Calif.

Prior to marriage, Mrs. Bell worked for the Department of State. From 1950 to 1952, she served in Munich with the High Commission for Occupied Germany in the Office of the Land Commissioner for Bavaria. From 1952 to 1955, after postwar diplomatic relations were established between the United States and Germany, she worked in American Consulate General Munich.

On her return to Washington, D.C., she worked in the Bureau of Near Eastern, South Asian and African Affairs. When the Bureau of African Affairs was established as a separate entity, she transferred to it as an administrative officer.

Mrs. Bell received an Outstanding Performance Rating and a congratulatory letter from Secretary of State John Foster Dulles for her work in establishing the new bureau.

In 1960, she became an administrative officer in the Bureau of Far Eastern Affairs, where she met and married Mr. Bell. She accompanied him to the United Nations in 1961, and to Embassy Kuala Lumpur, where he served as ambassador from 1964 to 1969.

In 1970, the couple relocated to California, where Amb. Bell served as diplomat in residence at the University of California at Santa Cruz.

Mrs. Bell is predeceased by her son, Jefferson M. Bell. Survivors include her daughter, Stephanie Susan Bell; son-in-law, Jeffery Seiler; two grandsons: Samuel and John Bell Seiler; several nieces, including Ambassador Marianne M. Myles, and nephews.

■ **Rosa Maria Cody**, 85, wife of the late USAID Director Peter M. Cody, died from colon cancer on Sept. 1 at her home in Washington, D.C.

Mrs. Cody was born to Francisca and Alfredo Alatorre on Aug. 30, 1929, in the neighborhood of Coyoacán in Mexico City. Mrs. and Mrs. Alatorre worked for Mexico's Foreign Service.

Mrs. Cody and her husband-to-be met while working at the U.S. Embassy in Mexico City. Longing for new horizons and breaking with tradition, in 1957 Mrs. Cody married FSO Peter Cody, a divorced man with three sons.

They went on to live in El Salvador, Cambodia, Laos, Vietnam, Paraguay, Ecuador, the Philippines, Lebanon, Sudan, Kenya and Guatemala, as well as in Washington, D.C., between overseas postings.

While overseas, Mrs. Cody learned to speak several languages, play the harp and became adept in various art forms and cuisine. In Lebanon, she studied interior design. In Sudan, she redesigned the guest quarters for visitors to the mission. She was also responsible for the mission's fleet of drivers.

Mrs. Cody joined her husband in his numerous adventures, which included exploring the countryside of every country they lived in, climbing mountains, kayaking down rivers and getting to know the countries and their inhabitants. She embraced life as wife of the USAID director, and was known for her hospitality and generosity to all.

Mrs. Cody is predeceased by her husband, Peter, who died in 2012 at the age of 86.

She is survived by two daughters, Cornelia Cody of McLean, Va., and Cecilia Cody of Silver Spring, Md.; two stepsons, Michael Cody of Madrid, Spain, and Ryan Cody of Kirkland, Wash.; two grandsons,

Gregory Hickox of San Diego, Calif., and Robert Cody-Meisner of Silver Spring, Md.

■ **James Herbert De Cou**, 85, a retired FSO with the U.S. Information Agency, died after a brief illness on July 31, 2014, in Le Vesinet, France.

Mr. De Cou, or "Jazz" as others later knew him, was born on Dec. 1, 1928, and raised in Atascadero, Calif. He attended Stanford University, graduating magna cum laude in 1950. He served in the Air Force from 1952 to 1956, before joining the Foreign Service in 1957.

During a 25-year career with USIA, Mr. De Cou served in Afghanistan, Rhodesia (now Zimbabwe), Honduras, Laos, Vietnam, Martinique, Canada, Upper Volta (now Burkina Faso) and Cameroon. He developed fluency in six languages and was conversant in numerous others, as well. With an inherent interest in peoples and their languages, he fully immersed himself in the local culture when overseas.

Mr. De Cou's first assignment was to Kabul in 1957, followed shortly by a transfer to Salisbury (now Harare) as an information officer in 1958. A year later he was posted to Tegucigalpa, returning briefly to USIA before being posted to Luang Prabang as branch public affairs officer in 1961. He served for two years in Laos before being transferred to Martinique as public affairs officer, which was followed by an assignment to Saigon in 1965.

From 1967 to 1970, he held various positions at USIA, including branch public affairs officer in Montreal, Africa programs officer and public affairs officer in Ouagadougou and Yaounde.

Following divorce from his first wife, Michelle, and retirement in 1979, he lived in Herndon, Va., until his marriage to Irene Epstein in 1987. He then moved to the suburbs of Paris, France, where he remained until death.

Mr. De Cou loved opera, jazz, plays, ethnic cuisine, learning new languages and deep philosophical discussion about politics and world affairs. He sponsored the immigration of many families from Laos, Vietnam, China and other countries to the United States.

In doing so, he was heavily engaged in helping all family members develop careers, educational pursuits and successful transitions into American society.

Friends and family will miss his wit, engaging personality, political acumen and the exceptional reasoning, intelligence and insight he brought to every conversation.

