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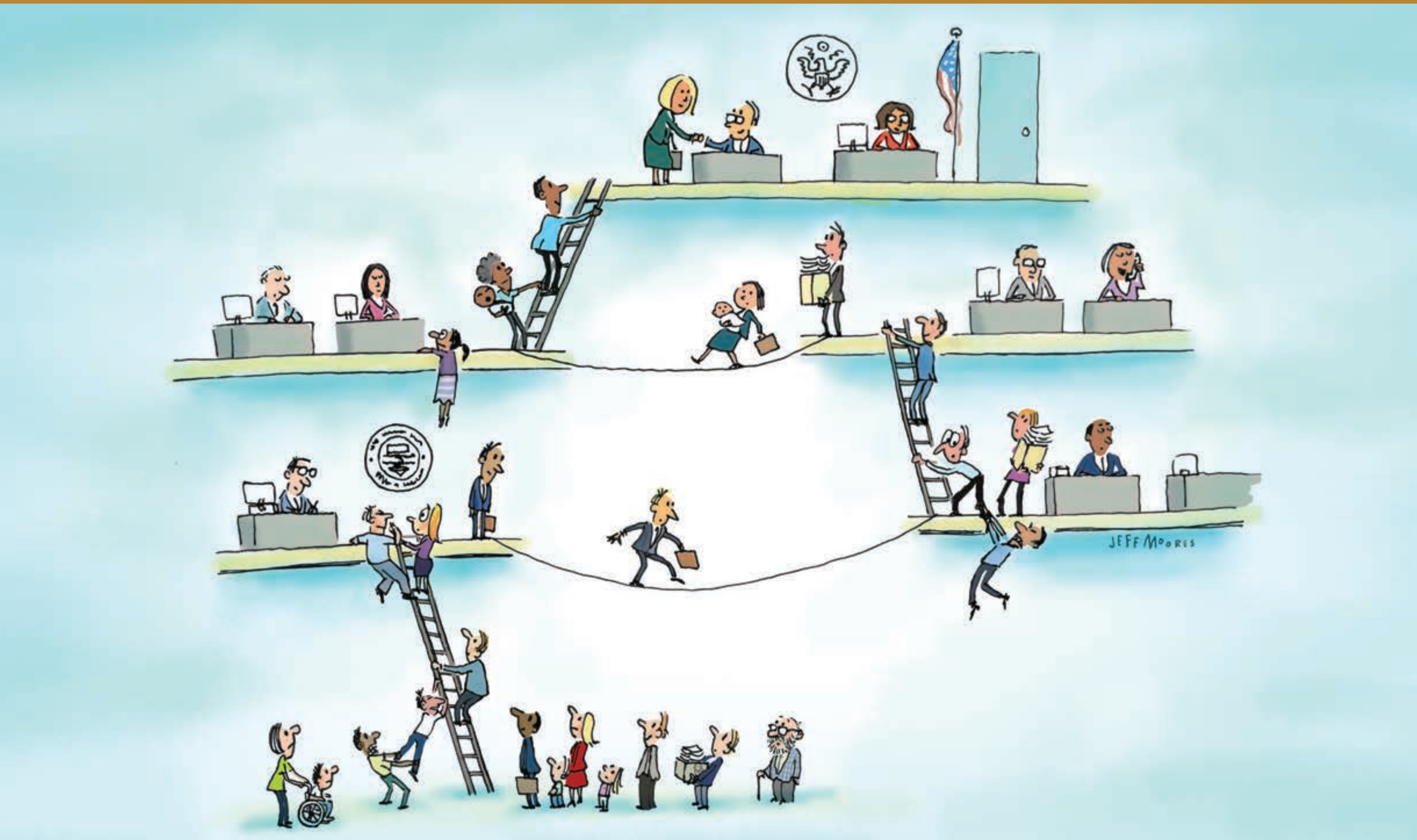

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April 2020 Volume 97, No. 3

Focus on Career and Performance Management

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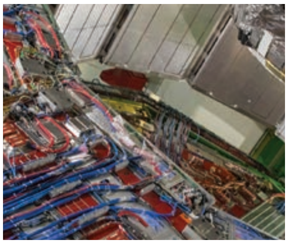
THE FOREIGN SERVICE JOURNAL

Perspectives



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AFSA NEWS
THE OFFICIAL RECORD OF THE AMERICAN FOREIGN SERVICE ASSOCIATION

On the Cover—Illustration by Jeff Moores.

The Legacy of Tex Harris

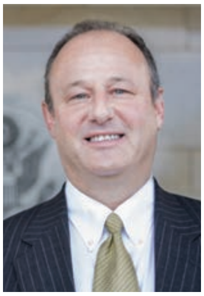
BY ERIC RUBIN

The U.S. Foreign Service lost a giant in February when Tex Harris left us. Tex did more than any single individual to build today's AFSA, and to lay the groundwork for AFSA to serve not only as the voice of the modern Foreign Service, but as its stalwart defender and advocate, as well.

Tex also believed passionately that members of the Foreign Service could not simply count on the goodwill of management, but needed rules and procedures in place to make sure that individual members of our Service were treated fairly and were able to defend themselves.

At AFSA, we take seriously our obligation to defend our members when they encounter difficulties. We are proud that we raised enough money for our Legal Defense Fund so that not one AFSA member who was called to testify in the recent impeachment battle is left with a single cent of liability for legal fees. We also have a significant balance of donations to cover our members facing legal bills in the future—and to defend our association if AFSA itself should encounter legal challenges.

The lessons of the McCarthy period in the 1950s resonate to this day. Hundreds of members of the Foreign Service were investigated, pilloried, persecuted and fired for specious reasons—in some cases for simply doing their jobs, reporting accurately on what they observed, or for being homosexual or suspected to be. At that time, AFSA did not stand up for them.



Our country's security and prosperity depend heavily on our international engagement.

Let me be clear about where AFSA stands today: We will fight for our members, and we will fight for the practice of diplomacy, which is the alternative to war.

We are passionate about our commitment to nonpartisan, nonpolitical service to our country. We will loyally serve whomever the American people elect as their leaders and work assiduously to ensure the success of the policies established by our elected leaders. But we expect respect for our patriotism and service in return.

There are other things to say about the legacy of Tex Harris. More than any other U.S. diplomat, Tex advanced the notion that America is about values, that our country stands for more than just our own self-interest. Along with Assistant Secretary of State Patricia Derian, he pioneered the idea that our diplomacy must include a commitment to basic norms of human rights, and that ignoring or supporting gross violations of those values undermines our standing in the world. His human rights work in 1977-1979 Argentina still stands as an outstanding example for the Service.

Surely we have not always lived up to that standard, to our principles. But the world still needs the United States to be a leader among nations to work for peace and progress. The post–World War II era was shaped by the United States. Its institutions were largely our creation. And the result was the single longest period of peace and prosperity in human history.

We serve our country, with dedication and loyalty. But in working for our country, we work for the world. Our country's security and prosperity depend heavily on our international engagement. No one can or will replace the United States if it withdraws from engagement in the world's affairs. Americans need us—and the world needs us.

Tex also passionately believed in the importance of constructive dissent. The culture of the U.S. Foreign Service, and the value that we bring to the table, emphasizes the importance of speaking truth to power—confidentially and internally—and insists that we can only get the right results in policy deliberations when there is a real discussion informed by career expertise and knowledge.

For those of you considering whether to remain in public service, I repeat the request I have made before. Please stay. Please continue serving our country, and know that the work you do matters—a lot.

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

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LETTER FROM THE EDITOR

Diplomacy in the Time of Corona

BY SHAWN DORMAN

As I write this letter (just before we go to press in mid-March) from Baltimore, AFSA has moved operations to all-remote work in response to the coronavirus outbreak, now pandemic. The president has just held a press conference to announce a "national emergency." Universities are sending students home, sports events are being canceled, and travel restrictions grow by the hour.

News about the spread of the virus and how it's being handled worldwide changes hourly, and the U.S. domestic response is still in the early stages. But from the time the first cases in China were made known, members of the U.S. Foreign Service posted all over the world have been on the front lines, involved in helping track developments, marshal data and information, liaise with foreign governments and international organizations, and keep U.S. citizens informed about public health and travel.

A monthly publication planned far in advance, the *Journal* is not a vehicle for breaking news. The stories, insights and lessons learned from the diplomats grappling with this new world health crisis have yet to be told. When they are, you will find them here.

In the meantime, we continue covering topics relevant to our community, such as this month's focus on career management. We take a close look at some very "inside baseball" elements of managing a Foreign Service career and, in particular, changes to the State HR Bureau (in addition to its new name, Bureau of Global Talent Management), as well as to the evaluation processes at State and USAID (the EER and the AEF).

Shawn Dorman is the editor of The Foreign Service Journal.

We bring you updates on the MSI pilot and the special needs education allowance (SNEA) program, and a look at the Balancing Act organization, which shows how employees can make change happen.

In addition, a special retirement section offers useful guidance on planning and profiles of life after the Foreign Service.

Our April Speaking Out argues against the notion that diplomats are "born, not made." The column's authors make a compelling case for a change in State Department culture and for more systematic training, education and mentoring.

Perhaps the most significant space in the *Journal*, the Speaking Out column is where we can share different views on current issues for the FS community. In recent months, we've received fewer Speaking Out submissions than ideal.

In hopes of inspiring wider participation in the *Journal*, I share here thoughts from Editorial Board Chair Alexis Ludwig.

Ours is an age of hyperventilation. There's quite enough yelling and screaming going on as it is, and no good reason to join in. But how about reasoned dialogue? How about cool-headed argument with one's inside voice? Isn't that what diplomats are supposed to do best, including amid intense and even structural disagreement?

We put forth a dispassionate, broadly informed perspective on a several-sided or controversial topic in the hopes of persuading others to take action, accept a compromise course or at least understand where we're coming from. Such engagement would seem welcome and even tonic at a time like this.

Why am I writing this now? The *FSJ* depends on the Foreign Service community as authors. Right now, we need more submissions for Speaking Out, our opinion page.

Issues worthy of speaking out about are not in short supply. They can be big or small, external or internal, large foreign policy questions or vexing personnel problems. Whatever deserves a fair, transparent or different kind of airing. Whatever might need fixing.

A few possible examples:

- Security clearance updates take too long; here's what needs to be done.
- Here's how to better utilize the diverse professional skills family members bring to the Foreign Service.
- The tangible value of a nonpartisan, professional Foreign Service in a polarized environment.
- Here's what's wrong with the assignment system and a plan to fix it.

Please join the discussion. I urge you to contribute your two cents or more—if only to further ensure that the different sides of issues that matter to us are duly aired, reflected on and argued. Speak Out! Because silence, too, can be deafening.

—Alexis Ludwig

An Inspiring Look at the U.S.

The front section of the January-February *Foreign Service Journal* does a good job in reviewing the challenges of recent months in the President's Views, letters from readers and in excerpts from online postings, and I plan to keep this issue for its apt record of the important current events affecting our Service.

But it was Alexis Ludwig's "Outside Observers See the United States in Ways We Ourselves Cannot" that I found especially profound and uplifting. I recommend it to all who on occasion doubt the grandeur and endurance of the United States' spirit.

With close to 20 years in the Foreign Service now, I found Ludwig's piece not only historically and intellectually well researched and written (as are many *FSJ* articles), but also simply—at the risk of sounding trite—good for my Foreign Service soul.

Kristin M. Kane
Deputy chief of mission
U.S. Embassy Lisbon

Thank You for Your Service

Thank you to all members of the Foreign Service for your service to our country. I write this to pay tribute to what I believe is one of the greatest institutions in the world—the State Department—and to give thanks to all those who serve in this important institution and in the other U.S. foreign affairs agencies.

I have spent half of my career in the State Department, most recently as a director and senior adviser within FSI's Leadership and Management School, and I have worked hand-in-hand with many of you over these years.

Every day across the globe, you work on the front lines to prevent wars from breaking out, protect American citizens, promote economic prosperity, defend democracy and prevent human rights abuses and atrocities. These are noble causes.

Thank you all for your efforts to prevent the spread and use of nuclear weapons, chemical weapons and other weapons of mass destruction. Thank you for engaging in continuous dialogue with our allies and with our adversaries day in and day out, year after year and decade after decade.

Your work to promote and demonstrate democratic values and advance a free, peaceful and prosperous world is largely unseen to most Americans, yet you continue to serve with little praise or recognition.

You serve in challenging environments, often risking your own lives in war zones, in regions where there are dangerous public health epidemics and where the rule of law is oftentimes very little rule at all. There are countless unsung heroes among you who devote time, energy and internal fortitude toward serving our country and promoting the security of Americans in large and small ways.

Many of you spend years separated from family, often missing your children's special milestones, such as graduations, performances and more. Sacrifice is required on a continuous basis to carry out the work that is required to help protect America and our values.

Even where the circumstances sometimes appear hopeless and where authoritarian regimes have been in power for many decades, you press on with the work at hand and challenge those seemingly overwhelming obstacles. You challenge powerful dictators and entrenched authoritarian regimes, often in face-to-face encounters and on their home turfs. You press on.

You are American diplomats and public servants who have brought American ideals and values to the rest of the world for decades—showcasing America as a powerful ideal and a counterweight to the allure of centralized authoritarian rule that has captured much of the world's population for decades.

You work in an organization that is not without its faults, and you face many of the same challenges that come with any large institution. You have no choice but to operate under conditions that are often constrained by regulations and layers of internal safeguards that have been put into place to help ensure the integrity of the organization and provide accountability to the American people.

But you overcome these and other hurdles, and strive on a daily basis to deliver excellence in service to our great country and to all Americans.

Thank you for doing all this and more.

Joseph Domask
DoMar Learning & Leadership founder
Potomac, Maryland

Your Special Collection on McCarthyism and the China Hands

I learned about your addition of a new special collection on McCarthyism from a recent AFSA Daily Media Digest. I applaud the timeliness of this initiative, and would respectfully suggest several additions for the sake of completeness.

From the July-August 2008 *FSJ*, the following should also be on that list: the letter from Ambassador Robert Service, "Getting History Wrong"; the letter from Dana Deree, "Smearing the China

Hands"; and my article, "Grace Under Pressure: John Paton Davies." I would note that the latter was cited by historian Bruce Cumings in his epilogue to Davies' autobiography. [All of these can be found in the FSJ Archive at www.afsa.org/fsj-archive.]

Bob Rackmales
FSO, retired
Belfast, Maine

A Puzzling Statement

Kudos for the excellent interview with Ambassador Hank Cohen in the December *FSJ*. We can be grateful for his service and expertise in navigating the waters of post-colonial Africa.

One of his comments puzzled me, however: "The Cold War never had any influence on U.S. policy toward Africa." I believe volumes could and have been written saying that it did, and this was certainly my experience during my tours in Ethiopia and South Africa in the 1970s and 1980s.

Chuck Ahlgren
FSO, retired
Incline Village, Nevada

CORRECTION

In the March *FSJ* focus article "When Lightning Struck Twice: Drawing Down Mission Russia," Sergei Skripal is mistakenly identified as a former officer of Russia's Federal Security Service (FSB) on pp. 39 and 40. Skripal was an officer of the Russian Main Intelligence Directorate (GRU). We regret the error.

Please send your letters to journal@afsa.org

RESPONSE TO DEC. 2019 *FSJ* COVER STORY ON USAID TRANSFORMATION

The Purposes and Use of Foreign Economic Assistance

BY RAYMOND MALLEY

I reflected with great interest on Chris Milligan's article, "USAID Transforms," in the December 2019 edition of the *Journal*. It is heartening to hear that the agency continues to reform to keep up with the times, and I presume that the changes in structure are substantive and not mere movements on the administrative tableau.

But I have two comments.

What About the Overlap?

First, in addition to USAID, U.S. economic assistance relations with developing countries are the prime responsibility of four other agencies—namely, the Peace Corps, the Millennium Challenge Corporation, the U.S. International Development Finance Corporation, formerly the Overseas Private Investment Corporation, and the U.S. Trade and Development Agency.

Also, major departments of government—such as State, Treasury, Justice, Agriculture and others—have assistance spigots in their areas of competence.

Many of the USAID reforms Mr. Milligan mentions affect and overlap with the work of these other agencies. Some examples: USAID and MCC often support development projects in the same country; all agencies stress private-sector and free-market-based approaches where possible; MCC and DFC, in addition to USAID, seek to co-finance with the private sector; the State Department also has major programs in health and humanitarian activities; and State, USAID and Treasury manage relations with the various multilateral development institutions.

I assume that USAID took into account and discussed with these agencies how the reforms relate to and affect their responsibilities and operations, and that there are no problems in this regard. But, surprisingly, there is no mention of other agencies in the article.

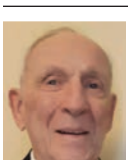
The Question of Purpose

My second comment relates to the purposes of foreign assistance. Mr. Milligan writes that "the purpose of foreign assistance should be to end the need for its existence. All of our reforms are designed to accelerate development progress and work toward the day when partner countries can finance and implement solutions to their own development challenges."

In my view and long experience, this statement is too narrow. True, the prime purpose of foreign assistance is to foster economic and social development. In practice, however, that is far from the *only* purpose. Under every administration, USAID has been and continues to be a soft foreign policy tool with an array of purposes. It is a flexible instrument, never used solely for development—no matter how much purists wish it were so.

The additional purposes of USAID's work over the years and today are legion. Many, of course, are closely related to development, but some are only tangentially related and others are not related at all. Here are some examples of other purposes: to reduce civil strife and create stability, including in failed states; to supply humanitarian assistance to the world's numerous refugees inside and outside camps, and to assist victims of natural disasters such as hurricanes and earthquakes; and to promote countries' transitions to democracy and free markets, as was so important with the collapse of the Soviet Union and Yugoslavia.

Still other purposes are to support friends and allies, even authoritarians if necessary, such as South Korea's Park Chung-hee and Zaire's Mobutu Sese Seko yesterday and Egypt's President Abdel Fattah el-Sisi today; to spread influence and help counter the influence of adversaries, as in Eastern Europe and the South China Sea right now; and to uphold integral parts of treaties—for example, assistance to Israel and Egypt under the Camp David Accords.



Raymond Malley, a retired Senior Foreign Service officer, had a long and varied career with USAID and State. He negotiated and managed development and security projects in many countries, including Korea, India, Nepal, Pakistan, Bangladesh and Congo/Kinshasa; was U.S. representative to OECD's Development Assistance Committee; and was USAID's contact with U.S. International Development Finance Corporation and Treasury. He also briefly headed the U.S. Trade and Development Agency. Later, he was a senior executive with the global Korean manufacturing group Hyun Dai/Halla. He lectures, writes and teaches at Dartmouth's lifelong learning program. He and his wife live in Hanover, New Hampshire, and McLean, Virginia.

Multiple Objectives

Further, U.S. assistance is supposed to support major foreign policy initiatives and complement military operations, as in Vietnam, Iraq and Afghanistan; assist in acquiring the use of foreign military bases; and support U.S. exports and investments in developing countries and create future profitable markets. (Note that DFC and TDA were created within USAID; when proved successful, they were spun off under pressure from U.S. business interests.)

Of rapidly growing importance today, assistance is also used to address major issues that transcend boundaries, such as global warming and the great number of problems that stem from it, as well as diseases, possible pandemics, population pressures and mass migrations.

USAID collaborates with other parts of the U.S. government and bilateral and multilateral donors in most of these undertakings, and it contracts with numerous companies, universities and nongovernmental organizations. It also represents the United States on the Development Assistance Committee of the Organization for Economic Cooperation and Development in Paris and often to United Nations agencies in Rome and elsewhere.

Are many of these wide-ranging activities likely to disappear or decline in importance in the near future? Of course not. Can the United States as a country cease to address them? No. Thus, it follows that we must continue to have mechanisms, skilled personnel and budgets to deal with them, even if—and this is most unlikely—most or all of the world's countries reach satisfactory levels of economic and social development.

More Efficient Organization

These skills and budgets need not be centered in USAID, but they must be housed somewhere. Given political realities, it is likely that things will remain as they are for the time being.

That said, there are better ways to organize these necessary capabilities that would result in greater efficiency and substantial administrative savings. One is to merge MCC into USAID. USAID would be the major partner in such a merger, but the MCC name would better describe the wide range of responsibilities and activities. Or create another name.

Our country then would have two main foreign economic assistance operating entities—the merged USAID/MCC, dealing with most of the matters outlined above; and the DFC (merging the smaller TDA into it), promoting finance and private investment in, and trade with, developing countries. Some donor countries do, in fact, divide their assistance organizations in this way.

Yet another approach would be to merge USAID into State as a separate bureau and specialty; now the two are partly joined and partly separate. At the same time, State could seek control of or greater influence over the other assistance spigots. I have discussed these options in previous *FSJ* articles (see Speaking Out in December 2010 and November 2009).

The Future

We live in complex and turbulent times. World problems will continue to accumulate as the decades pass. Most of them can be addressed only with substantial and wise use of soft power. That is the argument for a continued and expanded organization like USAID, suitably transformed for the long term.

GAO Report: State Department Struggles with Diversity

While the overall proportion of racial and ethnic minorities at the State Department has grown in recent years, the proportion of African Americans and women serving in the department has declined, according to a Feb. 25 report from the U.S. Government Accountability Office.

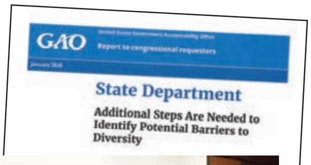
From 2002 to 2018, the proportion of racial or ethnic minorities among the department's full-time, permanent career employees increased from 28 to 32 percent. On the Civil Service side, the proportion of minorities decreased slightly from 44 to 43 percent, while in the Foreign Service, the number increased from 17 to 24 percent.

Though the overall number of department employees rose from 16,570 to 22,806 during that time frame, the proportion of African Americans fell from 17 to 15 percent of all employees, GAO found. The proportion of African Americans in the Civil Service decreased from 34 to 26 percent from 2002 to 2018, while it increased from 6 to 7 percent in the Foreign Service over that time.

The proportion of women in the Civil Service decreased from 61 to 54 percent from 2002 to 2018, while the proportion of women in the Foreign Service increased from 33 to 35 percent.

The proportion of minorities and women was much smaller at higher ranks, GAO found. For example, women make up 69 percent of jobs at GS-10 or below, but only 38 percent of executive-level jobs in the Civil Service. Minorities make up 65 percent of jobs at GS-10 or below, but only 13 percent of executive jobs.

"State has implemented several plans, activities, and initiatives to improve diversity and representation throughout the ranks of its workforce," GAO stated, adding, "However, longstanding diversity issues persist at the agency."


GAO

State Department

Additional Steps Are Needed to Identify Potential Barriers to Diversity

AFSA/KIM GREENPLATE

Senator Bob Menendez (D-N.J.), at podium, hosts a briefing on the GAO report on Feb. 25. On the panel are, from right, AFSA Director of Professional Policy Issues Julie Nutter, Ambassador (ret.) Mari Carmen Aponte, GAO's Director of International Affairs Jason Blair, and Ambassador (ret.) Gina Abercrombie-Winstanley.

"State may have an incomplete picture of issues affecting diversity in its workforce," GAO noted. "Taking additional steps to identify diversity issues could help State properly direct its resources to investigate, identify, and remove barriers to a diverse workforce."

On Feb. 25 AFSA Director of Professional Policy Issues Julie Nutter participated in a congressional briefing on the report, hosted by Sen. Bob Menendez (D-N.J.) and Sen. Ben Cardin (D-Md.).

"The results of this important report unfortunately show that despite some laudable efforts, the Department of State has yet to cultivate the kind of diverse and representative national security workforce we need," Sen. Menendez, ranking member of the Senate Foreign Relations Committee, said in a Feb. 25 statement.

"Whether we are talking about the boardrooms of the Fortune 500 or the upper echelons of government, something is wrong when most of those occupying our most powerful positions are overwhelmingly male and overwhelmingly pale," stated Menendez.

View the report at bit.ly/gao-diversity.

Trump Envoys Push Out Career Diplomats

On Feb. 5, *Foreign Policy* magazine featured an exclusive report about an issue AFSA has been watching closely—the pushing out of career diplomats by some political-appointee ambassadors.

President Donald Trump's envoys have removed their deputy chiefs of mission (DCMs) in South Africa, Canada, France, Iceland, Romania and the United Kingdom, *Foreign Policy* reports. Some of the ambassadors did so shortly before or just after they arrived at post.

"We are deeply concerned by the number of removals of deputy chiefs of mission overseas, which are happening at way above the normal pace," AFSA President Eric Rubin told *Foreign Policy*. "It's generally very rare for a DCM to be removed by the ambassador. It does happen. Sometimes it happens for a good cause. But it's rare. And it is now becoming an epidemic."

FP reports that in past administrations, career officials, including DCMs, "felt they had the support of the State Department if their ambassadors were causing issues."

Lewis Lukens, who was ousted as DCM from U.S. Embassy London in 2018, told *FP*: "When I was being told I had to leave seven months early, the answer from the department was, 'Look, the ambassador is a friend of the president's, he's a friend of Trump's, and there's nothing we can do.' I imagine that some of these other people are facing that same situation."

Site of the Month: *Mapping the Coronavirus (bit.ly/cor-virus-map)*

AS OF MARCH 13, 2020

If you're interested in tracking the COVID-19 coronavirus, Johns Hopkins University's Center for Systems Science and Engineering has put together a dashboard showing real-time data on the number of patients diagnosed with the virus, the number of deaths and the number of people who have recovered by country.

The dashboard also features a map that lets you track where coronavirus cases have been found. At press time, there were 136,929 confirmed cases of coronavirus worldwide, and 5,065 deaths, according to the portal. CSSE uses several data sources, including the World Health Organization and the Centers for Disease Control and Prevention.

The dashboard was first shared publicly on Jan. 22. "It was developed to provide researchers, public health authorities and the general public with a user-friendly tool to track the outbreak as it unfolds," according to Lauren Gardner, an associate professor in JHU's department of civil and systems engineering.

White House to Purge "Disloyal" Feds?

The White House confirmed that it is seeking out disloyal employees in federal agencies, *Government Executive* reported on Feb. 25.

"It's not a secret that we want people in positions that work with this president, not against him, and too often we have people in this government—I mean the federal government is massive, with millions of people—and there are a lot of people out there taking action against this president and when we find them we will take appropriate action," White House spokesperson Hogan Gidley told Fox News on Feb. 24.

This follows a Feb. 23 report on the online news website Axios that over the past 18 months the Trump administration has "assembled detailed lists of disloyal government officials to oust."

According to a Feb. 21 *Washington Post* article: "The National Security Council, the State Department and the Justice Department are targets of particular focus, according to two administration officials, and there have recently been multiple resignations and reassignments at each of those agencies."

Yovanovitch Wins Trainor Award

Ambassador Marie Yovanovitch, who retired from the Foreign Service not long after testifying in the impeachment hearings, received the Trainor Award on Feb. 12 from Georgetown University's Institute for the Study of Diplomacy.

The award is presented annually to an outstanding American or foreigner who has shown distinction in the conduct of diplomacy.

"We need to build a constituency among Americans," Amb. Yovanovitch said in accepting the award. "Over the last few months, I have received hundreds of letters, from all over the United States, from individuals thanking me for explaining what diplomats do. Clearly, we need to do a far better job at communicating our story."

Ambassador (ret.) William Burns joined Yovanovitch on the stage for a question-and-answer session following her remarks. You can view the event at bit.ly/trainor-award.

United States, Taliban Reach Peace Deal

The United States signed a peace deal with the Taliban on Feb. 29 in Doha, marking the potential end of America's longest war. But media reports suggested that key elements of the agreement were starting to buckle just days later.

The agreement includes a 14-month timetable for the final withdrawal of U.S. troops from Afghanistan, according to a Feb. 29 *New York Times* report.

In exchange for the withdrawal of U.S. troops, the Taliban promises to cut ties with al-Qaida, the terrorist group responsible for the 9/11 attacks, and prevent the use of Afghan soil to threaten the United States and its allies.

Hours after the agreement was reached, the insurgent Taliban and Afghan security forces had resumed fighting, *Politico* reported on March 2, "marking an end to the reduction in violence that paved the way for the agreement."

Also on March 2, the Taliban refused to take part in talks with the Afghan government, *Politico* reported, until the government releases 5,000 Taliban prisoners. Under the terms of the peace deal, the government-held prisoners were to be released in exchange for up to 1,000 Afghan captives held by the Taliban by March 10. On that date, according to the agreement, the Taliban was to start intra-Afghan negotiations.

On March 1, Afghan President Ashraf Ghani—whose government was not involved in the negotiations or the U.S.-Taliban deal—told reporters that "there is no commitment to releasing 5,000 prisoners."

"The request has been made by the United States for the release of prisoners, and it can be part of the negotiations, but it cannot be a precondition," he added.

"No one is under any illusion that this will be straightforward," Secretary of State Mike Pompeo told CBS News' "Face the Nation" on March 1. "We have built an important base where we can begin to bring American soldiers home, reduce the risk of the loss of life of any American in Afghanistan, and hopefully set the conditions so the Afghan people can build out a peaceful resolution to their now, what for them, is a 40-year struggle."

The New York Times added that the war has cost $2 trillion and taken the lives of more than 3,500 American and coalition troops and tens of thousands of Afghans. About 12,000 troops were still in Afghanistan at the time of the peace deal.

50 Years Ago

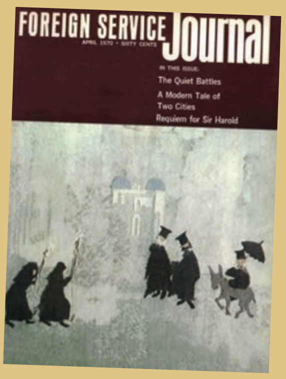
The Quiet Battles

Recently, in a course on American society, I tried to convey to my students some impression of what it was like being a bureaucrat, in my case, a Foreign Service officer. …

At twenty-two, when I entered the Foreign Service, one of the first things I learned was that the Organization was not simply an extension of my personal development. It had work to be done, and this perforce took priority over the work's interest or usefulness to me. …

By the time an officer has the opportunity to exercise a satisfying amount of initiative will he still be able to? How much will the "system" get to him…? This, I believe, depends on him, on his quiet day-to-day battles with himself, on his ability to live fully into his experiences, to retain effectiveness without losing purpose, to retain purpose while implementing other people's ideas. It may thus mean being able to hold two ideas in his head at once, the official one, the one he may disagree with but implements, and his own, the one he hopes to introduce, quietly and effectively, perhaps years hence at the proper time. …

A bureaucratic career does pose moral dangers. It can be thought of as a series of battles, some of which will be lost. They are quiet battles and often lack the glamour of sit-ins and picket lines, but they are no less, and perhaps are more decisive for the future of society.



—Craig R. Eisendrath, a former Foreign Service officer, excerpted from his article of the same title in The Foreign Service Journal, *April 1970.*

The Costs of Reconstruction in Afghanistan

On Feb. 5 the Special Inspector General for Afghanistan Reconstruction reported that there were 5,135 casualties in Afghanistan associated with reconstruction or stabilization between April 2002 and December 2018.

That number, according to SIGAR, includes at least 284 Americans (216 U.S. service members and 68 U.S. civilians) who were killed in Afghanistan. SIGAR found that an additional 245 U.S. service members and 76 U.S. civilians were wounded.

The report, "The Human Cost of Reconstruction in Afghanistan," is believed to be the first official accounting by an independent agency of the human costs of reconstruction in that war zone.

SIGAR found that 2,214 people were killed and 2,921 wounded during the time period. It also identified 1,182 people who were kidnapped or went missing. The majority of casualties occurred between 2008 and 2011, the height of reconstruction efforts according to SIGAR.

"While considerable effort is made to track the amount of U.S. dollars spent, this review shows that we do not adequately capture the human cost of conducting reconstruction and stabilization projects while combat operations are still ongoing, especially third country nationals and Afghans," the report states.

Freedom House Finds Global Democracy on Wane

Democracy is under assault around the world, according to Freedom House's "Freedom in the World 2020" report, released on March 4.

"This year's report is deeply concerning, in that it finds that we are in the 14th year of a global recession in democracy," says Freedom House president Michael Abramowitz. "Almost twice as many countries declined in their scores this year as improved, and those declines aren't just happening in places that you expect, like China or Russia, but also in established democracies."

Over the past few years, the United States' democracy ranking has fallen several points, to 52nd on the list of 195 nations and 15 territories, according to the report. With a democracy score of just 86 out of 100, the United States falls behind Slovakia and Mauritius but just ahead of Argentina and Croatia. A decade ago, its ranking was on par with the United Kingdom and Switzerland.

Twenty-five of 41 established democracies in the world have seen net losses in democracy since 2006, according to the report. "The most common areas of decline," writes the report's author,

Contemporary Quote

> I'm confident we can handle it here. I'm confident we'll handle it better than any nation in the world.
>
> *—Secretary of State Mike Pompeo, in response to a question about whether the United States could have as successful a response as China without imposing on people's civil liberties, during an interview with CNBC, March 6.*

Sarah Repucci, "took place in functioning of government, freedom of expression and belief, and rule of law."

View the document at bit.ly/freedom-report.

U.S. to Allow Greater Use of Land Mines?

In January the Trump administration rescinded the presidential policy on anti-personnel land mines adopted by the Obama administration in favor of a new policy to be overseen by the Defense Department that will allow land mines to be used in conflicts around the world.

The previous policy restricted the use of land mines to the Korean Peninsula.

"I think land mines are an important tool that our forces need to have available to them in order to ensure mission success and in order to reduce risk to forces," Secretary of Defense Mark Esper told journalists on Jan. 31.

According to the Defense Department policy, the U.S. will continue to prohibit the use of any "persistent" land mines (without a self-destruct/self-deactivation function) per its commitment to the Convention on Certain Conventional Weapons.

The United States did not join the more than 160 countries that signed on to the 1997 Mine Ban Treaty. Russia and China have not signed the treaty either.

"I've seen nothing in my study of Russian or Chinese history that gives me any confidence that they would respect international law," Lt. Gen. Ben Hodges, a former commander of U.S. Army Europe, told NPR. "So this is about being able to protect allies and protect our own troops."

But many are opposed to the use of what they see as inherently indiscriminate weapons. The current policy, said Senator Patrick Leahy (D-Vt.) in a Jan. 30 statement, "is the culmination of nearly 30 years of incremental steps, taken by both Democratic and Republican administrations after extensive analysis and consultation, toward the growing global consensus that anti-personnel mines should be universally banned."

"The Congress," Sen. Leahy added, "must be consulted before any decision that would reverse the gains we have made toward ending the carnage caused by land mines."

Senators Urge Field-Forward Policy

In early February, Sen. Chris Van Hollen (D-Md.) and Sen. Dan Sullivan (R-Alaska), co-chairs of the Senate Foreign Service Caucus, sent a letter to Secretary of State Mike Pompeo urging him to increase the deployment of members of the U.S. Foreign Service overseas.

"From global health crises to emerging technologies to great power competition, the United States faces a diverse and growing array of threats that demand greater diplomatic engagement around the world," they wrote. "In addition to our military and economic tools, diplomacy is essential for advancing U.S. national security interests."

"Posting more State Foreign Service abroad," the senators continued, "coupled with an increase in the Foreign Commercial Service and Foreign Agricultural Service, will help underpin U.S.

Heard on the Hill


JOSH

Proud to Help Foreign Service Families

Foreign Service officers play a crucial role in furthering our national security interests and promoting our values abroad, and their patriotic family members endure frequent moves to support that service. I'm proud to co-sponsor this bill to help remove the hurdles that make it difficult for Foreign Service families to access job opportunities.

—Sen. Tim Kaine (D-Va.), in a Feb. 7 press release on the Foreign Service Families Act.

Supporting Commercial Policy

We're also putting commercial diplomacy at the forefront of our foreign policy to help confront China around the world through bills like my Championing American Business Through Diplomacy Act. The original mission of the Foreign Service was to advance American interests, American business interests. It's in their charter, and yet many diplomats seem to forget that that is a fundamental mission of the State Department, to advance our business interests abroad.

—Rep. Michael McCaul (R-Texas), from remarks at a Feb. 4 American Enterprise Institute event in Washington, D.C., "How to Counter China's Global Malign Influence."

Funding USAID

Let me start by once again acknowledging the good work that you are doing at USAID and the collaborative manner in which you do it. These are not easy times to be engaged in international development: the challenging operating environments from insecurity continue to mount as do the needs of those we aim to help. I salute your dedicated cadre of development professionals that too often are working in or near very dangerous circumstances. …

Turning to the matter at hand, the president's budget request for Fiscal Year 2021 is nearly a 20 percent cut from the Fiscal Year 2020 enacted budget. I look forward to working with the chairwoman in the weeks ahead on a bill that provides more appropriate levels of funding to address the serious global challenges that we are confronted with this year.

—Representative Hal Rogers (R-Ky.), ranking member of the State, Foreign Operations and Related Programs Appropriations Subcommittee, at the hearing on the USAID budget request for FY 2021 with USAID Director Mark Green, March 3.

Telling the Truth

There are some 24,000 Civil and Foreign Service officers, Mr. Secretary, who are also listening to you right now. They know that they have a duty to implement this president's policies and they do. You called them just a moment ago "amazing people." You know they're not working against this president. But they also feel they have a responsibility to share with you and their president their best judgment to tell you the truth as they see it, whether it's what the leadership wants to hear or not. … Are you going to back them up when they speak what they believe to be the truth? Are you going to stand by while people in the White House talk about purging your employees?

—Rep. Tom Malinowski (D-N.J.), questioning Secretary of State Mike Pompeo at a House Foreign Affairs Committee hearing, Feb. 28.

global leadership and economic competitiveness, strengthen linkages between the U.S. and other countries, and contain Chinese influence abroad."

In their letter, the lawmakers cite the Lowy lnstitute's "2019 Global Diplomacy Index" to underscore the urgency of increasing the U.S. diplomatic presences abroad. According to the index, China now has the largest diplomatic network in the world.

The senators request specific data from State and pose several questions about the pattern of diplomatic postings in recent years and going forward, stating that they would welcome the opportunity to meet with the Secretary in the near future to discuss this important issue.

AFSA has long promoted a field-forward Foreign Service to restore America's core diplomatic capability.

This edition of Talking Points was compiled by Cameron Woodworth.

Breaking Away from "Born, Not Made"

BY ANDREA SUSANA MARTINEZ DONNALLY AND CHRISTINA T. LE

Without a more significant investment in education, we are abdicating our responsibility to prepare the next wave of diplomats.

The Department of State's Diplomatic Readiness Initiative hiring surge from 2001 to 2004 included active recruitment for specialized languages and experiences. The expanded hiring should have been matched with relevant changes to our organizational culture and accompanying systems like promotions, education, evaluations and assignments. Unfortunately, it was not. It is often said by department leaders that great diplomats "rise to the top" and "hard work is rewarded," but it isn't clear how a person's efforts will deliver promotions and opportunities. In fact, what allows some to rise over others?

Director General Carol Perez's recent personnel reform efforts have sounded the alarm, highlighting the need for a new organizational culture. But her endeavors alone will not right the ship of State so long as our community continues to act on our antiquated thinking, and our personnel systems do not fully capture or keep pace with the diversity of our people. The rigid institutional identity underlying these systems—which can be summed up as a belief that diplomats are "born, not made"—remains pervasive.

This organizational culture is preventing the State Department from realizing the full potential of the wide spectrum of people that make up our department, including not only the ethnic, racial and religious diversity of our colleagues, but also nontraditional structures such as international or interagency marriages, single parents, divorced tandem spouses and second-career professionals, among others.

The situation, perpetuated now by mostly outdated systems, is unlikely to change unless we are aware of our outdated views of the traditional workplace and break with this arcane thinking. It is incumbent upon each of us to recognize that diplomats should be *made* with experience, mentorship and training, and that it is essential that the department modernize the personnel systems on which we rely to ensure they reward talent and merit (not simply years of service).

Training: Ready, Set, Diplomat

We describe ourselves as learned, and the Foreign Service Act of 1980 explicitly directs the executive branch to develop a corps of well-prepared officers, "representative of the American people" and "informed of current concerns and trends in American life, knowledgeable of the affairs, cultures and languages of other countries." If the department's role is to conduct foreign policy, it would stand to reason that continuous education is important.