Mr. De Cou is survived by his beloved wife of 28 years, Irene; three children: Claire De Cou of Centreville, Va., Mike De Cou of Mesa, Ariz., and Jack De Cou of Alpine, Wyo.; a brother, Jerry of Atascadero, Calif.; a sister, Susan Bailey of Rino, Calif.; three grandchildren: Alex, Colette and Shea-Mikhail; and many nieces and nephews.

Mr. De Cou also leaves a legacy of deep friendships too numerous to mention, but he would want that to be acknowledged, as well—not as a testament to his character, but rather as validation of the importance he ascribed to such precious relationships.

■ **Mary Lee Deerfield**, 78, wife of retired FSO and U.S. Army Lieutenant Colonel Eddie Deerfield, died on Oct. 23 in Palm Harbor, Fla. She spent her final days accompanied by her husband; two stepsons, Jim and Rick Deerfield; and Cantor Deborah Jacobson of Temple Ahavat Shalom.

Mrs. Deerfield enjoyed a remarkable life. She accompanied her husband on overseas tours in India, Pakistan, Malawi, Canada, Uganda and Nigeria. She was active in social welfare in each country,

and was often invited as a guest speaker at fundraising and other events.

In Kolkata, she befriended Mother Teresa and assisted her Missionaries of Charity. In Kampala, she was awarded a Tribute of Appreciation by the Department of State in recognition of outstanding service as headmistress of the Lincoln International School.

Mrs. Deerfield continued to shine in private life after she and her husband retired to Florida in 1991. She was an avid gardener, a member of the East Lake Ladies Bridge Club and a president of the Palm Harbor Garden Club.

Her Crown of Thorns, a flowering plant native to Madagascar, earned the blue ribbon in the club's 1995 flower show. She planted bougainvillea in her garden as reminders of her years in South Asia and Africa.

She was also active in planning reunions for Mr. Deerfield's 303rd Bomb Group Association, a World War II veterans' organization, and was honored by the association with a plaque in recognition and appreciation for her many years of dedicated and outstanding service.

Mr. and Mrs. Deerfield celebrated their 51st wedding anniversary on Aug. 3. Friends remember her as one-of-a-kind—adventurous, courageous and warm-hearted.

Her stepsons recall that she was like a second mother and that she treated them as her own sons throughout her life.

Mrs. Deerfield is predeceased by two sons, Scott and Mark, and her parents, Leo and Thelma Decker. Survivors include her husband, brother, stepsons, four granddaughters and two great-grandchildren.

■ **Ruth Merrill "Jody" Foster**, 84, wife of the late U.S. Information Agency FSO John P. Foster, died peacefully on Sept. 26

in Seattle, Wash., surrounded by her three children and loving caregivers.

Born outside Boston on Nov. 9, 1929, Mrs. Foster spent her childhood in Wilkes-Barre, Pa., and Long Island, N.Y., following the untimely death of her father. She attended high school at Lawrence Woodmere Academy in Woodmere, N.Y., and went on to study at Trinity College in Washington, D.C., and The Julliard School in New York, N.Y.

Baptized into the Catholic Church as a young girl, along with her widowed mother, Ruth, and two sisters, Mary and Leslie, Mrs. Foster made deep faith the hallmark of her life.

She met the love of her life, John Foster, at CBS News in New York City in the early days of television. She worked in the film library and he in the mailroom.

During their 50-year marriage, the couple spent nearly 30 years in the Foreign Service with postings to Greece, Iran, Afghanistan, Ghana, India, Jordan, the Philippines and South Africa.

Mrs. Foster served as president of the American Women's Club in several countries. She was an active early supporter of Mother Teresa's Missionaries of Charity, assisting with their ministry to the poor in India, Jordan and the Philippines.

She was a member of the Daughters of the American Revolution (Susquehanna County Chapter) for 60 years, as well as The Mayflower Society.

A powerful writer, her 1988 *New York Times* opinion piece, "At 85, Frightened by a Loss of Power," chronicled her mother's descent into Alzheimer's and prompted a multitude of readers' response.

Several years before her husband's retirement in 1985, Mrs. Foster took the FS exam, passed and got an offer. The couple debated transitioning so that Mr. Foster would assume the role of trailing spouse; but, ultimately, she decided not to join.

In 1985, the Fosters settled in Stinson Lake, N.H., where Mrs. Foster served as Sunday lecturer in St. Matthew's Parish in Plymouth. She is remembered for her elegant elocution. She also wrote and recorded commentary for National Public Radio, with stories about country living.

In 2001, Mr. and Mrs. Foster moved into her parent's home in Haverhill, where she remained until 2011. After Mr. Foster's death, she was diagnosed with Alzheimer's and moved into assisted living, first in Aptos, Calif., and later in the Seattle area.

Friends and family remember Mrs. Foster for the parts she played, the places she occupied and the people she touched—and there were many. A wonderful wife and mother, social activist, current events aficionado and devoted listener, she was by avocation a conversationalist. As her children put it, she had the gift.

Mrs. Foster was predeceased by her husband, John; her parents, Ruth and Harry Fogarty; and her sisters, Mary Brintle and Leslie Nordin.