Yet although we pride ourselves on being smart, we do not hold education in high esteem. Many among us have fondly referred to learning the art of diplomacy as "on-the-job training." A more accurate descriptor is "learn as you go." Newly arrived staff at a post, including first-tour officers, are lucky if they receive notes handed over by their predecessors. The majority of training (not education) a generalist receives throughout their career is in foreign languages or technical skills (e.g., budgeting and contracting).

Mandatory leadership training for mid-level specialists and generalists is given for

Andrea Susana Martinez Donnally joined the State Department Foreign Service in 2004 after six years as an international trade specialist with the Foreign Commercial Service. She has served in Colombia, Iraq, Tunisia, India and Cyprus, in addition to assignments in Washington, D.C. After joining the department, she married and now has three young children, a dog and a working partner.

Christina T. Le joined the Foreign Service in 2009 and has served in Mexico, Greece and Japan, as well as in Washington, D.C. She was president of the Asian American Foreign Affairs Association from 2015 to 2018. She was a co-recipient of the 2017 William R. Rivkin Award for Constructive Dissent and a National Security Fellow at the Center for a New American Security.

three weeks over a normal career of more than 15 years, and our orientation courses for new Foreign Service generalists and specialists last six weeks and three weeks, respectively. Civil Service foreign affairs professionals receive just a one-week orientation in most cases.

Modules in some of these courses focus on leadership development, including a new leadership capstone project in A-100. There is also a separate "One Team" course for newly hired employees that brings together various employment categories to learn about the department's mission, culture and history. These are steps in the right direction, but are not nearly enough to develop the corps of leaders the department needs at every level.

Specialized skills courses in, for instance, negotiations, crisis management and public speaking taught by experienced officers are only infrequently available and not required. These are skills that should be taught, not learned ad hoc on the job.

By comparison, a Marine Corps officer receives 2.5 years of initial training, including learning the culture of the institution, followed by additional training throughout their career.

At State, employees can take rotations and assignments outside the department, but doing so sometimes comes with a cost. For some FSOs on detail assignments, promotion is delayed because the panels, reflecting State culture, do not view learning as part of our work. Attending long-term education programs in some cases even carries a negative stigma. Often, it seems, detail assignments and long-term training are viewed as resting sites for returnees from high-stress posts and as last resorts for undesirable officers lacking onward assignments.

Without a more significant investment in education, we are abdicating our responsibility to prepare the next wave of diplomats. While we have been hiring from a much wider scope and breadth of backgrounds and education, our failure to invest in education undermines retention and sets up the next generation of diplomats to be less effective.

Promotions: A Departmentwide Writing Contest

The recently renamed Global Talent Management Bureau (previously HR) brought thoughtful changes to the evaluation process in recent years by making the form shorter and granting employees a greater say in their self-evaluation. However, for all the changes, it remains subjective. Unlike the pass/fail Civil Service evaluations or the private sector's various metrics-based evaluations, there are few quantifiable criteria or comparable data for the promotion panels to use.

Moreover, promotion panels are not a trained, professional cadre of evaluators; rather, they are a jury of our peers, with their own widely differing biases, standards and criteria. Research shows that objective rules tend to be applied rigorously to out-groups (those who are different from "us"), but leniently to in-groups (those who share commonalities), and that this effect is more pronounced when review criteria—for example, the core precepts—aren't clearly specified or taught.

It is very likely that our promotion and awards systems are accentuating biases that are slowing down promotions for some over others. For instance, according to a 2019 study in *Frontiers in Psychology*, research shows that women are often hired based on their accomplishments, while men are hired based on their potential. If Foreign Service evaluations are supposed to be an assessment of future potential, how might this affect advancement?

According to LeanIn.org, research on bias has also shown that replacing a woman's name with a man's name on a résumé improved the odds of the woman being hired by more than 60 percent. Similarly, a 2017 study published by *Harvard Business Review* noted that hiring rates doubled when names were made "whiter." Why wouldn't this apply to promotions, too?

With raters and reviewers' biases playing an outsized role in the advancement of our employees, how does even the best panel then take up the task of comparing one officer's accomplishments during a crisis in a politically volatile country to another officer's accomplishments maintaining a strong bilateral relationship in an economically and politically stable country?

More important, 90 percent of the evaluation focuses on accomplishments and less than 10 percent on areas for development. While feedback from panels routinely indicates that the area for improvement should not be a throwaway, using the space correctly nonetheless remains an exercise informed by rumor and potentially false assumptions (e.g., never list "interpersonal skills").

This is not conducive to developing the skills necessary to advance in one's career, nor does it help the department build a professional corps of expert diplomats; and it reinforces the "born, not made" mindset.

One way to expand on an already positive trend is to shift into name-redacted, gender-neutral evaluations and awards, as was done in the new Meritorious Service Increase process in

2019. The launch of online and classroom unconscious-bias awareness training is welcome, and should be made mandatory for everyone.

Evaluations can further evolve to include a score, so that the evaluation is less dependent on the rater's and reviewer's writing skills. We can also look at ways to make evaluations more concrete and link them to onward assignments.

Assignments: Who You Know, Not What You Can Do

Bidding instructions in 2019 urged people to consider their qualifications before bidding. It was a mixed message, because experience tells us that it's not skills and qualifications that get jobs, but personal connections. This undoubtedly holds true for bureaus that employ centralized bidding processes, despite their claims to be open and transparent. Reaching the Senior Foreign Service and being hired into the Senior Executive Service require a well-rounded career, and this is a function of the assignment process and the accessibility of opportunities for professional growth.

When assignments are a crucial part of an officer's education and development, it is easy to see how the belief that "diplomats are born, not made" is upheld. The culture of the department tells us the best officers will shine through and rise above the rest, naturally. Another way to put it: If you are good, you will get the best projects, the best jobs and the promotions. Yet reality has shown us that doing more work is not necessarily the right way to get promotions or good onward assignments, and the allocation of those opportunities is subject to the will of your boss and who you know.

A backlash against bad managers, "screamers," who effectively manage their corridor reputations to their own benefit led to a revolution in the assignments process in 2006: the introduction of the online 360 evaluation. In theory, it would give voice to subordinates to help weed out those officers who were best at "kissing up and kicking down," as we call it. It is welcome news that recently one more bureau joined the shared 360 platform.

That said, the current format for 360s is not much more than a digitized rumor mill and extension of the corridor reputation that is often manipulated, lacks Equal Employment Opportunity oversight and is unevenly applied across the department.

In the best scenario, the soon-to-be launched TalentMap could revamp the 360 bidding process as the first stop for bidders, with GTM offices reviewing name-redacted and gender-neutral résumés and conducting first-round interviews for all posts. Skills-based interviews with the same questions for all applicants that directly relate to the desired knowledge and skills needed could give hiring managers objective criteria to better match candidates with staffing needs.

Shifting to a preestablished rubric could have a lasting effect on abolishing the favoritism that may be the root cause of the department's failure to be inclusive and diverse, as laid out in the Diversity and Inclusion Strategic Plan.

The Challenge: Now What?

This is our Department of State. We have a Director General heralding a time of change, and we have the power to reshape our institution to become more aligned with our modern world. As a department, we can acknowledge that becoming an effective diplomat is an active effort born of blood, sweat and tears.

We can foster professional growth in our community by mandating and rewarding educational opportunities, and agreeing that long-term training is work for which we should be evaluated and recognized. As a requirement for one's own promotion, we can institute mentoring and professional development of one's subordinates and peers—not only to improve their professional abilities, but to strengthen our department and community.

We can use our referent power to make the institution more inclusive, dynamic and effective. We can continue this conversation through the Director General's open conversations and other dialogues within the department on how to best achieve these aims.

Most important, we can move away from vague definitions of good diplomacy in exchange for defined examples we aspire to replicate. We can identify rules and regulations in the FAM/FAH that preserve the biases that hurt our efforts to become an expert, professional diplomatic corps; and we can advocate for changes to these rules.

By collectively acknowledging and actively working to demand and create a new organizational culture—one where we acknowledge that *diplomats are not born, but made*—we are more likely to achieve the results we seek. In this manner, we are more likely to attract, retain and reward the workforce we both need and have promised the American people. ■

Speaking Out is the *Journal*'s opinion forum, a place for lively discussion of issues affecting the U.S. Foreign Service and American diplomacy. The views expressed are those of the author; their publication here does not imply endorsement by the American Foreign Service Association. Responses are welcome; send to journal@afsa.org.

Needs of the Service and Those of Our People

The New HR

The newly named Bureau of Global Talent Management is taking steps to better recruit, retain and empower a high-performing, diverse 21st-century workforce.

BY PHILIP W. KAPLAN

The goal of any human resources team is twofold: to support employees and to strengthen the institution they serve. It seems simple enough. Just two things. But when they have to be done simultaneously, the balance can be difficult to strike. Lean too far on either side, and you risk undermining the institution or eroding the morale of the people who make it work.

This can be particularly challenging for the Department of State's Bureau of Global Talent Management, formerly known as the Bureau of Human Resources. GTM supports nearly 14,000 Foreign Service specialists and generalists, as well as the department's more than 10,000 Civil Service employees, eligible family members and more than 50,000 locally employed staff. The bureau plays a role in every step of a Foreign Service employee's career—from their entrance exam to their retirement out-briefing, and is involved in all of the relocations, trainings, bidding and assignments, and promotions in between.

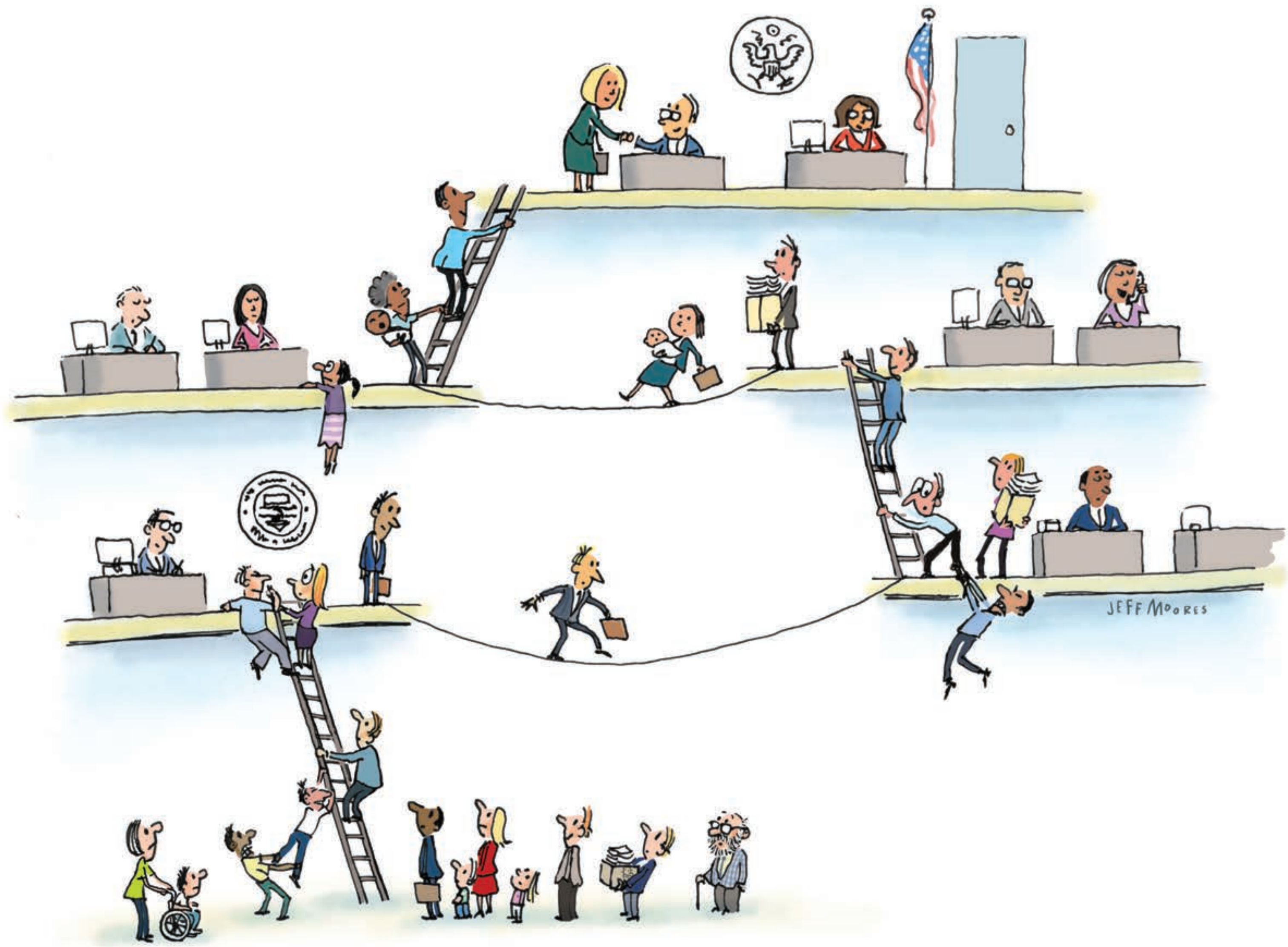
Philip W. Kaplan joined the Foreign Service in 1994. He has served in Santo Domingo, Panama, Ankara, Vienna and Lima, as well as in Washington, D.C., where he is currently acting director for generalists in the State Department Bureau of Global Talent Management's Office of Career Development and Assignments.

Each year, roughly 37 percent of the Foreign Service relocates. Representing the United States overseas is an exciting and rewarding vocation, but not always an easy one. The bureau took on a number of significant reforms in 2019 to provide greater support and enhanced flexibility for employees. These changes, in turn, contribute to the bureau's broader mission to recruit, retain and empower a high-performing, diverse 21st-century workforce equipped to advance U.S. foreign policy goals.

Fair Share: Eliminating an Ineffective Policy

Last July, Director General Carol Z. Perez announced the elimination of the Fair Share bidding requirements, starting with the Summer 2020 assignments cycle. Fair Share was originally designed to ensure equitable burden sharing of service at high-differential posts (the posts with the highest levels of hardship and/or danger), but an analysis of bidding and assignments data revealed that the policy was slowing the assignments process without achieving its desired outcome. The policy required that employees bid on high-differential posts, but not actually *serve* in them.

In practice, departmentwide surveys from 2017 and 2018 on service at high-threat posts revealed, most employees were motivated to bid based on financial incentives, career progression and the desire to serve our nation in the toughest places, not because of the Fair Share policy. Of all high-differential positions on the 2018 assignment cycle, only 5 percent of pan-



eled jobs were filled by bidders subject to the policy. While well-intentioned, Fair Share ended up delaying the assignment process for certain bidders, thereby limiting their opportunities, without contributing to the department's goal of staffing high-differential posts. Its elimination should simplify bidding and make the assignments process more efficient.

The Fair Share policy's elimination should simplify bidding and make the assignments process more efficient.

It should be noted that high-hardship duty is still mandatory for Foreign Service officers who wish to compete for entry into the Senior Foreign Service. Both the Career Development Plan and its successor, the Professional Development Program, include service at high-differential posts among the requirements for entry into the SFS.

The PDP, which is being phased in now and will completely supplant the CDP by 2026, strengthens the hardship standard by requiring FSOs to have completed a 20 percent or greater hardship assignment after tenure, as well as either another tour at a 25 percent or greater differential post or a tour at an unaccompanied post during their career. The CDP requires service at a 15 percent or greater differential post—either one tour after tenure or two entry-level tours. The PDP also allows FSOs more flexibility in meeting the language requirement. Under the PDP standard, officers must test at the 3/3 level (or at the 3/2 level for a hard or super-hard language) any time after tenure. The CDP requires officers to test at the 3/3 level within seven years of opening their window to become eligible for promotion into the SFS.

The PDP for office management specialists contains the same requirements, as will the PDPs for other categories of specialists that will be phased in over the coming years.

Taking Care of People

Several reforms adopted in 2019 provide additional resources for employees to better care for themselves and their families. On Dec. 20, President Donald J. Trump signed the FY 2020 National Defense Authorization Act, which includes the Federal

> **Employees may take leave without pay (LWOP) for up to three years at a time under a new pilot program.**

Employee Paid Leave Act. Under this legislation, which received strong backing from State Department leadership and employee organizations, federal government employees will receive 12 weeks of paid leave following the birth, adoption or foster placement of a child as of Oct. 1, 2020. In a message informing State Department employees of the new law, Director General Perez welcomed the new policy, stating that she had seen far too many federal government employees, herself included, take leave without pay following the arrival of a new child.

The department also implemented reforms designed to provide greater assistance to Foreign Service families with special needs children, including revisions and clarifications to policies and procedures related to the Special Needs Education Allowance. 3 FAM 3280 codifies recent regulatory changes that expand and clarify the services covered by SNEA, including services provided outside a school setting, educational consultants and extended school year services. [See "What's Next for SNEA?," p. 41.]

To support and retain employees facing life circumstances that require extra flexibility, the Director General announced in November that employees may take leave without pay (LWOP) for up to three years at a time under a new pilot program. This additional flexibility will enable employees to address family commitments, learn new skills or recuperate from illness, without having to resign. The Director General has also encouraged bureaus to increase the number of domestic positions eligible for domestic-employee-teleworking-overseas (DETO) arrangements to facilitate assignments for the growing number of tandem employees.

Encouraging a Change in Culture

While some reforms are the result of policy changes, others require a change in department culture rather than the rulebook.

To that end, in a September 2019 cable the Director General encouraged the use of annual leave when possible for employees newly arriving at post. By tradition, Foreign Service employees are expected to begin work on arrival in country, while they are at the same time settling into a new residence and, in many cases, enrolling children in school or arranging childcare.

I remember arriving at one Latin American post with the intention of spending the first week focused on learning my new job and unpacking. My daughter's overzealous high school teachers, however, had other plans; on the first day, they assigned homework that required internet access, which I had to scramble to arrange. At another post, in Europe, my supervisor, a single parent, had to find someone to babysit her two small children so she could attend a front office meeting within 48 hours of her arrival in country. Regulations do not permit the use of administrative leave or consultation days in these situations, but there is no such restriction on annual leave.

In a December 2019 message, the Director General provided guidance for the use of special compensatory time off (SCTO) for employees performing overtime work. While tenured Foreign Service employees are not eligible for overtime pay, they *are* eligible for SCTO in circumstances where work has been ordered and the overtime hours approved in advance. (This does not apply to Foreign Service specialists or to untenured FSOs, who are generally eligible for overtime pay; nor does it apply to members of the Senior Foreign Service, who are not eligible for overtime pay or SCTO.)

Contrary to common perception, the FAM does not limit SCTO to emergencies and VIP visits. It can be applied to any situation in which an employee is assigned official duties outside regular work hours, such as participating in a webinar with an office in another time zone or working the check-in table for an evening Fourth of July event.

More to Come in 2020

Meeting the needs of a diverse and rapidly changing workforce is a moving target, and therefore more changes can be expected this year. Some initiatives are already in the works, including a departmentwide Diversity and Inclusion Plan, a new Manager Support Unit in the Office of Employee Relations and a monthlong program of events to recognize the outsized role that managers and supervisors play in retaining and developing talent.

Other ideas will come directly from the workforce. In May 2019, the Bureau of Global Talent Management launched the DG Innovation Portal, which has received more than 1,000 submissions from employees with ideas on everything from workplace flexibilities to career development. In 2020, GTM stands ready to turn some of these ideas into concrete changes to support employees and strengthen our institution.


JEFF MOORES

Evaluation Reform at State

A Work in Progress

The 2015 EER reforms are the building blocks from which State intends to establish a fully modernized performance management system.

BY ALEX KARAGIANNIS

April is the cruelest month, T.S. Eliot wrote. For Foreign Service personnel who dread employee evaluation season, that poem fragment may have special relevance. In any organization, performance appraisals are a difficult subject; neither assessors nor employees relish them for obvious reasons. No matter how well done, an evaluation touches not just on performance but also on the person's sense of self and identity. For the Foreign Service, with its up-or-out system, employee evaluation reports (EERs) are invariably sensitive. Raters, reviewers and employees all feel pressure. Little wonder that reactions are often defensive and emotionally charged, even when reviews are done well; when done poorly, anxiety levels shoot up.

Over the past decade, considerable work in the private sector by industrial psychologists and human capital experts has produced a revolution in designing performance appraisals that better meet both organizational and employee needs to fuel performance and engagement and also build future leadership capacity. Major firms such as Google, General Electric, Microsoft, Accenture, Cisco and others have revamped their systems to better identify and reward those who merit recognition and/or

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GTM anticipated it would take several years for employees to adjust and adapt to the new system, and several more years to fully embrace it.

promotion and help all employees do better while cutting clutter, complexity and costs, including time often spent on misguided standards and ineffective and inefficient processes.

Mindful of the new developments in this area and the advantages they bring, the State Department made a series of initial reforms in 2015 as preliminary steps toward a more consequential future overhaul of the performance management system. USAID launched a separate reform in 2017-2018 [see p. 32]. Though progress has been limited in the past couple of years, the 2015 EER reforms are building blocks from which State aims to establish, in the near to intermediate term, a state-of-the-art performance management system, including a user-oriented online interface. Director General Carol Perez has made reform a priority and hopes to achieve traction this year. Foreign Service Institute Director Daniel B. Smith is determined to achieve improved leadership and professional training, building on recent pathbreaking reforms.

Further collaboration between the Bureau of Global Talent Management (formerly the Bureau of Human Resources) and AFSA, speaking for the Foreign Service, holds promise to have a genuinely positive impact for employees. A new performance management system would significantly enhance employee confidence; better identify high performers and high-potential employees; cut processing time; deliver promotion results earlier; and have professional development baked into State's corporate DNA.

The 2015 EER Changes

In developing the 2015 reforms, State conducted some 23 information sessions, received more than 2,000 comments from a SharePoint site, reviewed years of selection board reports and recommendations, and collaboratively negotiated with AFSA.

The relatively modest EER changes incorporated structural and cultural elements, as outlined below. Their objectives were to:

- Focus on past performance and project future capacity ("effectiveness areas") rather than describing siloed proficiency in individual components ("the six competencies").
- Focus on goals, outcomes and results rather than tasks, activities and output.
- Emphasize responsibilities (positive), not just requirements (defensive); and reduce the requirements section in the EER (which selection boards did not find especially useful) while retaining it in other documentation.
- Change "Area for Improvement" (a negative) to "Developmental Area" (neutral), recognizing that no matter how strong employees are, they have not achieved perfection and still have scope for growth and professional development.
- Add a new short section for the Senior FS for performance pay, to provide performance pay boards with additional information for that competition.
- Move Meritorious Service Increases to a separate process, in keeping with the Foreign Service Act. (The MSI, commonly mischaracterized as Meritorious Step Increase, is designed to identify and reward exceptionally meritorious service; its language and placement in the FSA—separate from the discussion of promotion—suggests that the act's drafters considered it as rare, not commonplace.)

This change was made in recognition that selection boards are charged with identifying for promotion (future capacity) and under-performance (failure to keep up with the cohort), not taking an overall look at past service and performance. A further aim was to introduce greater equity because some competing groups had too few members to qualify for MSIs under the existing precepts.

Last, the highest numbers of MSIs were being awarded to lower ranks—which had the greatest number of employees eligible for promotion, but where it is less likely that, with relatively limited experience, employees would truly have demonstrated especially meritorious service. By contrast, employees at the mid-ranks and FS-1s had comparatively few MSIs available. The lack of rigor and equity in awarding MSIs was jarring.

- Eliminate classwide reviews. These had required two steps to achieve one total promotion number for each cone (often with necessary adjustments in subsequent years if cones overshot or fell short of projected numbers). Further, they had not achieved their stated objectives for greater diversification and growth across all cones. The data showed that two cones received nearly 70 percent of promotions at the FS-1 and above levels, and some employees received counseling letters for not serving in cone (undercutting the very premise of classwide competition). Also, because classwide reviews came first and were followed by conal reviews, the board seasons slid into October, deep into bid season, before promotion results came out.

• Tighten the narrative boxes to accentuate brevity and clarity; and focus on challenges and significant achievements that demonstrate readiness for greater responsibilities, not merely narrative exposition of lists of activities.

• Introduce a new mechanism to reduce the number and frequency that employees, raters and reviewers had to touch the EER for edits. (Owing to the complexity and limitations of PeopleSoft software, which does not work with Microsoft Word, this shift could not address all employee concerns and administrator needs.)

Prior to the rollout, the Bureau of Global Talent Management conducted numerous information sessions, both in the department and at major overseas posts, and set up an online resource bank that included helpful hints and guides (e.g., on distinguishing between performance and potential, and on avoiding loaded and coded language and implicit or unconscious bias). GTM anticipated it would take several years for employees to adjust and adapt to the new system, and several more years to fully embrace it. Given the turbulence with the presidential transition, workforce reductions and Secretary of State Mike Pompeo's other management priorities, that timetable ran into additional headwinds.

It is important to highlight that the 2015 EER reform was not designed to—and did not—influence the calculation of promotion numbers. Contrary to some misperceptions, determining promotion numbers is a separate and independent process. In 2017 the numbers were at the lower edge of the prior five-year averages, reflecting senior executive decisions. Numbers have subsequently crept back up, but again irrespective of the EER revamp.

Assessing the Changes

Performance management reform did not occur in a vacuum, but in concert with other changes. Overall, it can be regarded as a guarded net positive, though with mixed results in some areas. Promotion results are now released around Labor Day, enabling employees to better design bidding strategies. Adoption of a departmentwide reference bank for bidding (eliminating duplicative bureau-run programs) and establishment of more cogent and useful questions for assignment decisions further streamlined processes that employees had long identified as troublesome. The reference bank was designed to give employees and bureaus better information for assignment decisions, separate from the promotion system, but also with the intent of reducing burdens on employees and assessors.

Thanks to the Foreign Service Institute, employees now have updated, more refined and useful leadership training modules

Advice on Writing EERs

FOR RATERS/REVIEWERS

- Hold frequent, rich conversations, ideally ones that are forward-looking.
  - Identify strengths and areas for development or growth.
  - Offer stretch responsibilities—not regarding grade/rank, but within existing assignment.
  - Help employee get experience and step up to future challenges.
- Build toward the EER: Use formal and informal sessions to have a continuous dialogue (evaluations are continuous and progressive, not a one-time event).
  - Raters, reviewers and employees routinely have multiple conversations over the year; make them meaningful.
- Before writing the EER, determine what you would do with this employee if you had the sole decision; do not solely consider past performance. Ask yourself, is the employee truly equipped and ready for greater responsibilities, and does he or she merit that outcome?
- Build the case for whatever is your decision.
- Don't surprise the employee.

FOR EMPLOYEES

- Read five years of EERs in 15 minutes; write down in three sentences what you got out of them. Consider what impressed you about your own performance that shows readiness for more responsibilities.
- Write to the board; it makes the decision, not the rater or reviewer.
  - Be self-aware: highlight challenges and significant accomplishments; do not self-assess.
  - Be smart: strong verbs beat adverbs and adjectives; boards want to see content (subject, verb, outcome, why it matters) and professional development over time.
  - Be focused: back-and-forth negotiations over adjectives, tasks, activities take time but don't improve weak content.
  - Avoid clichés and worn, hackneyed language.
- Think of the developmental area as where you can show growth; avoid serial repetition of the same area.
  - Own your progress and ability to adapt and get stronger over time by addressing them in the next EER.
- Think forward: consider your professional development arc, progressively enhancing strengths, not just your career path and speed of promotion. What did you learn and apply over the past year, or three or five years that enhances your future capacity … and hence your promotion competitiveness?
- Think collaboratively: what did you do that helped others get better and achieve results that matter?

—Alex Karagiannis

Some misperceptions about EERs persist. One holds that promotions are more a matter of chance than merit.

that better fit with both the department's leadership and management principles and GTM's promotional criteria. And GTM revamped the Career Development Program into the Professional Development Program to put the emphasis on professional growth (not career arcs) and strength (not speed) for advancement, and to simplify assignment distribution requirements and eliminate overcomplicated majors and minors.

The program for granting Meritorious Service Increases was revamped by GTM and AFSA in 2016, in the form of a three-year pilot program [see p. 37 for more on this]. Separately, the bureau and AFSA had had a contentious period with institutional grievances and appeals on the 2013, 2014, 2015 and 2016 MSI award results. The department did not pay the MSI awards in 2013 and only awarded MSIs to 5 percent of those who had been recommended for promotion but did not achieve it in 2014, 2015 and 2016. This led AFSA to file grievances; the association won the first (2013), lost the second (2014) and awaits final decisions on the last two (2015 and 2016). Meanwhile, the department launched the three-year pilot.

In the MSI pilot for 2019, GTM did not include employee names in an attempt to mitigate implicit bias on the part of panel members. The results did not show a statistically significant difference, but rather a slight decrease, in the number of women and minorities getting awards. The reason is rather straightforward—it was a mechanical solution to a cultural problem. Private-sector human resources experts have noted what they call the "idiosyncratic rater bias effect." Since MSI nominators know the employees, any implicit bias is more likely at that stage (including whether to nominate at all) than it is later from a panel that is deliberately composed of individuals representing diversity.

The answer to implicit bias is to address it head-on and change attitudes and behaviors. Unlike other fields (e.g., music auditions, where technical skill and virtuosity are key factors and evaluators are well served by not seeing the candidates), nominators for awards and raters and reviewers for EERs know the person. In EERs, employees write the initial section and frame the report that selection boards read. Despite the best intentions, eliminating names does not fundamentally address bias, according to extensive peer-reviewed and validated analyses. Only a concerted effort to help all employees get better—positive bias—will mitigate negative bias at the front end. Other than insisting on diversity in judges, trying to tackle bias at the back end will have limited, if any, impact.

Other aspects of the reforms also have a mixed record. For instance, after an initial flurry of interest by employees in the new EER-related resource bank, its use tailed off. GTM is looking to make the resource bank more prominent and easily accessible because it offers guides and advice, including on such things as avoiding coded and loaded language and hidden biases.

Misperceptions about EERs

Some misperceptions about EERs persist. One holds that promotions are more a matter of chance than merit, using a coin toss, dice roll, crap shoot or roulette spin as metaphors. This misses the point. An individual EER is a one-year snapshot. Selection boards have a dynamic view: cumulative (three or more years of reviews); comparative (each individual's development arc); and competitive (performance and future projection assessed in the context of the full cohort). It is not speed, but strength of development across assignments—challenges and accomplishments—that counts heavily in determining readiness for greater responsibilities.

Another misperception is that writing is the single critical factor. Naturally, clear, concise, crisp, vivid writing is better than flabby, verbose, pedestrian, flat writing. But writing is a, not *the*, determining factor for boards. Content matters more than prose. Making a business case goes further than a good story—the latter is interesting to read, but not the most consequential component for decision-making.

A third is the notion that the "development area" is a mark of near death. What's important here is not to have a repetitive pattern. Throw-away lines do not impress boards; they degrade the overall integrity of the report. Boards also see through them: No matter how characterized or disguised, weaknesses in interpersonal relations come through. It is natural for strength in all competencies to grow over time, but leadership and relational growth must improve faster and more consequentially to make one competitive for promotion. As employees handle more complex internal and external policy challenges, the human factor becomes ever more important. Progressing from responsibility for oneself, to teams, to an enterprise level entails exponential growth in leadership to inspire people and foster the next generation. Lack of self-awareness, emotional intelligence and people skills comes through in EERs.

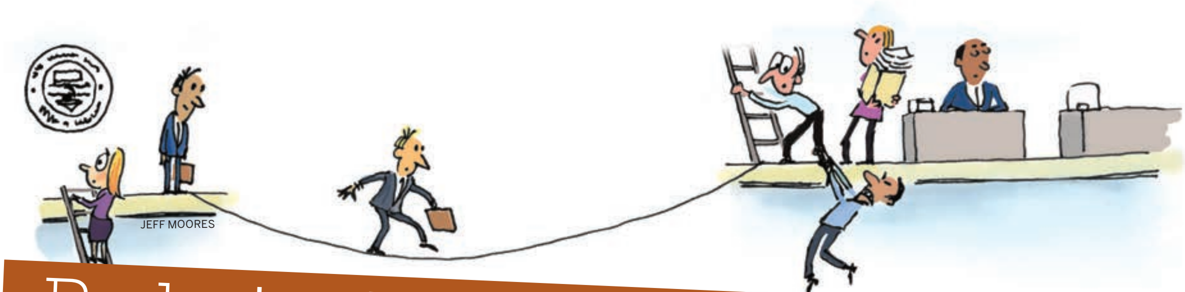
None of this is to suggest that there are no false positives and false negatives when it comes to promotions. But the system is designed to mitigate against it. More important, their occurrence suggests that more reform is essential. Such reform should draw from employee and AFSA input, in addition to reviewing results and mining best practices from both public and private-sector initiatives, to create a new architecture and new user-friendly software interface.

The Road Ahead

During 2017 performance management reform received comparatively less attention as the department grappled with the hiring freeze, the Redesign (later rebranded The Impact Initiative, or TII) and the President's Management Agenda and associated Office of Management and Budget reporting requirements. Even as GTM concentrated on workforce hiring and attrition issues, the sizable outflow of Senior Foreign Service personnel meant losses in both national security and foreign policy experience, as well as leadership—including in inspiring employees and programmatic management, further deflecting attention from performance evaluation.

In 2019 the State Department listed "Talent" as the first category of its top five management priorities. As noted earlier, performance management improvements are highlighted as an objective, though regrettably the format of the management statement did not include a specific, targeted, timebound goal. As with any change, for performance management reform to be a success, robust, ongoing communications with, by and for employees will be essential as the department moves to design and implement a new performance management architecture and EER form and processes. It can build incrementally on the 2015 reforms (go small) or adopt a more radical approach (go big, and join the ranks of cutting-edge enterprises); both have benefits and risks.

It remains to be seen what lessons the department draws, what resources it devotes, what benchmarks it sets, and what timelines it develops for implementation.



Redesigning Foreign Service Performance & Promotion at USAID

USAID took the first bold step to modernize its performance management and promotion systems in 2014, asking FSOs to report honestly and in detail what they thought of these processes.

BY MARTHA LAPPIN

In 2014 USAID took the first bold step on a journey to modernize its performance management practices and increase the transparency and fairness of its promotion process. The Office of Human Capital and Talent Management asked Foreign Service officers to tell us honestly, and in great detail, what they *really* thought of the agency's performance management and promotion processes (USAID FSOs number 1,850, compared to 7,905 at State). The results, published in 2015 in "Current State Report: Evaluation of the USAID Foreign Service Performance Management Program," were not a surprise; they reflected the complaints, frustrations and growing cynicism about processes FSOs had been sharing with each other and their leadership for years.

What *was* new, and also exciting, was the agency's commitment to do something about it. All we knew at the time was that Band-Aids and quick fixes wouldn't suffice, and that FSOs themselves would have to play a leading role in overhauling an outdated and inefficient system.

Here are the changes USAID has implemented to date, as well as some of the lessons learned in the process.

Identifying the Problem

Federal mandates established by the Foreign Service Act of 1980 provide the foundation for FSO performance management

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and promotion policies. Advancement in the Foreign Service relies on a rank-in-person, competitive promotion system, supported by a traditional approach to planning, monitoring and evaluating performance. For decades, the cornerstone of both the performance management and promotion processes at USAID was the Annual Evaluation Form. The AEF served as both the annual performance evaluation, documenting how well the individual has done over the past year, and the primary input to the boards charged with recommending candidates for promotion. In theory, this might seem like an efficient way to "kill two birds with one stone"—however, in practice, the AEF served neither purpose well and consumed an inordinate amount of time every spring.

What we suspected, and our assessment confirmed, was that candid conversations about professional development were few and far between (and met with considerable resistance if they suggested that an employee's performance wasn't up to par in a particular area), and that the AEF had largely devolved into an exercise in artful writing designed to impress the promotion boards.

These and other findings reflect the fundamental problem with trying to use a single document for two very different purposes. AEFs tended to focus on the employee's most noteworthy achievements and were often exaggerated and laden with superlatives that obscured true differences across employees' skills and readiness for promotion. Moreover, it was never clear whose opinion the AEF reflected—although "officially" written from the supervisor's perspective, employees often wrote the first (and sometimes final!) draft of their own AEF. And 360-degree feedback solicited at the end of the year was often reduced to quotes used to support supervisors' glowing narratives.

The norms that evolved around AEFs over many years contributed to FSOs' loss of confidence in the process, but that was not the only casualty. The single-minded focus on AEF writing every spring also undermined what should have been the primary goal of the performance management system—namely, helping FSOs develop and enhance the many complex skills they need to be successful as they move up the career ladder. When performance management is viewed as synonymous with writing AEFs, things like thoughtful conversations about performance, honest feedback about strengths and weaknesses, and deliberate efforts to create developmental assignments tend to take a back seat.

This doesn't mean that most supervisors didn't care about developing their staff. Many supervisors tried to maintain a focus on employee development, including holding employees accountable for poor performance, but our human resources systems provided little support for their efforts. With too few people and too much work to do, it was just too easy for meaningful conversations between employees and supervisors to get sidelined or postponed indefinitely.

The Annual Evaluation Form had largely devolved into an exercise in artful writing designed to impress the promotion boards.

Putting Employee Development into Performance Management

As HCTM made a commitment to acknowledge, understand and address these challenges, we were extremely fortunate to have the full support of USAID's senior leadership—including our administrator, our partners at AFSA and, most important of all, our hardworking 18-member community of stakeholders (CoS). Beginning in April 2016, the CoS that led the redesign consisted of FSOs from the FS-3 to Senior Foreign Service grades. The group was co-chaired by the USAID counselor, the highest career FSO at the agency, and an FS-3 officer. The role of the junior officers was particularly important because we sought to build to the future.

The goals of the redesign were:

- Facilitate ongoing, meaningful feedback and professional development to build employees' expertise throughout their careers.
- Ensure that processes for dealing with employee misconduct and chronic poor performance are clear, fair and effective.
- Increase the transparency, objectivity and fairness of the promotion process.
- Reduce complexity and administrative burden, wherever possible.

HCTM supported the stakeholder community by providing input from the latest research and standards of practice in both the public and private sectors, and by facilitating the many working groups that discussed, debated and, ultimately, designed the framework for the interrelated elements of the new processes. Forms, instructions and operational details were developed and refined through focus groups, field tests, negotia-

The Six Promotion Decision Factors

COURTESY OF MARTHA LAPPIN

tions with AFSA and a three-day promotion process pilot test. This collaborative, data-driven approach produced systems that are practical as well as innovative.

The first task the stakeholder group tackled was to integrate the FS Skills Matrix and the SFS Skills Model into what is now our FS/SFS Skills Framework. The differences across the FS and SFS core skills and subskills suggested that, suddenly, as one entered the SFS different skills were required, when in fact what our working group determined was that skills required for success are the same; what changes is the expected level of proficiency and the sphere of influence and context in which the critical skills are demonstrated.

The FS/SFS Framework now provides a solid foundation for both performance management and promotion processes across an individual's career at USAID. In addition, the behavioral examples developed to illustrate how expected proficiency levels in the four core skills change as FSOs progress in their careers help both supervisors and promotion boards anchor their expectations.

Next, stakeholders charted a vision for what our performance management system should look and feel like. We named the new system "Employee Performance and Development," leaving no doubt that developing our people was the primary objective. The actual requirements of the system are minimal, yet the redesign represents a major shift in our culture—from a focus on end-of-year documentation to year-round conversations. Here are the new requirements:

- Quarterly conversations between supervisor and employees.
- Skill development objectives, along with performance/task expectations, for every FSO.
- A skills assessment review and discussion conducted by supervisors at the end of every performance appraisal cycle.
- A satisfactory/unsatisfactory end-of-year evaluation, with no written narrative.
- An Annual Accomplishment Record consisting of five entries of 75 words (or fewer) where employees summarize their contributions to the team or mission and then supervisors review, suggest revisions if appropriate and sign.
- Counseling and Performance Improvement Plans for underperformers.

Training and guidebooks highlight the importance of honest two-way conversations about progress, performance and priorities. They emphasize supervisors' responsibility to employees' advancement by developing their own coaching, feedback and communication skills. And they underline the need for supervisors to seek and share timely, relevant and development-oriented 360-degree feedback on the people they supervise throughout the year.