Survivors include three children: Kent (and his wife, Susanne), James (and his wife, Jayne) and Mary Claude (and her husband, Ahmad); nine nieces and nephews; seven grandchildren and two great-grandchildren.

Donations in her name may be made to Missionaries of Charity (ATTN: Sr. Maria Auxilia, MC) at 207 Black Diamond Canyon Drive, Gallup NM 87301.

■ **George J. Krieger Jr.**, 82, a retired Foreign Service staff officer, died of lung cancer on Aug. 12, at his home in Potomac, Md.

A Philadelphia native, Mr. Krieger began his career as a sportswriter for the *Miami Daily News* from 1949 to 1953. He moved to the Washington, D.C., area and



joined the U.S. Marines in 1953, serving until 1955.

Mr. Krieger worked at the State Department for 37 years, from 1955 until his retirement in 1992. He began as a clerk-typist and went on to hold increasingly responsible positions, the last as budget and finance chief in the Bureau of African Affairs.

During his time as an FSO, he served two tours in Nairobi and two tours in Ottawa.

Mr. Krieger enjoyed movies, the study of history and the Redskins football team. He was a member of Our Lady of Mercy Catholic Church in Potomac, Md.

He is survived by his wife, the former Mary Kirkpatrick.

■ **Douglas L. Langan**, 70, a retired FSO and former deputy director of the Foreign Service Institute, died of lung cancer on Aug. 25, at his home in Wilmington, N.C.

Mr. Langan was born on Oct. 9, 1943, in Phoenix, Ariz., to Dolores and Leroy F. Langan. An army brat, Mr. Langan grew up all over the United States and abroad in Korea. Baseball was a lifetime love, and he played from childhood through college. A gifted pitcher, he earned both the nickname "Lefty" and a tryout with the major leagues.

He graduated from the University of Pittsburgh and enrolled at Georgetown University Law School, but left to join the Peace Corps where he served from 1967 to 1969 in a tin mining town at an elevation of 14,000 feet in the Bolivian Andes.

He went on to complete his law degree at Rutgers Law School in 1971, and joined the Foreign Service later that year.

Mr. Langan's career included posts overseas in Istanbul, Havana, La Paz and Lima, where he served as deputy chief of mission. In Washington, D.C., he served as

deputy assistant secretary of State in four different bureaus, one of very few people to hold so many senior posts.

He led the advance team that reestablished a Foreign Service presence in Cuba in 1977, and later was responsible for opening U.S. embassies in the newly independent republics of the former Soviet Union, the former Czechoslovakia and former Yugoslavia.

His final assignment was as deputy director of the Foreign Service Institute.

After his retirement in 1997, Mr. Langan served as a consultant to the State Department. Most notably, he organized the new Office of the Global AIDS Coordinator after the creation of the President's Emergency Program for AIDS Relief.

In 2005, he chaired a task force that reviewed the U.S. diplomatic presence in Iraq and made widely praised recommendations regarding the staffing and organization of the new embassy in Baghdad. He received a number of significant awards for his work.

Mr. Langan was most proud, however, of raising three boys as a single parent. He retired to Wilmington, N.C., in 1998.

Mr. Langan reveled in his retirement years, living near a beautiful beach and indulging his passions for fishing, running, reading and watching sports on TV. He valued his family above everything and loved spending time with them.

Friends and family members recall him as a very special person, with a gift for listening attentively to every person he encountered. He was knowledgeable and accomplished, yet unassuming and modest. His sense of humor, quick wit and ready laugh made him a joy to spend time with.

Mr. Langan's family is deeply grateful for the care provided by his doctors, who worked so valiantly to extend his life, as well as the outstanding care provided

in the last weeks of his life by hospice attendants.

Memorial donations may be made to the Lower Cape Fear Hospice Foundation (1414 Physicians Dr., Wilmington NC 28401); or CancerGrace (GRACE, 4616 25th Ave. NE, #300, Seattle WA 98105).

Mr. Langan is survived by his wife, Anne; three sons and their wives: Matthew (Michele), David (Jessica) and John (Misha); six beloved grandchildren: Jacob, Luke, Blake, Avery, Brayden and Evan; a sister and her husband, Debby (Dick) Heller; a brother and his wife, Richard (Mary); and four nephews: Adam, Christopher, Andrew and Gregory.

He also leaves three stepchildren: Tad Ryals, Tucker Ryals (Ericka) and Elizabeth Bourgeois (Brennan); and was a loving grandfather to their children: Taylor, Emma, Maggie, Sam and Hudson.

■ **Joseph H. Melrose, Jr.**, 69, retired FSO and former ambassador to Sierra Leone, died on Nov. 8 at Lehigh Valley Hospital in Allentown, Pa., from injuries suffered in a fall.

A Pennsylvania native, Mr. Melrose graduated from Ursinus College in Collegeville, Pa., in 1966. He taught in Philadelphia and Cheltenham while studying for a master's degree at Temple University, and joined the Foreign Service in 1969.

His began his career with overseas assignments to Vietnam and Syria. He was consul general in Karachi when Pakistan President Muhammad Zia-ul-Haq and U.S. Ambassador Arnold Raphel died in a plane crash during the start of Pakistan's third democratic era.