All of these changes were rolled out and communicated to the USAID workforce in 2018 and 2019, along with the promise that every element of the new process would be evaluated—and refined—in the coming years based on employee feedback. The Year One Evaluation was comprehensive, including promotion board member interviews and surveys, as well as an October 2019 Workforce Survey completed by more than 500 FSOs (representing nearly one-third of the FS USAID workforce).

We have learned that we are clearly on the right track, but still have work to do. The good news is that two-thirds of our respondents reported having had both required quarterly conversations in the first two quarters of the appraisal cycle. Given all the summer assignment transitions, these are pretty good numbers; however, there is room for improvement in how quarterly conversations are used.

Only half of all FSO respondents felt that their supervisor had "used quarterly conversations effectively to clarify expectations and priorities"; and only half said they had established a skill development objective with their supervisor. This year, HCTM and senior leaders need to do a better job communicating the value of skill development objectives. These objectives not only keep attention focused on specific developmental goals; they also create relatively nonthreatening opportunities to practice the art of asking for, giving and acting on constructive feedback. Nevertheless, it is encouraging that fully 85 percent of our respondents agreed that quarterly conversations were a good investment of time for employees and supervisors.

Promotions

The changes to the promotion system were even more dramatic than the changes to our performance management processes. In rethinking what boards need to see to make wise promotion recommendations, the stakeholders group recognized that boards need more than just one perspective (the supervisor's), and they need input that would more clearly differentiate FSOs. After much discussion and debate, the group determined that promotion boards would need three different documents to reliably assess the best candidates for promotion:

- The Annual Accomplishment Record (completed by all FSOs as part of the Employee Performance and Development process).
- A Promotion Input Form, consisting of five 250-word blocks employees complete and one 250-word block supervisors complete to help boards assess candidates on the six promotion decision factors [see the graphic, opposite page].
- Multisource Ratings (MSRs) of behaviors that reflect the four core skills, collected from supervisors, colleagues and subordinates.

The Annual Accomplishment Record is designed to provide a fairly objective account of the employee's significant contributions and accomplishments over the course of the appraisal period. It is written by the employee with input from the supervisor, who also has to sign off on its accuracy. The new Promotion Input Form asks employees to describe how they have demonstrated each of the four core skills (these are four of the six promotion decision factors), and to also show their understanding of and ability to advance the agency's mission.

Supervisors have just one block to complete, and this is where they can recommend or not recommend someone for promotion, and share what they believe the promotion board needs to know to accurately assess the employee on the six promotion decision factors.

Multisource Ratings: How They Work

The promotion process also involves collecting data from multiple sources on the extent to which promotion-eligible FSOs are displaying specific behaviors related to the four core skills. This information is collected via short surveys where respondents use a five-point scale to rate the extent the FSO does things like "seeks information from relevant sources to develop and implement appropriate solutions when problems arise" and "communicates effectively and respectfully with people at all levels of USG and host country." These Multisource Ratings are completed by the FSO's immediate supervisor and all direct reports, if they have any. Ratings are also collected from a carefully selected group of colleagues.

Supervisors are instructed to meet with their promotion-eligible FSOs to review the clearly defined criteria for peer/other raters and identify which colleagues in the pool of potential raters best meet the criteria. The goal is to only include individuals who have a strong working relationship with the FSO and thus are in a position to have observed most of the behaviors they are asked to rate. The peer/other and subordinate ratings are aggregated across the individuals in those groups, and averages are only shared with FSOs if there are at least three respondents in the group. This is to preserve the confidentiality of the peer/other and subordinate ratings—one of the most critical elements of the process. Supervisor ratings are not confidential.

We named the new system "Employee Performance and Development," leaving no doubt that developing our people was the primary objective.

Summaries of the MSRs are provided to promotion candidates to support their professional development, as well as to the promotion boards.

Of the three new components of the promotion package, the Multisource Ratings are the most controversial. The anxiety and confusion over them are reflected in the fact that when asked if including the ratings in the promotion process would help boards better assess candidates' core skills, more than 40 percent of the October survey respondents said no. The survey also revealed some possible reasons for this skepticism. For example, average ratings, particularly from supervisors, were very high; and most FSOs did not believe the five-point scale was adequate to differentiate candidates. We also noted that too many supervisors (approximately 15 percent) failed to follow the rater selection process and guidance, and that the large number of peer raters we allowed (up to 15) encouraged including raters who did not truly meet the selection criteria.

The Office of Human Capital and Talent Management is addressing each of these issues. For example, we are using item analyses to identify those that are "too easy" and fail to adequately differentiate FSOs. We are also modifying the rating scale anchors and reducing the maximum number of peer and subordinate raters from 15 to 10. The other major focus for 2020 is communication. Only 60 percent of our FSO respondents said their supervisor encouraged the team to participate in the MSR process, and only 50 percent said their supervisor reinforced the need for honesty, confidentiality and integrity in the MSR process. As we develop better training, and as supervisors and managers get more comfortable with the rating process, we expect confidence in the MSRs to increase, as well.

Overall, we were very encouraged to learn that nearly all promotion board members endorsed the value of the new promotion package. And while many FSOs are adopting a wait-and-see attitude about MSRs and the overall impact of the new process, a large majority see it as an improvement over the old evaluation forms.

A Step Forward

In summary, the innovations USAID implemented in 2018 and 2019 represent a huge step forward in the agency's effort to enhance the skills and professional development of the workforce while simultaneously providing promotion boards with the information and structure they need to identify the best candidates for promotion. There appears to be widespread acceptance of the Employee Performance and Development process, although we need to continue to encourage and support supervisors to use the required quarterly conversations more effectively. To that end, we have provided extensive education and training opportunities for the new process, and have been delivering a course on critical conversations.

With respect to the new promotion process, acceptance may take a little longer. Understanding the new process requires unlearning the deeply embedded norms and practices of the AEF system, and this takes time. It also requires the Office of Human Capital and Talent Management to continue to work on training and communication, in addition to paying close attention to the one-off situations, technology issues, and equity and fairness concerns our workforce is sharing with the office and with AFSA.

Fortunately, our workforce is a partner in this great endeavor, and with their continued good faith efforts to make it work—and to provide honest feedback when things aren't working—our personnel systems will only get better. We are already looking forward to hearing what FSOs will tell us in the Year Two Evaluation.

State's New MSI Program Preliminary Results Are In

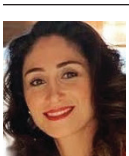
Creating an MSI award process that is transparent, efficient and true to the intent of the Foreign Service Act of 1980 is a shared goal of AFSA and the State Department.

BY RAEKA SAFAI

Beginning in 2015, the State Department undertook to update and streamline its employee evaluation system. As part of that effort, the department proposed a process for awarding Meritorious Service Increases that was removed from the EER/selection board procedure. In 2017, after weeks of negotiation, the department and AFSA agreed, to establish MSIs in a separate awards program, albeit as a three-year pilot, for 2017 through 2019 MSIs.

The MSI pilot program is completely nomination-based, with awardees identified by two dedicated MSI panels: a generalist panel and a specialist panel. The awards are apportioned in line with the approximate ratio within the department of both generalists and specialists (i.e., 60 percent and 40 percent, respectively). The pilot program also expanded the awardee pool beyond those employees who are eligible for a promotion and, in 2019, introduced the requirement of gender-neutral nominations.

In November 2019, AFSA sought feedback from our members on the program. Here we share some background on the MSI program and its evolution, along with a detailed report on the survey findings on the pilot.



Raeka Safai, Esq., is the deputy general counsel for the American Foreign Service Association. She provides legal and policy guidance to elected AFSA officials and members on a full range of labor-management and employment related matters.

The MSI Pilot: What Survey Respondents Said

Here is a sampling of the free-form comments on the MSI pilot program from AFSA members who participated in the November 2019 survey.

The Issue of Administrative Burden

"The administrative burden on supervisors with EERs, regular post awards, and then MSIs is too much."

"Nomination-based systems require employees to have supportive managers willing to go above and beyond the EER process—extra work. … Managers and supervisors are often unwilling to do extra paperwork for things such as awards and MSIs."

"This is better, but it still comes down to initiative on the part of supervisors, which is hit or miss."

The Issue of Timing

"MSIs suffer a lack of nominations in part because it's yet another form to fill out and also because they are seen as risky to both nominee and drafter. If MSI is not received, Great Employee may get nothing; missed both the board's blessing and then too late for the post's award committee process for the work done that year."

"MSI nominations are difficult because the employee could qualify for different types of awards. The MSI nomination specifically says it cannot be for the same performance that a Meritorious Honor Award or Superior Honor Award was awarded.

"Thus, it is possible that employee would have superior performance and be nominated for an MSI, but not approved for that award and then also not get a MHA or SHA because the performance is substantially in the past or the employee or supervisors have changed posts, or an awards budget has been exhausted due to the MSI processing time.

"MSIs should be harmonized with MHAs and SHAs so that the employees with very high performance do not miss recognition."

Transparency and Fairness

"I believe that the trial system that was used is the most transparent and fair system that State Department has rolled out."

"I appreciate the attempt to give specialists MSIs because they are overlooked, and the promotion rates are abysmal."

"I prefer the nomination not to be linked to being recommended for promotion. Having a separate process allows the panel to concentrate on the specific work being nominated. … Promotion is supposed to be based on potential to serve at a higher rank, while the MSI is about work already accomplished. Linking the two can blur that focus."

Gender-Neutral Language

"I love the flexibility of the pilot, and I also love the gender-neutral-language feature. I think having the freedom to recognize outstanding work by any colleague at any time is excellent practice. I also think removing gender bias is critical to ensure equal representation in selection from submissions."

"Gender-blind review is really important. Glad this was piloted in the MSI, but really it needs to happen for EERs too."

The Issue of Organizational Culture

"Generally speaking, I think that the pilot is a wonderful program. I just fear that State lacks an organizational culture where managers seek to understand (and act on) all the avenues available to them to reward their people. MSIs are a nice, creative path to recognize someone, but are underutilized, as evidenced by the statistics that HR shared."

Why Change the MSIs?

A number of factors led the State Department and AFSA to review the MSI award process. Since the start of the MSI program several decades ago, MSIs had been mainly tied to the promotion process in a manner that operated relatively routinely. Until 2013, an agreed-on proportion (5 to 10 percent) of those who were recommended for promotion but fell short of achieving it automatically received MSIs, and bureaus had an additional relatively small number of awards to distribute on a discretionary basis.

Because of the October 2013 government shutdown, however, the State Department awarded no MSIs at all that year, which prompted AFSA to file an implementation dispute. In 2014 the department resumed the award of MSIs but cut the percentage down to 5 percent of those recommended but unable to achieve promotion and held it there through 2016. AFSA filed implementation disputes for each of those years. AFSA won the 2013 suit, and employees received "back" MSIs, with interest. While AFSA prevailed before the Foreign Service Grievance Board in the 2014 dispute, the Foreign Service Labor Relations Board overturned that decision. The Grievance Board ruled that it was bound by this decision in the 2015 and 2016 consolidated disputes. AFSA appealed that ruling to the FSLRB and is awaiting a decision.

While awarding MSIs automatically out of the promotion process may seem efficient, it has become apparent that assessing an employee to determine their potential to perform at the next highest level is not the same as assessing an employee's past performance to identify especially meritorious service. Specifically, selection boards use the Decision Criteria for Tenure and Promotions to assess the *potential of each employee to perform at the next highest level*—i.e., for promotion. At the same time, however, Section 406(b) of the Foreign Service Act of 1980 mandates the Secretary to grant, "*on the basis of especially meritorious service* [italics added], to any member of the Service … an additional salary increase to any higher step in the salary class in which the member is serving"—i.e., the MSI. The criteria for promotion and the criteria for an MSI are distinctly different.

The criteria for promotion and the criteria for an MSI are distinctly different.

There were additional considerations. First, because MSI recipients had to have been recommended for promotion, significant groups of employees were excluded from consideration even if they had displayed meritorious service (e.g., employees not eligible for promotion in that year and smaller cohorts, such as office management specialists, with limited promotion opportunities). Second, combining the MSI awards and promotion bogged down the selection boards, which meant that it took an inordinate amount of time to release promotion results. Third, as a subsidiary of the promotion process, MSI awards did not get the consideration that would ordinarily be required for citations of exceptional and important service.

Unlike the old MSI process, the new program is purely nomination-based. A one-page nomination form can be filled out by anyone and only requires the approval of an official in the nominee's chain of command. The pool of potential awardees has been expanded by defining eligibility as follows: (1) career members of the FS in grades 1 to 7, (2) generalist career candidates recommended for tenure prior to the MSI nomination deadline, and (3) specialist career candidates who are eligible for competitive promotion.

Nominations are considered and awards granted by special MSI panels that are created in the same way as selection boards, by the Performance Evaluation division of the Bureau of Global Talent Management. The appropriate MSI Panel (i.e., specialist or generalist) reviews the nominations and rank orders those nominees who have met or exceeded the criteria set out in the MSI Procedural Precepts, which establish the scope, organization and responsibility of the panels.

Gauging the Response

To gauge the response to the pilot program, AFSA Director of Professional Policy Issues Julie Nutter conducted a member survey in November. At the time, we shared basic data on the pilot's operation. Such data include the fact that during each of the three years, more than 810 nomination slots had been allotted to bureaus. Unfortunately, on average, the total number of nominations received by the bureaus was only 60 percent of the total slots available. In other words, 40 percent of MSI award opportunities were not utilized. Of those nominated, an average of 77 percent received MSI awards.

We are pleased to report that 822 members participated in the AFSA survey, and 418 respondents provided us with additional comments. We thank those who participated; your responses and comments are invaluable as we look to the future of the MSI award process. [See p. 38 for a selection of additional comments from survey respondents.]

Approximately 70 percent of participants identified themselves as generalists. A plurality (45 percent) has been in the Foreign Service for more than 15 years; the second-largest category (26 percent) has been in the Foreign Service for 11 to 15 years. Among respondents, 45 percent had received MSIs prior to the 2017 pilot program; just 16 percent had received them under the pilot.

Although 61 percent of the respondents believed they received adequate information and guidance on the pilot program, it is a shared goal of AFSA and the department to increase messaging and guidance on the MSI program going forward.

To better understand how engaged our participants were in the new MSI program, AFSA asked whether respondents had been nominated for an MSI under the pilot: 23 percent said they had, while 77 percent had not. We also asked whether participants had nominated anyone for an MSI under the pilot program: 25 percent had nominated someone, while 75 percent had not.

The survey then asked whether respondents preferred an MSI program that was: (1) nomination-based and open to all; (2) tied to recommendations for promotion; or (3) other. Significantly, more than half of participants (53 percent) chose option 2, MSIs tied to recommendations for promotion. About a third (30 percent) voted for a nomination-based system; and 17 percent chose "other." Based on the comments we received, the consensus for "other" appeared to be a hybrid system incorporating options 1 and 2.

The survey results and comments also revealed that the majority of those who preferred an MSI system tied to recommendations for promotion (like the old system) found a nomination-based process (like the pilot program) too burdensome. The concern raised most often was that, while anyone can nominate an individual for an MSI, supervisors did not, or were not, taking the time to nominate their employees.

AFSA also received several comments noting that the delay in receiving MSI award results under the new system—as opposed to a Meritorious or Superior Honor Award—made the MSI a "riskier" option.

Future of the Pilot Program

The shared goal of AFSA and the department is to create an MSI award process that is transparent, efficient and true to the intent of the Foreign Service Act of 1980. In an effort to reach this goal, the parties have agreed to continue the MSI pilot program with gender-neutral nominations for an additional year to allow time to review and improve the award process based on observations and data collected by the department, as well as the survey results and comments received from our members.

We invite any members who wish to share their views and comments with us to do so via email to afsa@state.gov with the subject line "MSI Pilot Program." Emails sent to this address will go directly to AFSA's Labor Management office. For additional information on the MSI Pilot Program, please see State VP Tom Yazdgerdi's column in this month's AFSA News.

What's Next for SNEA?

JEFF MOORES

The special needs education allowance program had become almost impossible to navigate. Will the new SNEA policy make a difference?

BY DONNA SCARAMASTRA GORMAN

You don't really think about most allowances until you need them. Still, problems with the special needs education allowance (SNEA) have been bubbling up for several years now, as Foreign Service parents of special needs children fought with the Bureau of Medical Services (MED) and with the broader State Department for support and recognition of the issues they face as they try to bid on, get to, and survive at overseas posts.

In response to the pressure, the State Department decided in 2017 to review the matter. The department's SNEA task force included representatives from MED, human resources, AFSA and the Foreign Service Families with Disabilities Alliance, a group of FS members that advocates on behalf of families with special needs children.

In December 2019 the task force completed its work, and the department presented a revamped SNEA policy that was outlined in the newest section of the Foreign Affairs Manual, 3 FAM 3280, and accompanying changes to the Department of State Standardized Regulations.

But are these changes making a difference?

A Brief History

Over the past few years, the problems FS families have been encountering with SNEA have been covered extensively in *The Foreign Service Journal*, with both parents and department officials weighing in. From there, the issue moved into the wider world, with outlets such as *The Washington Post* and

Donna Scaramastra Gorman's articles have appeared in Time *magazine,* Newsweek, The Washington Post *and the* Christian Science Monitor. *A Foreign Service spouse, she has lived in Amman, Moscow, Yerevan, Almaty, Beijing and northern Virginia. Formerly an associate editor for the* Journal, *she is currently posted in Moscow with her husband and children. She would like to thank the numerous parents and others in the department who shared their views on SNEA, none of whom wished to be named in print. Senior management in the Bureau of Medical Services did not respond to requests for information.*

As it got down to work, the task force uncovered multiple problems, including issues with communication, financial management and coordination among SNEA stakeholders.

Foreign Policy covering State's seemingly callous approach to FS families in need.

In 2017 *Washington Post* reporter Jackie Spinner wrote that the department was "quietly withdrawing financial support for diplomat families of children with special needs, effectively forcing some parents to serve overseas without their children or ultimately leave the Foreign Service." Spinner noted that there was no formal change in policy when, without warning, MED began slapping class 5 clearances on special needs children, which prevented them from going overseas with their families and forced some parents to pay thousands of dollars out of pocket to find appropriate schooling for their children.

Foreign Policy jumped on the story next. In April 2018, Robbie Gramer reported that starting in 2015, "the medical office has been arbitrarily cutting funding for children with autism, attention deficit hyperactivity disorder (ADHD), or other special needs or mental health issues. It has also revoked the medical clearances for some children that are required for foreign posting, forcing some diplomats out of their jobs because of their children's special needs."

After a group of Foreign Service members representing some 1,400 families sent Secretary of State Mike Pompeo a letter in 2018, saying the department had slashed benefit options and funding for children with special needs, *FP* again covered the topic, quoting from the letter. (The Secretary himself chose not to answer the letter.) Heather Nauert, State Department spokesperson at the time, said in a statement to *FP* that department leadership "continues to work toward a solution."

MED's own practitioners also jumped into the fray. When parent Kathi Silva wrote about the "disconnect between MED and the families" in the March 2018 issue of *The Foreign Service Journal*, Dr. Charles Rosenfarb, then the medical director of the Bureau of Medical Services, responded with a vague promise that MED would "continue to advocate very strongly on behalf of all FS children."

Child psychologist James Brush later wrote in the *FSJ* that during his time at State, he "found that many MED psychiatrists, some members of the Office of Overseas Schools and some within the Family Liaison Office were prepared to torpedo the [Child and Family Program] from the start."

As it got down to work, the task force uncovered multiple problems, including issues with communication, financial management and coordination among SNEA stakeholders. In addition, the task force determined that MED was not only understaffed, but also not well staffed for addressing problems with SNEA. The hiring freeze of 2017 depleted MED's staff as employees left the department and were not replaced. Parents argued that some of those who remained at MED either didn't understand or were downright hostile to the program, working behind the scenes to dismantle it.

And then there was the problem with the professionals in charge of administering the program. Parents, and even many of the department's own medical professionals, have long argued that State needs to hire educational experts, not medical doctors (RMOs) or psychiatrists (RMO/Ps), to help determine what remedies might best serve special needs children posted overseas.

The Solution(s)

Heather Townsend, a retired FSO and senior grievance counselor who has spent the past few years working on behalf of AFSA's clients to resolve problems with SNEA, says AFSA is pleased with the changes as outlined in 3 FAM 3280. The allowance is now clearly spelled out, she says, which "should provide for greater consistency of administration and less individualized interpretation by the approving authority."

For the first time, she notes, the FAM articulates a formal philosophy "that is clearly supportive of families of children with special educational needs." The FAM asserts that "by assisting employees with the fulfillment of the educational needs of their children, SNEA encourages employees who have children with special educational needs to bid on and serve in foreign assignments." It also promises that the department will authorize SNEA "as flexibly as possible" because it is "in the department's interest to maximize employees' ability to serve in foreign assignments."

Changes have also been made to the allowance for boarding school. DSSR 276.22 was amended to permit employees to apply for the away-from-post educational allowance for a child who would normally reside at post while not attending school if the child's medical clearance allowed it. Parents and educational consultants, however, are still unclear as to how these changes will affect individual cases.

One parent says she has spent more than $50,000 out of pocket to pay for her child's therapeutic boarding school because the cost of such a school exceeds the normal away-from-post allowance. She was afraid to request financial help for the school, she says, because she knows of families who were forced to curtail when MED determined that their educational challenges couldn't be met at post. She has written to MED several times since the December 2019 cable came out, but says she has yet to receive a reply as to whether the policy changes apply to her family.

Other important changes to SNEA include clarification that it applies not only to children who would be covered in the United States by the Individuals with Disabilities Education Act, but also to those covered under Section 504 of the Rehabilitation Act. Speech therapy and language therapy will now be covered by SNEA even when provided outside the school setting or normal school hours.

Further, extended school year services may be reimbursable even when they are provided in noneducational settings, as long as those settings offer the services specified in the child's individual learning plan (ILP). Another change is one that parents have long wanted: In some circumstances, the services of an instructional aide hired directly by the parents are now reimbursable.

The New SNEA

There has never been an appeals process available to parents. The department is reportedly at work, however, on a new 16 FAM section that will lay out a SNEA appeals mechanism. Townsend says AFSA is still waiting to see and comment on 16 FAM. AFSA is also expecting to comment on the new centralized vouchering mechanism that the department is developing. The department anticipates that a central system for processing payments will remove the discrepancies that parents currently face as they work with different financial management officers from post to post, all of whom read the regulations differently. Some parents, though, have expressed concern that this centralized system, once implemented, will continue to delay decisions regarding payments.

Ultimately, Townsend says, AFSA "would like to see the availability of special education resources eliminated as a consideration in the MED clearance process altogether." And,

Last year the State Department initiated a pilot program allowing FSOs to bid on posts even if their family members had not yet been medically cleared.

she says, "SNEA is an educational allowance; we would like to see the department adopt the approach that it trusts parents" to make educational choices on behalf of their own children.

Last year the State Department initiated a pilot program allowing FSOs to bid on posts even if their family members had not yet been medically cleared. A great idea, some parents say—but until MED begins to process clearances in a timely fashion, it isn't much help to parents, because medical clearances still need to be received before paneling. Still, says one parent, if you get an assignment, then you'll have someone at your incoming post advocating on your behalf with MED, because post wants you cleared to serve. Before the pilot program began, bidders were all alone in their battles with MED.

Parents Respond to the Changes

Many parents are withholding judgment at the moment, with most saying they haven't yet seen the promised changes go into effect. But they are hopeful that, given time to increase and expand its staffing, MED will make good on the promises outlined in 3 FAM 3280.

One FSO parent says he applauds the new policies and the effort it took to put them in place. When the initial cable came out, he "hoped things would be different." But sadly, he has not yet seen a change. "Policies are just policies until they are put into action," he says. "While the policy has changed, the people have not; and in our case, we have not seen a positive change. MED is still a dysfunctional office with no accountability."

Several people close to the task force specifically named Steven Walker, formerly a deputy assistant secretary in the Bureau of Human Resources, as the person who deserves thanks for pushing these changes through. (Mr. Walker was unable to comment for this article.) Parents are appreciative of his effort; but still, while progress has been made, says one, there's "a practical side where things aren't where they need to be yet, largely because staffing within the Child and Family program office was decimated, leaving only one person to process all SNEA cables and claims worldwide."

Changes to the policy aren't happening where families can see them, and AFSA's Townsend says this lack of transparency is because the Office of Child and Family Programs (MED/MHS/CFP) has been "critically shorthanded," with just one employee processing all requests, resulting in delays for families seeking SNEA authorization or reimbursement. The good news, she says, is that "MED is making progress now with hiring, and if that stays on track, MHS/CFP will be up to six staff by this summer."

And, for the first time, MED's staff will include a professional with expertise in special needs education, something for which parents have long asked.

What Can You Do?

So what can you do if your family is still stuck in a SNEA nightmare, beyond simply waiting for MED to staff up and enforce its new policy?

For starters, familiarize yourself with 3 FAM 3280 and the revised DSSR. Consider hiring an educational consultant or educational attorney to help you understand what assistance your child is entitled to under U.S. law. If you are an AFSA member, you can contact senior grievance counselor Heather Townsend for help interpreting the new rules. Or join the Foreign Service Families with Disabilities Alliance, whose membership advocates on behalf of families like yours.

Educational counselor Rebecca Grappo, who has helped numerous Foreign Service families navigate these waters, remembers that SNEA used to be a "wonderful" program, one that helped parents and the department work collaboratively rather than causing friction and mistrust between the two groups. Many parents also recall that until a few years ago, the program ran smoothly and helped families develop creative solutions to their children's unique health care and educational needs.

The State Department needs to make this program work again, says Grappo, "because they need to staff embassies all over the world. You want it staffed? Take care of people's kids. This is in the interest of the U.S. government; it's not a perk. You need people, and you have people who will go, and they will serve where you need them—as long as their kids are being taken care of."

Balancing Act's Formula for Driving Institutional Change

A small group of working mothers pioneered putting work-life balance on the agenda at the State Department. Here's their story.

BY LILLIAN WAHL-TUCO

Nine years ago, seven frustrated Civil and Foreign Service women sat around a table in Foggy Bottom to discuss their struggle to balance work and life responsibilities over coffee. One of us who was pregnant said, "There must be a better way. Why do I feel like Eve having Abel at State?"

Lillian Wahl-Tuco joined the Foreign Service in 2006 and currently serves as the public diplomacy desk officer for Ukraine, Moldova and Belarus in the Bureau of European and Eurasian Affairs. Her previous assignments include Paris, Skopje and Sarajevo, and in Washington, D.C., on the Czech desk and on Capitol Hill as a Pearson Fellow on the Senate Foreign Relations Committee. A 2019 recipient of the Swanee Hunt Award for Advancing Women in Foreign Policy, she is a co-founder of Balancing Act and a current board member. She is currently serving on the AFSA Governing Board, which she also served on from 2012 to 2014. Part of a Foreign Service–Civil Service tandem, she is the mother of two children.

Another colleague said, "Why is this balance so hard to strike, and does it have to be?"

All of us were working mothers who shared a passion for our work but were struck by the lack of flexible policies and support for working parents at State compared with other government agencies. We vented about inflexible policies, supervisors and offices; shared challenges in arranging leave for pregnancies or nursing between meetings and language classes; and discussed the lack of institutional focus on modernizing State's policies in these areas. Indeed, the policies, or lack thereof, still seemed to reflect a 1950s organization, not one designed to recruit and retain a diverse 21st-century workforce.

Even worse, when we would raise these issues individually with management or the Bureau of Human Resources (now the Bureau for Global Talent Management), we were mostly dismissed—either told that the Foreign Affairs Manual didn't allow flexibility on an issue or that "there's nothing we can do." Occasionally, a sympathetic boss or HR staffer would share our frustrations, too; but few advised on how to advocate for real change.

Doing nothing was not an option as we watched countless colleagues struggle so much that many ultimately chose to leave the State Department. Nevertheless, we persevered, discovering viable approaches and solutions as we worked to bring about change. Here, presented in terms of lessons learned, is our story.

Lesson 1

Band together. Find allies to collectively advocate.

Given the stonewalling that routinely met individual requests for flexibility, we knew we had to expand our forces. We also felt that there was a gender dynamic at play because many of these issues disproportionately affect women and mothers, though we recognized that men and fathers struggled, too. In addition, many of our single colleagues felt that their work-life priorities were ignored or being sacrificed due to a lack of adequate backup support for parents taking leave. We decided that it would be more difficult for leadership and HR to dismiss a larger group who sought change.

Six months later—in early 2012—we formally launched Balancing Act at State, as an employee organization under the leadership of Amy Coletta Kirshner and Anne Coleman-Honn, and we've never looked back. With more than 1,300 members today and countless advocacy wins for workplace flexibilities, Balancing Act put work-life balance on the map at State. The group was the engine and driving force behind the creation of the voluntary leave bank, the emergency backup-care program, the pregnancy/adoption guide, centralized job shares and numerous FAM changes such as allowing employees to telework on medevac.

But how did we get from seven to 1,300, and how did we get HR to support our ideas and asks?

Lesson 2

Crunch the numbers. Use data to make the business case … and get senior buy-in.

First, as a group we got smart on all FAM and Office of Management and Budget policies related to the human resources issues we struggled with. These included telework, leave, lactation and childcare, among others. Each of us became a subject matter expert (SME) on one of these topics so we could divide and conquer the various problem sets. We built a close relationship with the work-life division in HR's employee relations office; they were supportive of the new energy we brought, yet also skeptical of how much change senior leadership would entertain.

Knowing how our top-down bureaucracy operated, we also agreed that we needed senior leaders to help guide and champion our efforts to get buy-in from the seventh floor. We approached senior leaders we admired and respected, asking them to support our work. We called them senior advocates (SAs), and they became our most trusted mentors and champions of Balancing Act. Early SAs were strategic-thinking, seasoned leaders such as Dana Shell Smith, Pam Quanrud, Rob Goldberg, Ann Ganzer, Marie Yovanovitch, Mark Pekala and Roberta Jacobson who had access to the most senior principals in the department like the under secretary for management (M), the Deputy Secretary (D) and even the Secretary of State (S).

We would secure annual meetings with these top officials, invite them to the federal Work-Life Month events each October in tandem with HR and lobby them for smart policy changes. We knew we were gaining traction when the bureau used the white papers we drafted on our recommendations in their own internal papers. But as we researched the issues, we quickly uncovered a bigger problem at State: There was a significant lack of data or none available on, for instance, the number of employees who asked to telework, or who took leave after the birth of a child (and how much leave) or who quit over work-life issues.

So when we struggled finding this information, we began collecting our own data in membership surveys we designed that became a critical annual endeavor for Balancing Act. We then analyzed the data and presented it in membership reports.

Our HR contacts came to rely on this data, too, and requested more information on our proposed solutions as a result. We weaponized the data to make the business case for our asks because we realized that no one was going to agree to the asks for reasons of morale alone. At one meeting with a former M, we showed the data on how much money State loses (more than $1 million dollars a year) by not having an emergency backup-care program in place, as other agencies do, for employees who have a sudden lapse in childcare or eldercare. M said yes on the spot, and every employee now has five days of coverage a year per dependent for emergency backup care. It was a huge early victory for Balancing Act, and we knew that in making the business case for smart solutions we had found a successful formula.

Lesson 3

Be strategic in your asks. Tie them to broader goals.

"There are two things I don't accept as answers: 'It's too hard' and 'It's never been done.'" This is what a former M said to us when we presented the leave bank idea that had originally met stiff resistance to him. Balancing Act agreed. We also felt that much of the bureaucratic inertia that resisted our innovative mindset stemmed from a lack of understanding of the importance of getting workplace flexibilities right. So our BA board members sought the advice of academics in the work-life modernization space.

We contacted academics like Stew Friedman at The Wharton

School who championed the idea that if you offer employees flexible work options, you not only increase productivity, but also help recruit and retain a more diverse pool of employees. This concept intrigued us, and we invited Friedman to State to meet D staff and give a talk at an event during one October National Work and Family Month. The event was a huge hit, and Friedman was able to tie employee productivity and retention to having flexible workplace tools in place like telework, job shares and alternate schedules.

Armed with this new information, we leveraged these points when advocating for a new employee leave bank—an idea from our own board members who learned that other agencies had this incredible tool in place. When we first approached HR, we were told it would be too difficult to implement because of a software issue in the time and attendance system. Luckily, M agreed with us again that this shouldn't be a good reason not to attempt to create a program that would become such a critical tool for employees needing hours covered for a host of medical or personal reasons.

Balancing Act also realized in our advocacy efforts that in many cases there was information "out there" for employees on certain policies, but no one could find it. It was too hard to find on HR websites, or buried in department literature and cables. BA helped to serve an information-sharing role at the grassroots level through our monthly membership emails and meetings, which also helped build the organization and the constituency.

Lesson 4

Keep at it. Rome wasn't built in a day.

It's now nearly a decade since Balancing Act started, and we have learned that change takes time—and change in a bureaucracy this size takes even more time. One appeal to senior leadership is rarely enough. We have learned that if you don't get the response you want right away, keep coming back, and do it collectively, strategically and consistently. For the past few years, Balancing Act has been invited to brief every new A-100 class that comes in. At the "work-life lunch" session, we discuss the programs that are offered for workplace flexibility, and why our new colleagues should embrace having a good work-life balance in an organization that has not traditionally been known to foster such balance.

They, of course, don't know the journey Balancing Act has been on or how long it took for each BA "ask" to be approved (about two years each). But what they will know is a department that has entered the 21st century with a more modern toolbox of workplace flexibilities. They will experience a department that has paid parental leave (another early BA ask that finally came to fruition this year). They will experience a department that allows you to telework while on medevac and allows your spouse or partner to work remotely in a domestic employee teleworking overseas (DETO) arrangement. They will know a department that is trying to change a culture where productivity is measured by the hours at your desk and not what you actually accomplished, or where you arrive at a new post and work the very next day as opposed to having a day or two to arrange your personal life. These are changes that our new Director General, Carol Perez, is championing—changes reflecting the needs of a modern workforce that BA fully supports.

When I look back at all that Balancing Act has accomplished, it gives me an immense sense of pride. The original founding members get together once a year, and we still vent and share stories, but now we also smile, laugh and reminisce at the path we've forged. Anne Coleman-Honn and I like to joke to family and friends that Balancing Act is "our other baby," because we've had a hand in creating it, raising it and watching it grow over the years. And like any good parent, we want to see it continue to thrive and succeed.

As we look ahead, there is still much more to be done. We want to see a one-stop platform with options for supervisors to help fill gaps when an employee is out on extended medical or parental leave. We want more lactation rooms and childcare options. We want more DETO opportunities across all bureaus. And we want travel covered for the birth or adoption of a child for the non–birth parent or partner. We are confident we will get there because at the end of the day, *we* are the State Department, each of us—individually doing our best and collectively working on these goals to change the culture and embrace the future.

Balancing Act

Founding Members
Amy Coletta Kirshner
Anne Coleman-Honn
Lesley Ziman
Lillian Wahl-Tuco
Carol Volk
Margot Carrington
Kristin Dowley

Former and Current Board Members
Asha Beh, current co-chair
Andrea Donnally, current co-chair
Nicole Otallah
Rob Hollister
Brian Gillespie
Isabella Rioja-Scott
Anne Benjaminson
Sharlina Hussain-Morgan
Emily Bruchon
Miriam Murray Awad
Manuel Medrano
Cheryl Harris
Michelle Bernier-Toth
Lillian Wahl-Tuco

For more information or to join Balancing Act, find them on Facebook at "Balancing Act at State and USAID." Email BalancingActExecutiveBoard@state.gov to receive the monthly membership email.

Managing a Foreign Service Career

From the FSJ Archive

Impressions of the "Outside Man" on the Junior Foreign Service Selection Board for 1947

by G.W. Magalhaes, June 1947

The first thing that an "outsider" realizes when he is invited to help out on the selection of Foreign Service officers for promotion is the fact that he personally does not know the officers who he is to rate.

The New Foreign Service: Problems of Placement

by Edward W. Mulcahy, August 1954

The "ready interchangeability of personnel" called for in the Wriston Report can flourish or it can founder on the shoal of placement.

A Public Member Looks at the Selection Boards

by Herbert Bratter, March 1956

If I were a young man starting my career I should have no hesitancy in joining the State Department's foreign service corps.

Are Efficiency Reports Lousy?

by Theodore C. Achilles, July 1957

Anyone who has served on a Selection Board may shudder at the thought of the efficiency reports he himself has written in the past.

Basic Questions on the Writing of Efficiency Reports

by Arthur A. Ageton and Everett K. Melby, December 1960

Certainly some of us have failed to accept and exercise our responsibility with regard to efficiency reports.

The Foreign Service Assignment Process

by John Ordway, June 1963

The average Foreign Service officer has a very hazy idea about how the assignment process works.

On the Education of Diplomats—A Commentary

by Paul M. Kattenburg, April 1971

We can start by observing that attorneys become such upon completing law school, doctors upon completing medical school, and so on and so forth. But diplomats do not as a general rule prepare in "diplomacy."

Talking to Mr. Syplogoo

by Michael A.G. Michaud, September 1986

You will look at bids, staffing patterns, check position numbers, personnel audit reports, negotiate with colleagues, and take heat from bureau directors.

Who Is the "Total Candidate?" FSO Hiring Today

by Shawn Dorman, June 2008

By government standards, the changes to the Foreign Service generalist entry process have been made at warp speed.

EERs: The Forgotten Front in the War for Talent

by Jonathan Fritz, June 2009

The Employee Evaluation Reports we spend so much time writing every year fail to give promotion panels a useful means for comparing officers to their peers.

Overhauling the EER Process

by Tyler Sparks, September 2012

Now that another Employee Evaluation Review season has mercifully come to a close, it seems clearer than ever that our personnel evaluation system is broken.

The New Specialists

by Francesca Kelly, October 2014

Here is a look at the wide world of Foreign Service Specialists.

The State Department Needs to Reevaluate Its Use of 360-Degree Reviews

by William Bent, September 2015

If used correctly, 360-degree reviews can be a valuable tool for an organization seeking to develop its workforce and foster a culture of leadership and management excellence.

Examining State's Foreign Service Officer Hiring Today

by Glenn H. Guimond, July-August 2016

Here's an inside look at the process of becoming a Foreign Service officer, considered the "gold standard" in professional recruitment.

A Roadmap for New Hires: 30 Rules to Survive and Thrive

by Stephen G. McFarland, July-August 2016

An experienced FSO ambassador identifies the unique attributes Foreign Service personnel should have and offers a guide to acquiring and perfecting them.

Straight Talk on Bidding: What You Need to Know Before Trying for that Heavily Bid Job

by Paul Poletes, April 2019

Most of the time, bidders' hopes are misplaced. Think you've got what it takes to land one of those "dream jobs"? Here's what you need to know.

FS HERITAGE

Discovering Our Consulate's History, **We Discovered Ourselves**

Digging deep into his post's history unearthed more than this FSO ever expected—including a passion for discovering and sharing knowledge to aid public diplomacy and boost morale.

BY MOISES MENDOZA

It all began with a claim I had heard repeatedly since arriving at post as a first-tour consular officer in the summer of 2017: Consulate General Matamoros, so the story went, had been founded in 1832 and was the world's oldest continuously operating U.S. consulate.