From 1995 to 1998, he was deputy chief of mission in Lagos, during a time of great change and the start of Nigeria's democratic transition.

Mr. Melrose served as ambassador to Sierra Leone from 1998 to 2001, brokering

the Lomé Agreement. During this time the American embassy was severely damaged in the conflict and was evacuated. To maintain U.S. operations in Sierra Leone, Ambassador Melrose and his staff flew to the embassy every day by helicopter from Guinea.

During a second evacuation, he remained in Sierra Leone with a lone staffer. Through it all, he was able to secure humanitarian aid for the country and negotiate peace. He also helped establish the Special Court for Sierra Leone to try those most responsible for the devastating human rights violations that occurred.

Amb. Melrose also held a wide range of domestic positions, including vice

president of AFSA and executive director of the Bureaus of Political-Military, Near East and South Asian Affairs.

He was instrumental in uncovering the connection between the illicit trade in diamonds and conflict, and helped establish the certification program that evolved into the Kimberley Process.

Testifying before Congress on conflict diamonds, he stated: "The customer should be able to know that the diamond he or she purchased did not get to the retail counter by increasing the suffering of fellow human beings."

Renowned for his ability to solve problems, Amb. Melrose was sometimes referred to as "Mr. Fixit." He led the Foreign Emergency Support Team that deployed to Nairobi following the August 1998 U.S. embassy bombings, where he helped oversee the reestablishment of embassy operations and the recovery effort.

He also played a role in reopening Embassy Beirut in 1983 and the evacuation of Karachi during the Persian Gulf War.

In September 2001, he served as coordinator for the post-9/11 Task Force. When asked why he had so often been selected to function as a diplomatic repairman, he said he merely had the experience of "being in the wrong places at the wrong time."

Amb. Melrose retired in 2002 and fulfilled a dream of returning to Ursinus to give back that spirit of service which inspired him, most recently serving as ambassador-in-residence and professor of international relations at the college. His mentorship was legendary, and he made time for every student, staff member or four-legged friend that passed him by.

He was called again to serve on a range of projects, including as senior consultant to the coordinator for coun-

terterrorism and as acting representative for management/reform to the United Nations, a position he was preparing to take up once more at the time of his untimely death.

From 2006 to 2008, he served as a senior adviser to the U.S. delegation to the United Nations General Assembly. Most recently he served as vice chair of the Benghazi Accountability Review Board in 2012.

Amb. Melrose utilized his skills and abilities in a variety of endeavors, helping found the Special Olympics, Donkey Cart Races and a Boy Scout troop in Karachi. He volunteered for International Medical Corp and was a board member of Restless Development.

He served from 2005 to 2008 as president of the National Collegiate Conference Association and sponsor of the National Model U.N., doubling its size during his tenure and bringing his uniquely pragmatic viewpoint to a broader audience.

Among the many awards he received were the Foreign Service Cup; honorary degrees from Hilla University (Iraq), Ursinus College and Francis Marion University; the Department of State's Distinguished Honor Award; the Secretary of State's Career Achievement Award; the Presidential Distinguished Service Award; and the Award of Merit from the World Islamic Federation.

Through it all, Amb. Melrose lived his life with a sense of humor and unassuming humility that will be missed by those who knew him.

Mr. Melrose is survived by his son, Joseph Andrew; daughter-in-law, Binali; and granddaughter, Nina Melrose of Washington, D.C., along with countless former students, colleagues, friends and one WWII jeep.

Memorial contributions may be made to the Joseph H. Melrose Fund



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(c/o Ursinus College) or the Amb. Joseph H. Melrose Jr. International Scholarship (c/o NCCA).

Mr. Melrose's family respectfully requests that stories of his adventures be shared with [jhmelrose@gmail.com](mailto:jhmelrose@gmail.com) to pass on to Nina.

■ **A. David Miller**, 60, a retired FSO with the State Department, died on Nov. 21 in Gaithersburg, Md., following a battle with cancer.

Mr. Miller was born in Crystal Falls, Mich., on Aug. 4, 1954, to Roy E. Miller Jr. and Jane (Fay) Miller. When he was 4 years old, his family moved to Iron Mountain, Mich.

He graduated from the University of Iowa in 1976 and earned an MBA degree from the University of Minnesota in 1980.

Mr. Miller joined the Foreign Service in 1983 and served in the economic cone, retiring in 2012. During his career, he was posted to the U.S. Consulate in Calgary and to embassies in Kuala Lumpur, Moscow, Stockholm and Port of Spain.

He loved music, was a natural musician and an accomplished pianist. Wherever he was posted, Mr. Miller sought out and joined a fine choir, including the World Bank Choir in Washington, D.C., performing many hours of choral music and solo work as a baritone.

Friends and family remember Mr. Miller as a warm, gregarious man who has left many friends scattered across the world.

He is survived by his wife, Maya; her daughter, Ekaterina Miller (and her husband, Julio Noguez) of Ann Arbor, Mich.; his two children, Andrew Roy Miller and Kristjana Laura Miller of Calgary; his mother, Jane F. Miller of Kingsford, Mich.; his sister, Marguerite J. Miller (and her husband, Robert Lees) of Washington, D.C.; and several cousins.

■ **Harry I. Odell**, 93, a retired FSO, died of cardiopulmonary arrest on Sept. 28 in Margaretville, N.Y.

Mr. Odell was born in Cornwall-on-Hudson, N.Y. He graduated from Brown University and earned master's degrees from the Fletcher School of Law and Diplomacy and Harvard University.

During July 1943, while a member of the U.S. Army Air Corps, his B-17 bomber was shot down in a raid over Germany, and he was held as a prisoner of war for almost two years in Stalag Luft III and other camps until the end of World War II.


Mr. Odell joined the Foreign Service in 1949. In 1950, his 27-member entering class went as a group to Germany to serve as resident officers of the occupation. He began his diplomatic career managing an entire district of Bavaria. Other economic and consular postings included Germany, Israel, Ceylon (now Sri Lanka), Greece, Jordan and Washington, D.C.

Mr. Odell was chargé d'affaires in Jordan during the conflict between the Jordanian army and the Palestinian militants. He concluded his 28-year Foreign Service career as deputy chief of mission at Embassy Bern.


Following retirement in 1978, Mr. Odell became executive director at the American Swiss Association based in New York City. He also worked part time for the State Department declassifying documents under the Freedom of Information Act.

For many years he was a member of the Town Council of Glen Echo, Md., and a longstanding member of DACOR. He had split his time between homes in Washington, D.C., and Margaretville, N.Y., since the late 1990s.

Mr. Odell was predeceased by his wife of 51 years, Barbara Lohmann of Brooklyn, N.Y. He is survived by his daughter, Deborah Odell of Alexandria, Va., and Margaretville, N.Y.; his son, David Odell (and his

United States Department of State


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wife, Debra) of Altoona, Pa.; and nephews, nieces and friends.

■ **Alfred Reifman**, 95, a retired FSO and senior specialist in international economics, died of pneumonia on Oct. 15 at an assisted living facility in Chevy Chase, Md.

Mr. Reifman was born and raised in Elizabethtown, N.J. His father delivered milk from a horse-drawn cart and was an avid reader, encouraging Mr. Reifman to read and learn. Every Saturday he walked several miles to the library, returning with an armful of books. He graduated from the University of Michigan with an undergraduate and a master's degree with honors and distinction in mathematics and economics.

Mr. Reifman served in World War II in England and with the OSS in France. He moved to Washington, D.C., in the early 1940s and joined the State Department in 1946.

He was intimately involved in major U.S. international economic initiatives including development of the Marshall Plan, establishment of the Organization of Economic Cooperation and Development, the evolution of U.S. trade policy through the General Agreement on Tariffs and Trade and, more generally, reform of the international monetary system.

During a 26-year Foreign Service career, Mr. Reifman served in Paris, where he helped implement the Marshall Plan, and, during the 1960s, was chief economist for the U.S. Mission to OECD.

He served on the Council of Economic Advisers from 1952 to 1953 and from 1965 to 1967, where he wrote the international chapters of the President's Economic Report.

In 1972, Mr. Reifman graciously changed jobs to support his wife, Lucille, in her own distinguished federal govern-

ment career, joining the Congressional Research Service as a senior specialist in international economics.

For 24 years, he continued his passion for international economic policy and his love of government service, writing for Congress on legislative issues in international economic policy. He also taught seminars on foreign economic policy at Yale, Duke and American universities.

In addition to a rich and fulfilling career, Mr. Reifman was a founding member of the Bannockburn Community in Bethesda, Md. In 1957, he was an originator of the Bannockburn Spring Show, a community theater that pokes fun at social and political issues through song and skit.

With Mr. Reifman's perseverance, hard work, warmth, open spirit and a bit of friendly arm-twisting, the show never missed a year and is now one of the longest-running community theater performances in the country.

"Mr. Bannockburn Show," as he was sometimes called, loved the show and understood its value as an expression of community spirit.

Mr. Reifman played tennis three times a week until he was 90 and won many tournaments in his advanced years at his summer home in Eastham, Mass.

A vital and generous man who loved life, he was passionate about learning, service to others, his family and his community of Bannockburn. As one person described, "Al Reifman never got off an elevator without making a friend."

Mr. Reifman was predeceased by his wife of 72 years, Dr. Lucille Reifman, and his daughter, Elizabeth. Survivors include two daughters, Dr. Ann Reifman and Katherine Reifman, and three grandsons.

■ **David T. Schneider**, 91, a retired FSO and former ambassador to Bangladesh, died on Sept. 24 in Charles Town, W. Va.

Mr. Schneider was born on Nov. 20, 1922, in Glendale, Ohio, and spent most of his early years in Winchester, Mass. He interrupted pursuit of a degree in political science from Yale University to join the United States Army Air Force, serving as a pilot during World War II, flying B-24 and B-29 bombers and training flights for B-29 gunners. After the war, he graduated with honors from Yale.