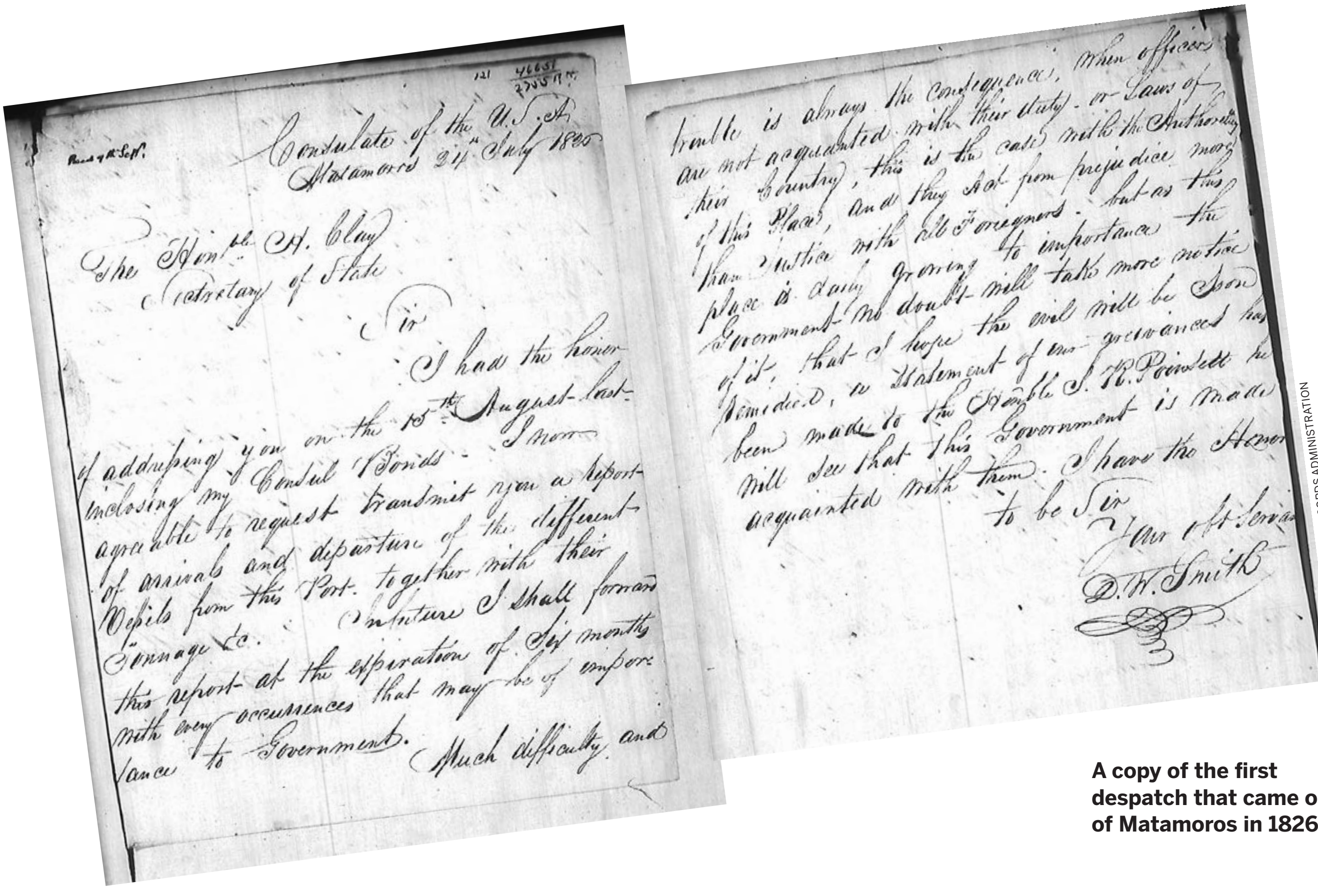
But I soon ran into a contradiction when I learned the consulate in Ponta Delgada in the Azores Islands, founded in 1795, has long been recognized as the world's oldest U.S. consulate. So was the founding date of our post in Matamoros as mythical as its claim to be the oldest consulate in the world? In fact, I would soon find, it was.

This is how my passion for correcting the historical record and using our rich, long-lost post history to advance U.S. foreign policy priorities began. As I researched my post's history, I realized that I was blazing a trail that any officer can follow to break ground and advance U.S. foreign policy objectives. We just need to know how.

My curiosity about Matamoros led me to the State Department's Office of the Historian. There, I was provided with scans of old personnel cards that seemed to indicate the first consul in Matamoros had been appointed in 1832. Indeed, official State Department records listed that date, too. I decided to dig deeper, however, and contacted the National Archives and the Library of Congress. I talked to the Bunche Library at the Department of State. I pored over archives of department publications.

Finally, at the University of Texas Rio Grande Valley, in Brownsville, Texas, I found the Holy Grail. In a copy of a National Archives and Records Administration microfilm publication containing reproductions of original records was the first despatch written by a consul in Matamoros—dated 1826, not 1832. Further investigation into newspaper records revealed that our first consul had actually been appointed in 1825, when the city was

Moises Mendoza left Matamoros, Mexico, in June 2019 after serving two years as a first-tour consular officer. His next post is Port-Au-Prince, Haiti, where he will be a political officer. He is currently working with the State Department's Office of the Historian on a project to enable posts to more easily access and use historical records. The views expressed in this article are his own and are not necessarily those of the U.S. government. The author would like to thank Bill McAllister with the Office of the Historian, David Langbart with the National Archives and Records Administration, and Foreign Service Officer Telside Manson for their assistance with this article.



Consulate of the U.S. A.
Matamoros 24th July 1826

The Honble. H. Clay
Secretary of State

Sir

I have the honor of addressing you on the 15th August last inclosing my Consul Bonds — I now agreeable to request transmit you a Report of arrivals and departure of the different Vessels from this Port together with their Tonnage &c. In future I shall forward this report at the expiration of Six months with every occurrences that may be of importance to Government. Much difficulty and trouble is always the consequence, when officers are not acquainted with their duty — or Laws of their Country, this is the case with the Authorities of this Place, and they Act from prejudice more than Justice with all Foreigners. but as this place is daily growing to importance the Government no doubt will take more notice of it, that I hope the evil will be soon remedied, a Statement of our grievances has been made to the Honble J. R. Poinsett he will see that this Government is made acquainted with them. I have the Honor to be Sir

Your obt Servant
D. W. Smith

NATIONAL ARCHIVES AND RECORDS ADMINISTRATION

A copy of the first despatch that came out of Matamoros in 1826.

known as Refugio. Its name changed to Matamoros the following year, in 1826.

The department's records were incomplete and, in some cases, erroneous. They had listed Matamoros and Refugio as two separate consulates, when they were actually one. Fortunately, I was able to work with the Office of the Historian to correct the department's account of the consulate's founding.

Digging deeper into newspaper archives from the 1800s, consular despatches and declassified department records, I realized how remarkable our consulate's history really was—and how incomplete our knowledge of it had become. For instance, buried in archival records was the fact that in 1862 our consulate had burned to the ground during a siege of the city. This was one of many violent incidents throughout the 1800s and early 1900s in Matamoros, a strategic location during various Mexican revolutions.

Another fact: the local business community found the consulate to be so valuable that its members had helped fight off attempts to close the consulate due to budget cuts twice, in 1948 and in 1995. There were even long-lost photos and original floor plans for the building that housed the consulate between 1872 and 1948.

I also discovered plenty of fascinating, and sometimes disturbing, drama. A consul in the 1860s cut all the records out of post accounting books before fleeing under a cloud of corruption charges. And in the 1930s, another consul's teenage son was caught trying to smuggle marijuana into the United States in his own car.

The coolest finds, however, were the stories of heroic employees who had been forgotten over the years, like the story of a consul who was shot in the cheek in 1851 while helping put out a fire during revolutionary street combat in Matamoros. Or the consul in 1913 who remained valiantly at post while fighting raged in the streets surrounding the consulate building.

And another, Consul Richard H. Belt, died an agonizing death during a typhoid fever outbreak while serving in Matamoros in 1844. Because he had never been recognized on the AFSA Memorial Plaques, I nominated him to be added, and the nomination was accepted.

When I shared these findings with my managers, American Citizen Services Chief Etan Schwartz, Consular Chief Elizabeth Alarid and Consul General Neda Brown, they responded enthusiastically and supportively. Within a few days, we were developing a Facebook campaign and a brochure about our rich, long-lost history for visitors to the consulate, working to rewrite erroneous information on our post website and integrating historical information into the consul general's speeches. We soon found that this project was helping to advance an important policy objective: strengthening the U.S.-Mexico relationship.

We also found ways to integrate my project into the everyday work of the consulate. As just one example, the American Citizen Services unit was able to use old newspaper articles and press releases to pinpoint the exact dates and circumstances of a 20-year-old incident as part of a fraud investigation.

But the most gratifying moment of my yearlong project came when CG Brown invited me to speak to the entire consulate

The coolest finds, however, were the stories of heroic employees who had been forgotten over the years.

community about my discoveries. Afterward, some colleagues approached me to discuss ideas of how to ensure our consulate maintained its history. Should we frame old consular despatches? Create a partnership with a local university to digitize all that we've discovered?

One colleague excitedly told me after my presentation that understanding the past can help us understand the consulate's integral role in northeastern Mexico. "We belong here, and we're part of the richness of this area," he said. "Seeing that come to life is really inspiring."

So why put effort into researching your own post's history? There's the abstract argument that knowledge of history can help right past wrongs, honor forgotten heroes and inspire us all toward a better future.

But there's also a more practical perspective. Posts can convert their own unique story into concrete public diplomacy and morale-boosting deliverables, just like in Matamoros. And the really good news: It's not that hard at all.

Your starting place should be the State Department's Office of the Historian, which has great resources and advice. Historian Tiffany Cabrera started me off by emailing me digitized copies of "consular cards," file cards begun in the 1800s that listed all U.S. consular personnel assigned to Matamoros through the 1950s (although, as I later found out, the records weren't completely accurate). She also recommended other places to explore, such as the Association for Diplomatic Studies and Training's oral history project, the State Department's Bunche Library and AFSA's website, which has an amazing digital archive of every issue of *The Foreign Service Journal* since 1919.

By mining the above resources, you'll have a decent amount of information. But there's more. Your next step should be the National Archives and Records Administration, the repository for the permanently valuable records of the U.S. government, including the State Department. The department's central files are the key records. The pre-1907 diplomatic and consular despatches (reports to the department) are available through various issues

The U.S. consulate in Matamoros in the early 20th century.

MÉXICOENFOTOS

positioned to tell their stories because of their proximity to world-class American universities, which often have meticulously maintained information regarding nearby border posts. Also, their activities have been reported on extensively by U.S. newspapers. Indeed, in many instances, relying almost completely on American sources may be necessary.

For instance, my research revealed that the entire local archive of Matamoros newspapers from the 1950s and 1960s had been destroyed in a flood. Yet the vast majority of U.S. newspapers, from *The New York Times* to the *Brownsville Herald* and stretching as far back as the 1700s, are available through sites such as newspaper.com or newspaperarchive.com. Many old consular records are also available through ancestry.com. Although some of these sources are behind a paywall, there are also free options like the excellent "Chronicling America" newspaper series of the Library of Congress.

How deep you dig will depend on how deep you want to go. You might be satisfied by simply tracking down and framing the very first consular despatch ever written from your post. Or you may become so addicted to the research that, like me, you just won't be able to stop. If that happens, your public affairs officer and front office will love you for it.

And you never know how your efforts might connect you to something bigger. As it happened, while I was researching at the post level, the Bureau of Consular Affairs was engaged in an effort to explore the history of the U.S. consular service globally and included some of my research in its work. In addition, through a joint project, the Office of the Historian and I are creating a toolkit that will empower posts to more easily tell their histories.

Posts can convert their own unique story into concrete public diplomacy and morale-boosting deliverables, just like in Matamoros.

of the "Despatch" series of National Archives Microfilm Publications and distributed to libraries around the world (find the location of the "Despatch" series you're looking for at worldcat.org). They are also available for purchase at eservices.archives.gov/orderonline.

The entirety of the central files for the 1906-1910 period and some records for the period 1973-1979 are available online. For the most part, you'll likely need to travel to the National Archives itself for the records in-between, but they're there for the searching if you have the time. The central files from 1980 and later remain in the custody of the department.

Other useful sources of information may include your nearby universities or the local foreign ministry, which likely has an extensive archive of old correspondence between your post and the local government. During my research, I realized that the Mexican government had maintained more than 100 years of fascinating records pertaining to past U.S. consuls in Matamoros, all available and open to the public in Mexico City. In addition, I found that the University of Texas Rio Grande Valley, across the border from Matamoros in Brownsville, Texas, was eager and excited to help.

Border consulates in Mexico and Canada are particularly well

Throughout my investigation into the history of Matamoros, I realized I was a pioneer in a way. My project had plugged historical holes and inspired my colleagues. And for that, I'm grateful.

There's a very good chance your own post's history contains unusual, wild and incredible stories that have been lost to oblivion. Don't assume that anyone has sought them out before. You might be the one to tell those stories to your colleagues—and to the world.

FEATURE

The Power of LANGUAGE

Here's how an "English for Work" program improved security in Kabul.

BY KRISHNA SHARMA

Knowledge of major languages for national security, diplomatic stability and international reliability is as important as bearing arms in war zones. Apart from serving the purpose of communication, languages are also recognized as powerful security enablers in diplomatic settings.

Take Kabul, Afghanistan, for instance, where the challenge of protecting the most vulnerable places—like the U.S. embassy, where I am presently posted—is multifaceted and, as elsewhere, local employees are a vital part of the security team on the ground.

Here's how an "English for Work" program launched in 2018 made a difference for the Gurkha Guard Force, a unit of Nepali soldiers critical to Kabul embassy security. The improvement in their English-language fluency, in turn, raised the efficiency and effectiveness of the mission's security system overall.

Communications and Security

It is no secret that not being able to communicate effectively or misunderstanding crucial information can be detrimental in sensitive situations. The inability to communicate clearly and precisely can delay the execution of critical tasks and increase risk for diplomats and others working to bring peace to politically volatile places.

Besides making English proficiency one of the prerequisites for local nationals recruited as security guards, the Department of State has employed scores of Dari-, Pashto- and English-speaking interpreters to help establish and ensure better communication in Afghanistan. This is essential so that guards can effectively carry out the task of securing the International Green Zone from the Islamic State and the Taliban at a time when multiple complex attacks are occurring right at the border of the zone. The Taliban, IS, Daesh and the Haqqani network, among others, have never ceased concentrating their violent focus on the Afghan capital.

Third-country nationals (TCNs)—such as Gurkha Guard Force personnel—have to meet even harsher selection criteria for this critically important mission. A background investigation, security investigation and physical efficiency battery, or PEB; weapons qualifications and previous battlefield experience; and English-language proficiency all are a must for these TCNs.

In Kabul, the Gurkha Guard Force has been a critical part of the embassy security force for the past 14 years. The GGF has a storied history of bravery, honesty, diligence and distinction for a peaceful world order that stretches from World War I to today. Commonly known as "men of action rather than words," they

Krishna Sharma is a vetting specialist and linguist who has served at U.S. Embassy Kabul's Regional Security Office since February 2018.

U.S. EMBASSY KABUL

The Gurkha Guard Force at the first session of the "English for Work" program in Kabul, June 2018.

display a legendary professionalism and dedication to duty. For this reason, they have been entrusted with vital security assignments that range from securing Buckingham Palace in England to safeguarding the 2018 North Korea–United States Summit in Singapore, to name but two examples.

From a security standpoint, the fact that the Gurkha soldiers communicate with each other in their native Nepali, a little-known language, is a plus: Their exchanges are not easily picked up by locals, and secrecy can be maintained. At the same time, because English is their second language, most of the Gurkha soldiers struggle when it comes to communicating professionally in English. The caution they take while exchanging information is proof of how careful they are while discharging their duties. They are very mindful of the consequences of miscommunication in as intensely perplexing a place as Kabul.

U.S. EMBASSY KABUL

An English for Work class at Camp Seitz in Kabul.

"English for Work"

Recognizing the significance of the challenges the Gurkhas face, Diplomatic Security's Regional Security Office in Kabul initiated an "English for Work" program for GGF personnel in June 2018. Since the program also entails techniques of deadly force use, it was designed exclusively for members of the GGF (local-hire Afghans do not handle weapons). Its aim is to ensure clear, detailed and unambiguous communication when it comes to strategizing ideas in the battlefield.

The English for Work program, which runs as a supplement to the mandatory dedicated training for at least three months annually, is intense; and GGF personnel are required to pass the final exam to continue with their employment. The training includes discussions, presentations, roleplay, workshops and frequent security drills. Approximately 500 GGF personnel have benefitted from the classes.

The program was designed for the specific purpose of arming GGF personnel with sufficient professional English fluency to be trained at a higher standard and to be able to immediately and effectively apply the lessons learned in the field—namely, to accurately and quickly report security incidents that they might potentially engage in, whether experienced directly or occurring around their work stations or watchtowers.

Those who attended the classes are now comfortable using English in the face of adversity and danger, and they are able to make tough decisions when required. They have mastered the ability to quickly and correctly react to commands or threat situations and then verbally report to the higher authority, or write the incident report in a detailed, accurate and timely manner.

"The classes not only helped me professionally during my security duty in the embassy, but also helped me gain confidence while speaking in other settings," says senior GGF member Nar Bahadur Thapa. "Additionally, I now know how to write incident reports in an accurate and timely manner, which is a crucial aspect of the job."

At his concluding ceremony, GGF member Bhim Bahadur Gurung said that the program had been "a double reward for me, since I was able to develop my English language skills while in the workplace."

A Critical Dimension

The GGF personnel are now able to carry out specific job duties seamlessly by communicating fluently with their chain of command, expatriates and locally employed guards during times of crisis at the command of the regional security officer. They now know how important it is to listen before accurately responding with the five W's and one H (Who, What, Where, When, Why and How). They are able to translate their understanding of English into the day-to-day spoken and written word, which has a direct impact on the overall security of the U.S. mission in Kabul.

Strengthening their English-language capabilities has added a critical dimension to GGF members' unique ability to communicate efficiently and secretly among themselves using Nepali, much as the Navajo "code-talkers" used their language as a means of secret communication during World War II.

As the case of the Gurkha Guard Force and the English for Work program in Afghanistan shows, it is worth keeping in mind German journalist and writer Kurt Tucholsky's saying: "Language is a weapon; keep it honed."

Pictured: the recipients of AFSA's 2019 awards for constructive dissent, exemplary performance and lifetime contributions to American diplomacy.

The Passing of F. Allen "Tex" Harris

The American Foreign Service Association is saddened to announce the passing of Franklin Allen "Tex" Harris, one of the most consequential people in the history of the association and a man who defined the term "larger than life."

Tex Harris died on Feb. 23 at a hospital in Fairfax County, Va. He was 81.

Over the past 50 years, Tex made enormous contributions to AFSA and the U.S. Foreign Service. After entering the Foreign Service in 1969, he joined with fellow "Young Turks" Lannon Walker, Charles Bray, Herman "Hank" Cohen and others to ensure that American diplomats had a clear voice in establishing the standards for their profession and that AFSA would be an institution that would defend both the Service and its members.

Tex served as vice president for the State Department constituency on the AFSA Governing Board from 1973 to 1976, during which time he worked with William Harrop and Thomas Boyatt to remake AFSA as the union for all Foreign Service employees. He was instrumental in drafting and negotiating the core labor-management agreements in the various foreign affairs agencies.


AFSA/JOAQUIN SOSA

Tex Harris, at the AFSA Awards Ceremony on Oct. 16, 2019, at the State Department, where he received the 2019 Award for Achievement and Contributions to the Association.

He remained active in AFSA battles throughout his distinguished 36-year Foreign Service career, serving two terms as AFSA president from 1993 to 1997. During his tenure as president, he fought against reductions-in-force at USAID, government shutdowns, the appointment of unqualified political ambassadors and major management abuses.

After retiring from the Foreign Service in 1999, Tex continued his close involvement with AFSA. In 2000, he was instrumental in creating the F. Allen "Tex" Harris Award for Constructive Dissent by a Foreign Service Specialist to bring the same recognition to specialists as afforded to Foreign Service officers since 1968.

He was elected by the AFSA membership to multiple terms on AFSA Governing Boards during the 2000s and 2010s as Secretary and Retiree Representative—thus contributing to setting AFSA's agenda and policies for two more decades.

Widely referred to as "Mr. AFSA," Tex remained in contact with scores of retired Foreign Service colleagues—sharing information and connecting them with other colleagues to discuss major issues facing today's Foreign Service. He was an active member of the group of former AFSA presidents who advise AFSA and other FS groups.

In October 2019, AFSA honored Tex with its award for Contributions to the Association for his decades of tireless support for AFSA and the career Foreign Service. During the ceremony he gave a typically rousing speech, which had the audience cheering him loudly. It was Tex at his best, and the honor was well deserved. Look for an Appreciation in the May issue.