Mr. Schneider joined the Foreign Service in 1950, specializing in South Asian affairs. He served twice in both India (Mumbai and New Delhi) and Pakistan (Karachi and Islamabad). While chargé d'affaires in New Delhi, he was the first foreigner to be informed by the Indians that they had detonated a nuclear device, which heralded the India-Pakistan nuclear arms race. In 1966 and 1967 he attended the National War College.

Subsequently he served as deputy assistant secretary of State for South Asia, with particular expertise in Indian and Pakistani affairs, and was senior deputy in the Bureau of Near Eastern and South Asian Affairs at the time of the 1983 bombing of the Marine Corps barracks and the U.S. embassy in Beirut.

In 1978, President Jimmy Carter appointed Mr. Schneider ambassador to Bangladesh, where he served for three years.

After a 33-year diplomatic career, Mr. Schneider retired from the Foreign Service in 1983 with the rank of Career Minister. He served as chairman of the Foreign Service Journal Editorial Board, and was a retiree representative on the American Foreign Service Association Governing Board.

An avid sailor, Mr. Schneider often raced sailboats where he was posted. He also skied with friends in Colorado yearly until well into his 80s. Mr. Schneider and his wife, the former Ann Scannell, whom he married in 1950, retired to Washing-

ton, D.C., and Hampstead, N.H., in 1994.

Mr. Schneider was predeceased by his wife, Ann, in 2003.

Survivors include children and grandchildren residing in New York, West Virginia, Maryland, Virginia and California.

■ **Daniel Johnson Siglin**, 97, a retired FSO who resided in Sarasota, Fla., and White Haven, Pa., died on Oct. 21.

Mr. Siglin was born on May 16, 1917, in East Side Borough, White Haven, Pa., to Elmer E. and Nettie Hayes Siglin. He graduated from White Haven High School in 1936 and went on to attend American Technical School and Penn State University.

During World War II, he served with the 29th Division, 121st Combat Engineers, and then undertook a 40-year career with the Department of Defense and Department of State.

As a Foreign Service officer, Mr. Siglin served mainly in the Middle and Far East, namely Turkey, Pakistan, Iran, Cyprus, Vietnam and the Philippines.

Following retirement from the Department of State in 1973, he served several more years as a consulting engineer for World Bank and USAID projects in Egypt, Somalia, Ghana, Kenya, Ivory Coast and Sierra Leone.

Mr. Siglin was a member of Masonic Lodge #442 in Wilkes-Barre, Pa.; the Ancient and Accepted Scottish Rite 32nd Degree in Manila; the Mystic Shrine, Zembo Temple in Harrisburg, Pa.; American Legion Post #400, Orlando, Fla.; and the American Foreign Service Reserve, Department of State, Washington, D.C.

Mr. Siglin is survived by his wife, My-Zung Ngac-Siglin of Sarasota, Fla.; his daughter, Janet A. Siglin of Onley, Va.; and his son, Daniel Shaw Siglin, daughter-in-law, Beth, and grandson, Reid, of Wellsboro, Pa. ■



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## A Walk in His Shoes: A Fictional British Diplomat Gets Real

### What Diplomats Do

*Sir Brian Barder, Rowman & Littlefield, 2014, \$44.00, hardcover, 226 pages.*

REVIEWED BY MARSHALL ADAIR

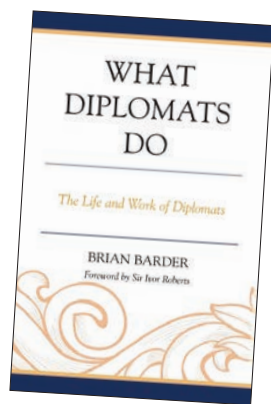
Many retired American diplomats wonder what can be done in our country to rectify the woeful lack of interest in and understanding of professional diplomatic service and its many contributions to the nation. We write books, lecture, lobby and generally proselytize, but we are still falling short.

*What Diplomats Do*, based on Sir Brian Barder's experience in the British Diplomatic Service, can make that effort more successful, and should be useful to universities and libraries, as well as interesting and enjoyable for the general public. It is a remarkably thorough account of the many dimensions of diplomatic work and life—not a turgid manual, but a simple story; not a novel, but almost a parable.

Sir Brian creates a fictional man, Adam, who applies to the UK Diplomatic Service just as he graduates from university. After going through a rigorous battery of tests and interviews, he is accepted and goes on to serve in a variety of assignments in Africa, North America and the Middle East. Along the way, he marries a woman, Eve, who is similarly new to international relations. Together, Adam and Eve work their way around the world and up Adam's career ladder, sharing their experiences and their “on-the-job” education with the reader.

We learn about the Diplomatic Service from Adam and Eve's experiences,

and from the education and advice that others (supervisors, friends, British colleagues and foreign counterparts) give them. This is very effective, because the author creates additional interest through the personality of the adviser. He



or she may be a clever character who is charming and compelling, or a boring and pedantic character who is ridiculous or shocking—but the reader remains engaged.

In addition, the author periodically takes the reader

aside and interjects his own actual experiences to expand the perspective of fictional narrative. Some of these asides are impressive, such as quietly talking the Ethiopian government out of bombing unauthorized relief convoys during the famine. Some of them are amusing, such as trying to explain to an Australian businessman in Sydney that as high commissioner in Canberra, Sir Brian is supervising the British consul general in Sydney, not working for him.

The book addresses most of the elements of diplomatic work and life: competing to get in and arriving at one's first overseas post; life and work in overseas posts; life and work at home; dealing with host country officials overseas; dealing with home country officials from overseas; consular and commercial work; entertaining; and the impact on spouses and children.

Though the author is talking about life and work in the British Diplomatic Service, the descriptions are remarkably similar to what one sees in the American

Foreign Service. The two major differences are size (the American presence is substantially larger) and the need to deal diplomatically with the Americans. Concerning the latter, Sir Brian is generally complimentary, though he has some critical—and sadly accurate—things to say about inexperienced and clumsy political appointee ambassadors.

Reading this, I sometimes wished that in my own career I could have crafted some of the clever and sophisticated word dances that he and his characters use to rebut accusations and still allow their counterparts “face” and the room to back off; or that I had his patience to achieve the mix of clarity and ambiguity necessary for multilateral consensus.

In *What Diplomats Do*, Sir Brian sticks to his subject. He describes the interaction of British diplomats with different parts of their own government, but does not digress into politics. He hints on several occasions that various reforms of the diplomatic service have not been improvements. And at the end of his career, Adam blasts private management consultants, perpetual reform, budget cuts, increased workload, responding to circulars and questionnaires, etc.

For prescriptive solutions—either bureaucratic or diplomatic—you need to go to Sir Brian's blog ([www.barder.com/ephems](http://www.barder.com/ephems)), which also offers a 30-percent discount on the book!

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*Marshall P. Adair retired from the Foreign Service as a minister counselor in 2007 after a distinguished 35-year diplomatic career. He is the author of Lessons from a Diplomatic Life: Watching Flowers from Horseback (Rowman & Littlefield, 2013). He is a former president of the American Foreign Service Association (1999-2001) and current retiree representative to the AFSA Governing Board.*



## Creating Space for the “Scholar-Practitioner”

### Scholars, Policymakers & International Affairs

*Edited by Abraham F. Lowenthal and Mariano E. Bertucci, Johns Hopkins University Press, 2014, \$29.95, 260 pages.*

REVIEWED BY JOSEPH BRISTOL

To paraphrase intellectual giant Hans Morgenthau: the search for truth leaves the scholar oblivious to power and the pursuit of power leads the politician to step on the truth.

The challenge of narrowing the gap between scholars and practitioners has long been noted, usually with the recognition that a greater flow of people and ideas between the firewalls of the ivory tower and the stovepipes of government could produce rewards for everyone. It could result in improved development, measurement and evaluation of policies, as well as more targeted and applicable research and analysis. But we’re not there yet.

Policymakers are still constrained by process, bureaucracy and politics. They can view academic data as esoteric and narrow, and shut the door to academic analysis. Academics, for their part, face challenging incentive structures. For example, selling their ideas to government officials does not result in tenure, whereas publishing in a prestigious academic journal might.

The authors attempt to explore that gap, share their experiences and offer lessons learned. Based on a symposium they organized in 2011 to increase the bonds between policymakers and academics, editors Abraham F. Lowenthal and Mariano E. Bertucci present a collection of readable, reflective essays written by scholars and practitioners.

Lowenthal is a distinguished professor emeritus at the University of Southern

California who has spent his career working on Latin America. Bertucci, a former student of Lowenthal’s, is a postdoctoral fellow at the Center for Inter-American Policy and Research at Tulane University.

The book covers a broad range of topics—from security to development—with most of the examples coming from Latin America. Contributors include scholars such as Mitchell Seligson, professor of political science at Vanderbilt University, and Peter Andreas, professor of political science at Brown University, as well as practitioners such as Rafael Fernández de Castro, former foreign policy adviser to the president of Mexico, and U.S. Career Ambassador and Counselor of the Department of State Tom Shannon. (Full disclosure: Ambassador Shannon also happens to be my boss.)

The essays present many excellent case studies based on the interaction or integration of scholars and practitioners. Examples include the design and evaluation of Mexico’s cash transfer programs that have incorporated economic theory and resulted in widespread poverty alleviation, the development and application of United Nations economic sanctions, and the politicization of debates about the U.S.-led international war on drugs.

In his thoughtful essay, University of British Columbia Professor Paul Evans describes how during the 1980s and 1990s an uptick in Canadian track-two diplomacy—the practice of involving everyday citizens in informal discussions on topics of policy import—led to many societal changes.

Canada became more involved in resolving South China Sea claims and expanded participation by academics



in other spheres, such as free trade agreement discussions. As a result, academics built networks with each other and became more connected to government officials. They engaged in new research and, in some cases, younger scholars altered the course of their careers.

Evans also notes how the scholar-practitioner concept differs in Asia. Because scholarly institutions in Asia are often sponsored, staffed and administered by the state, the concept of scholars as separate from the state does not necessarily hold true there. Moreover, Evans notes, measuring the impact of scholarship on various types of governments ranging from democratic to authoritarian is challenging. He contends that it is difficult to compare and draw conclusions about how receptive different governing structures are to academic inputs.

The Counselor’s Office, for one, has found the ideas in this book of great interest. Among other initiatives, we have attempted to link to outside institutions and bring in outside experts to interact with Department of State leaders. The broader foreign policy community and diplomats everywhere will no doubt also find the book useful.

The collaboration between scholar and practitioner is an untapped but potentially powerful resource. By exhibiting a degree of humility, and heeding some of the lessons in this book, we can break down the insularity of the two fields to very beneficial effect. ■

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*Joseph Bristol joined the Foreign Service in 2008 and has served in Beijing, Kabul and Washington, D.C., where he served in the Executive Secretariat. He is currently in the Office of the Counselor.*

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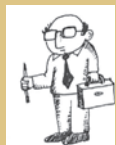
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# They Also Serve

BY STEVEN ALAN HONLEY

Fans of “Jeopardy” know that after the first commercial break, host Alex Trebek chats with each of the three contestants briefly, often about a hobby or a romantic or embarrassing moment (ideally one and the same) in the player’s life.

Those conversations are not improvised on the spot, of course. Rather, those who pass the annual online audition and go to a tryout—the equivalent of the oral portion of the Foreign Service entrance exam—are asked to list five “fun facts” about themselves that could be the topic of an exchange with Alex.

Coming up with those sounds like it should be a piece of cake for us Foreign Service folks, right? But when I worked on my own list after passing the online test last spring (and two years ago, when I also passed, but wasn’t selected for the show), I found it a real challenge.

My first two entries were easy enough to identify: I stood at the South Pole on New Year’s Eve 1988 and, as a result, have set foot on every continent. Much as it pains me to admit this, however, I can’t honestly claim either of those distinctions as an achievement.

I only got to Antarctica because I was the science officer (one of many hats I wore as a second-tour political/economic officer) at Embassy Wellington, and all my superiors had either already gone down to the ice or didn’t want to do so during the Christmas holidays. And while it was an unforgettable experience, I was still

essentially a glorified tourist who never even got cold.

In contrast, surviving the massive September 1985 earthquake in Mexico City, my first posting, certainly qualifies as a dramatic incident. And as if that weren’t traumatic enough, I happened to be the deaths and estates officer in the embassy’s citizen services section at the time.

Surviving the massive 1985 earthquake in Mexico City, my first posting, certainly qualifies as a dramatic incident.

But I got off lightly because, miraculously, just a handful of Americans died in the quake—and my intrepid Foreign Service National, Olga Meza, did just about all the work anyway. (That technicality didn’t stop me from dining out on earthquake stories throughout home leave, of course.)

As for the rest of my Foreign Service career, spent entirely in Washington, I am proud of the work I did as a desk officer in the Political-Military Affairs Bureau and the Bureau of African Affairs, as a watch officer in the Nuclear Risk Reduction Center, and as a bureau representative on countless task forces.

But again, it’s hard to come up with a snappy story from those years—though the night of Aug. 1, 1990, might qualify.

Moments after I arrived to represent PM on a task force monitoring the Marines’ evacuation of U.S. citizens from Liberia, Embassy Kuwait called to report

that Saddam Hussein’s tanks were moving into the country. I then spent my shift on a secure line comforting a terrified summer intern who passed on developments as heavy artillery boomed in the background.

Was that historic? Absolutely. But it’s not exactly fodder for a 30-second interview with Alex Trebek on national television.

Indeed, I think that is the biggest drawback to Foreign Service work: some of our most valuable contributions entail working behind the scenes, monitoring crises and keeping overseas situations

from making the news in the first place.

Yet, to quote the final lines of John Milton’s sonnet, “On His Blindness,” written when the poet lost his eyesight in his 40s: *Thousands at his bidding speed And post o’er land and ocean without rest: They also serve who only stand and wait.*

So to all the Foreign Service members who toil in anonymity—whether in the Operations Center, the bowels of a government annex or at a remote overseas post—I say this: Take heart! Your hard-won expertise may not lend itself to a sound bite, but it still matters.

Speaking of waiting, I’m still hoping for a summons to sunny Los Angeles to appear on “Jeopardy.” Even if I do get that call before my 18-month eligibility expires, Alex may be more interested in my having perfect pitch than diplomatic exploits.

But I still have those Foreign Service highlights on my “top five” list, just in case! ■

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*Steven Alan Honley, a Foreign Service officer from 1985 to 1997, is The Foreign Service Journal’s contributing editor.*



A female vendor, with her baby on her back and her older daughter trailing behind, walks along the beach in late afternoon. This was a familiar scene at the small, rocky beach used by locals in the Almadies section of Dakar, less than a mile from the new U.S. embassy. ■

*Regional Medical Officer Ed Miron joined the State Department Foreign Service in 2006 after 23 years of private practice as a family doctor in a small town. He spent two years in Riyadh, and was then posted to Dakar, where he took this photograph. In October, he completed an assignment as chief of foreign programs in the Office of Medical Services in Washington, D.C., and is now at FSI for the eight-week Portuguese FAST course in preparation for his next assignment, São Paulo, in January.*

*This photo was taken with a Canon EOS 5D Classic with a 70-200 mm zoom lens.*

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