AFSA Foreign Service Artist Showcase

"Empire Half-Light" (2016), by artist and former FSO Rosemarie Forsythe, was featured on the cover of the March 2020 *Foreign Service Journal.* Forsythe was one of four artists featured in the AFSA Foreign Service Art Showcase on Feb. 6 (see article and photos on page 62).

CALENDAR

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

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

April 30
11 a.m.-5 p.m.
Foreign Service Day Open House at AFSA including Next Stage: "Speaking Opportunities to Share Your Expertise"

April 30
6:30-8:30 p.m.
Foreign Service Day Reception Co-hosted by AFSA & DACOR
DACOR Bacon House 1801 F St NW Washington, D.C.

May 1
Foreign Service Day AFSA Memorial Ceremony

May 15
Deadline: Nomination for AFSA Dissent and Performance Awards

May 20
12-2 p.m.
AFSA Governing Board Meeting

Out of an abundance of caution over the COVID-19 coronavirus, in March AFSA decided to postpone all AFSA programming during the weeks of March 16 and March 23. Decisions on programs and events after March 30 will be made as additional information becomes available.

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Giving the MSI the Attention It Deserves

Thanks to all who took part in our recent survey on the Meritorious Service Increase pilot program. AFSA has decided to extend this pilot for another year and use the survey's results to make the process more efficient and easier to use.

We are currently negotiating with our colleagues in the Performance Evaluation division of the newly named Bureau of Global Talent Management (GTM/PE) with the goal of making the program a more accepted part of the award nomination process.

As we do this, we welcome your continued input. (See the article on p. 37, which presents the survey results and the history of MSI in more detail.)

From the survey, we learned that supervisors and others are just not nominating their staff members and colleagues frequently enough. The top reaction to our survey question "Have you nominated someone under the pilot program?" was that nominations are too burdensome. It appears that this is due in part to the fact that a separate nomination form needs to be filled out.

Another reason appears to be the amount of time it takes to learn whether the nominated employee receives an award. We heard that nominators often choose to go with other more tried-and-true awards, such as a Meritorious Honor Award or Superior Honor Award, where the decision is made more quickly, either at post or at the bureau level.

These two factors, GTM told us, contributed to MSI money being left on the table.

A Different Kind of Award

The MSI is meant to be the highest monetary award given to FS personnel. It is different from the MHA or SHA in terms of prestige and financial benefit. It's the next best thing to a promotion, financially speaking, as it is a permanent step increase that has come to be known as "the gift that keeps on giving."

It is a permanent step increase that has come to be known as "the gift that keeps on giving."

Because the award is unique, the MSI pilot program requires a separate nomination form, separate criteria and special MSI panels to determine the awards.

Until the launch of the pilot, the vast majority of MSIs were awarded automatically to people who were in the top 10 percent recommended for promotion but who did not reach the cutoff. (A small number of MSIs were also given to bureaus to be awarded based on nominations.)

While it is certainly easier to just let the selection boards handle this, when GTM/PE and AFSA looked at the MSI award more carefully, we realized that it was actually meant to reward high accomplishment in the current position and rank, not to be a measure of future potential.

With this realization, we worked to create an MSI award process that highlights the importance of the award but also "democratizes" the process by opening it up to everyone, not just those who are up for promotion.

Now, not only can supervisors nominate their staff, but subordinates can also nominate their supervisors, and peers can nominate peers. The pilot program also ensures that regardless of the number of promotion opportunities available, generalists and specialists are allotted MSI awards according to their percentage in the Foreign Service.

Our Plea: Submit Nominations!

AFSA is doing its part to make the process more efficient and understandable so that when an employee's actions are deserving of an MSI, the nominator can confidently choose an MSI over other awards.

Working with GTM/PE, we will focus on ensuring:

- that the criteria for the award are clearly explained and understood—especially as to how these criteria differ from those for an MHA or SHA;
- that the period in which nominations are submitted is logical and is also clearly understood; and
- that MSI panel decisions are made and announced within a reasonable amount of time. This is important because some of our members have told us that nominators often want to see their nominees rewarded while at post, if possible.

As AFSA strives to ensure that the MSI award program stays true to the intent of the award while being "user-friendly," we ask all of our members to take advantage of the pilot program and submit nominations.

The one-page nomination form is not time-consuming and can be submitted during the current open season (April 15 to June 15) for the award.

We can have the best pilot program ever, but it won't make any difference if nominators, post leadership and bureaus do not give the MSI the attention it deserves. ■

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Labor Management Relations—A Critical Matter for All

AFSA is both the principal advocate for the long-term institutional well-being of the professional career Foreign Service and responsible for safeguarding the interests of AFSA members.

For this column, I want to share a few thoughts related to labor management, a critical role for safeguarding member interests.

AFSA has a strong, dedicated Labor Management team—an impressive cadre of professionals who advance AFSA's mission at both the individual and policy levels.

In my approximately six months on the job, I have learned quite a bit, both from the AFSA LM team and also from the many USAID colleagues engaged in the labor management area.

This is a fascinating and specialized field, and I would encourage you to take a look at AFSA's website: afsa.org/labor-management-guidance.

Labor management relations are so critical to a modern organization's effectiveness that the Foreign Service Act (my favorite act) has an entire chapter on the topic (Chapter 10).

The act mandates that "the unique conditions of Foreign Service employment require a distinct framework for the development and implementation of modern, constructive and cooperative relationships between management officials and organizations representing members of the Service."

This is more than rhetoric—it is one more instance of Congress recognizing that FSOs operate in a unique environment under exceptional circumstances, and that the agency and AFSA should engage accordingly.

As AFSA VP for USAID, I am committed to doing my best to build, maintain and strengthen this framework for the benefit of the agency's mission and its people.

AFSA Governing Board Meeting, Feb. 19, 2020

Changes to Legal Defense Fund SOPs: The Governing Board approved the following changes to the standard operating procedures of the Legal Defense Fund:

- Raise the donation amount requiring Governing Board approval to $10,001 or more.
- Allow AFSA to draw funds from the LDF if the association needs to retain outside legal counsel to assist in a matter of institutional significance.
- Consolidate all relevant guidance into one LDF SOP document.
- Allow the LDF Committee to make the final decision on funding denials. The decision must be unanimous. Further, a member may appeal the committee's denial to the Governing Board.

Legal Defense Fund Requests: The Governing Board approved a payment from the Legal Defense Fund of $2,358.18 to the attorneys of an AFSA member for legal services related to the impeachment proceedings through Dec. 31, 2019.

The Governing Board denied a Legal Defense Fund request from an AFSA member unrelated to the impeachment hearings.

Everything You Need to Know about the TSP

Thrift Savings Plan Training and Liaison Specialist Arvella Collins visited AFSA headquarters on Jan. 8 to discuss "What You Need to Know About the Thrift Savings Plan—2020." The presentation included information on new features of the TSP.

For most federal workers, the TSP is a great option for saving for retirement. TSP offers portfolio diversification, low management fees and reallocation of contributions.

Ms. Collins, who works for the Federal Retirement Thrift Investment Board, geared her talk toward pre-retirees. But the information is also useful for those already retired who wish to review their TSP and hear about new developments.

The program included the following topics:

- First Steps: Preparing for separation
- Turning Savings into Income: The TSP retirement income options
- Withdrawal Rules: Other considerations
- Planning Your Legacy: TSP death benefits
- Getting Help: Resources for participants

AFSA members may visit afsa.org/video to watch a recording of the presentation.

Contact: jay.carreiro@trade.gov

We've Seen This Movie Before

Recently, I was reading through the International Trade Centre's comprehensive *Guide to Commercial Diplomacy*.

Any commercial officer perusing its pages will instantly be familiar with the principles and objectives laid out in the guide, such as promoting trade and investment, gathering business intelligence, creating partnerships, and setting priorities and expectations for markets and clients. All good stuff.

Here in Washington, however, it's budget season again (I'm writing this in mid-February). That means we have received the administration's annual proposal to slash foreign affairs and commercial diplomacy funding.

It has now been four straight years that the administration has proposed significant cuts to our budget—this year to the tune of $55 million. That translates into shuttering 32 commercial posts abroad and 18 export assistance centers domestically. It's the largest single cut ever proposed, as far as we can tell. So, what does this mean?

Well, first, it means the administration is saying two very different things at once. On one hand, it's saying (in public, anyway) that your government has to be strong on trade. It needs to be out there helping U.S. businesses compete internationally against foreign competition by knocking down trade barriers and opening foreign markets to U.S. goods and services.

On the other hand, it is saying that this work that is so important to our economic security—the exports and foreign direct investment that are so important to job creation and prosperity—really isn't that important at all. At least, it isn't important enough to spend any money on. That's quite a conundrum.

Indeed, the desire to cut funding to the Commercial Service has always been puzzling, especially when you realize the outsized return on investment it generates for taxpayers.

The Commercial Service has an operating budget of around $340 million. That's the cost of less than three F-22 fighter jets.

And what does that relatively tiny investment get you? It gets you jobs, economic growth and security, and leads to innovation. It's a simple fact that companies that export, regardless of size, tend to be more innovative, resilient and successful than those that don't.

It's not just the ITC saying this in a beautifully packaged report.

Clearly, governments around the world believe this is the case. They support this conclusion in their own funding priorities. Countries with much smaller economies, such as the United Kingdom and Germany, have more diplomats abroad dedicated to commercial work than the United States.

And we would need several more pages to describe how much China invests in export promotion and commercial diplomacy.

Fortunately, Congress has traditionally recognized the outsized role trade and investment plays in our economy and overall security. Hopefully, the administration will see that, too.

AFSA Seeks Volunteers for Elections Committee

AFSA seeks candidates to fill vacancies on its Committee on Elections. The term runs from July 15, 2020, to July 14, 2022. Ideally, prospective committee members will live in the Washington, D.C., area for the duration of the term, because the position's responsibilities, including various election-related events, are based here.

The committee oversees the biannual AFSA Governing Board election process and works with AFSA staff to ensure the integrity of the election and its results.

Per the AFSA bylaws (Article VII, Section 1(b)), the committee must have at least five members and include representatives from all constituencies.

Committee members may not serve as chair of any other AFSA committee and must agree to refrain from nominating or serving as a member of the AFSA Governing Board for six months after their term of office.

Interested candidates should contact Director of Programs and Member Engagement Christine Miele (miele@afsa.org) to receive a position description. Statements of interest are due by May 13.

Committee appointments will be made at the May 20 AFSA Governing Board meeting.

AFSA ON THE HILL | BY KIM GREENPLATE

Building on Fiscal Year 2020 Gains

With passage of the Fiscal Year 2020 National Defense Authorization Act and the final FY 2020 appropriations package in December, AFSA has much to celebrate.

An increase of more than $500 million for the State Department's "Overseas Programs" fund advanced AFSA's initiative to see more mid-level FSOs serving abroad for the second year in a row.

In its report about State/USAID appropriations in the 2020 package, Congress was also clear that it supports an increase in the number of Foreign Service positions abroad. AFSA is keeping a close eye on the State Department's implementation of this goal and will continue to push for a "field-forward" Foreign Service.

The FY 2020 NDAA also includes 12 weeks of paid parental leave for federal employees, something that has been a top AFSA priority for decades. AFSA is working to ensure appropriate implementation guidance from the Office of Personnel Management and from human resource offices at each of the foreign affairs agencies.

It is imperative that implementation make sense for the Foreign Service as this new benefit is phased in by the federal government. Paid parental leave is set to take effect for births or placements after Oct. 1.

This spring, AFSA will look to Congress for oversight of these legislative accomplishments and will seek to discover ways to build on these gains in the next fiscal year, FY 2021. This is especially important given the 2020 election. Election years tend to be the least productive for Congress.

AFSA anticipates that tough conversations will take place among congressional leadership regarding nondefense discretionary funding in FY 2021—without dramatic funding increases and within the constraints of the 2019 Bipartisan Budget Act. The 2019 BBA has set a nondefense discretionary funding ceiling of $626.5 billion in FY 2021, just $2.5 billion above the FY 2020 ceiling of $624 billion.

Other national priorities such as the politically popular federal veterans' healthcare program are expected to cost even more to maintain in FY 2021. And these priorities will be competing for the same pool of money as the International Affairs Budget. The small budget cap increases, along with a proposed 22 percent cut in President Trump's FY 2021 budget request, create unfavorable odds for even *maintaining* the IAB in FY 2021.

While focusing on the outcomes from the big wins of FY 2020, it will be essential to protect the IAB increases we have seen over the past few years to support our diplomats and development professionals at home and overseas.

Retirement Planning Five to 10 Years Out

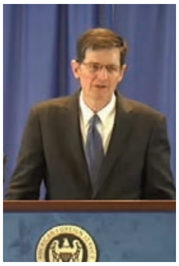
AFSA Retiree Vice President John Naland led his annual presentation on Retirement Planning Five to 10 Years Out on Jan. 29 at AFSA headquarters. Mr. Naland is the former director of the Department of State's Office of Retirement.

Mr. Naland summarized steps that mid- and late-career employees should take to best position themselves for life after the Foreign Service.

Topics covered include:

- Understanding your pension, aka annuity
- FSPS annuity supplement
- Social Security: When to start
- TSP: Stocks vs. bonds
- Health insurance and life insurance after retirement
- Survivor benefit options
- Long-term care insurance
- Divorce and FS retirement benefits
- Credit for prior civilian or military service
- Beneficiary designations
- Savvy financial moves during your last year
- Federal reemployment after retirement
- Prognosis on future retirement benefits
- Retirement planning resources

A video of Mr. Naland's presentation is available to AFSA members at afsa.org/video. Also, see his article, "Retirement Planning 101" on page 67.



AFSA

John Naland, AFSA Retiree VP, shares tips for retirement planning on Jan. 29 at AFSA headquarters.

Foreign Service Artists Featured at AFSA Showcase

On Feb. 6 AFSA hosted its first-ever Foreign Service Artists Showcase, an art exhibit featuring works by former FSOs Ambassador (ret.) David Pearce, Rosemarie Forsythe, Cynthia Farrell Johnson and Judy Buelow.

Along with the exhibition of their works, many of which were for sale, the artists made brief remarks about the influence of the Foreign Service on their art.

Inspired by living and working around the world, Rosemarie Forsythe's paintings celebrate the power of ideas that have influenced the course of history or changed the way we think about the world.

She uses acrylics, gouache, Flashe, gold leaf, mica chips and handmade paper to render symbols, math/physics equations, algorithms and intellectual puzzles in jewel-like paintings. Her style mixes matte gem tones with metallics to achieve a look reminiscent of Byzantine icons or 15th-century illuminated manuscripts.

In the course of her past careers as a diplomat, policymaker and international business executive, Ms. Forsythe lived in seven countries and visited more than 60 countries. Each of those careers, she explained, allowed her to see the world in different ways and to be exposed to many different cultures and types of art.

AFSA/CAMERON WOODWORTH

Judy Buelow discusses her art at the AFSA Foreign Service Art Showcase on Feb. 6.

Her works have appeared in solo and group shows in New York and the Washington, D.C., area. She is a juried member of the Reston Art Gallery in Virginia. Her website is www.rosemarieforsythe.com.

Cynthia Farrell Johnson's paintings have been exhibited in cultural centers and galleries in Africa and Latin America. As a participant in the Department of State's Art in Embassies program, Ms. Johnson has placed her work in U.S. ambassadorial residences in Niger, Nicaragua, Serbia, Ecuador, El Salvador and Panama.

A fan of vibrant colors, Ms. Johnson works in gouache, acrylic and mixed media. Her paintings are inspired by the people she met and places where she lived during a 25-year career as a diplomat.

Ms. Johnson lives in Silver Spring, Md., and says she draws much of her inspiration for themes and color schemes from the Washington, D.C., region's rich cultural diversity. She is a member of Pyramid Atlantic

AFSA/CAMERON WOODWORTH

Cynthia Farrell Johnson's paintings have been exhibited in cultural centers and galleries in Africa and Latin America.

AFSA/CAMERON WOODWORTH

Rosemarie Forsythe (foreground) at the AFSA Foreign Service Art Showcase. Her painting, "Half-Light," was selected to be the cover image of the March issue of *The Foreign Service Journal*.

Art Center in Hyattsville, Md., where she also has her art studio. Visit her website at cfjfinearts.com.

Judy Buelow began her Foreign Service career in 1985, focusing on Latin America and Africa.

"Whenever I traveled to a new country, I painted scenes from the everyday life of my new community, always focusing on the people in all their diversity, beauty and expressiveness," she explained. "In each painting, I would try to capture a special moment and convey a unique sense of the place, while also portraying something of the universal human experience."

David Pearce, who was unable to attend the showcase, but whose art was displayed, is a native of Maine. He retired from the Foreign Service in 2016 after serving nearly 35 years in 11 posts overseas.

An avid student of Greek, Roman and Islamic history, art and literature, Amb. Pearce is a self-taught artist. His travels nourished a lifelong habit of drawing, but he began to paint actively only in Algiers in 2008. He served as ambassador to Greece and Algeria.

His medium of choice is watercolor, because he likes the degree of difficulty and the constant challenge, as he puts it, of turning sudden developments into unexpected territory.

AFSA Welcomes Incoming Classes

On Feb. 7 AFSA welcomed 81 members of the 155th specialist class to its headquarters in Washington, D.C., for a lunch and overview of AFSA's role in supporting the Foreign Service.

The 155th class features four construction engineers, five diplomatic couriers, three facility managers, two financial management officers, three general service officers, 17 information management specialists, two Foreign Service medical providers, 19 office management specialists, 22 special agent candidates, two security engineering officers and two security technical specialists.

Almost half of this group of specialists have previously worked for the State Department as eligible family members, interns, contractors or in other roles.

AFSA President Eric Rubin hosted the luncheon. Nearly 65 percent of the attendees chose to join AFSA at the event.

On Feb. 12, AFSA again opened its doors for a luncheon to welcome 69 (out of 85) members of the 201st A-100 class.

Before joining the Foreign Service, members of the 201st had engaged in a wide variety of interesting activities, from fishing for piranha in Venezuela, running a company that made fake meat and participating in the highest-elevation sprint-length triathlon in the United States to appearing on *Jeopardy*!, performing as a dancer at the Kennedy Center, living and working in Antarctica, working for NASA, climbing Mount Fuji and commuting to work by horseback.

Other accomplishments cited by these new FSOs include becoming engaged on top of Machu Picchu, spending a night in every state in the Union, playing professional basketball in Bolivia, being bitten by a poisonous centipede, winning the 2000 National Geographic Bee, memorizing the opening lines of *Beowulf* in Old English and successfully intervening in a robbery in Geneva.

Almost 60 percent of the new officers have prior State Department experience. And some have had other federal government work experience as civil servants and contractors. The class also includes a number of veterans of the U.S. armed forces.

In the private sector, members of the 201st have worked as developers, analysts, attorneys, reporters, researchers, teachers and interpreters. More than 70 percent of class members have post-graduate degrees, and many have worked, studied or volunteered abroad.

Ambassador Rubin hosted the luncheon. Eighty-three percent of the attendees joined AFSA.

Welcome to the U.S. Foreign Service!

FOREIGN SERVICE INSTITUTE

Members of the 155th specialist class.

AFSA/CAMERON WOODWORTH

AFSA Director of Professional Policy Issues Julie Nutter, at left, speaks with members of the 201st A-100 class on Feb. 12 at AFSA headquarters.

FOREIGN SERVICE INSTITUTE

Members of the 201st A-100 class celebrate Flag Day on Feb. 19 at the Foreign Service Institute.

Call for Nominations: 2020 Exemplary Performance Awards

One of the highlights of being a member of a highly skilled and dedicated workforce is the pleasure of seeing colleagues perform at the highest level, delivering wins for their office, post, bureau and agency.

We all see such performance every day, no matter where we may be posted. AFSA takes great pleasure in being able to single out these top performers and give them a deserved moment in the spotlight.

AFSA is now accepting nominations for our annual awards for exemplary performance. The recipient of each of these awards is invited to attend AFSA's annual award ceremony, where their family, friends and colleagues can celebrate their accomplishments, and the Foreign Service community can thank them for a job well done.

Nominations for these awards are due on May 15, 2020.

• **The Nelson B. Delavan Award** recognizes a Foreign Service office management specialist (OMS) who has made a significant contribution to post or office effectiveness and morale, both within as well as beyond the framework of their job responsibilities.

• **The M. Juanita Guess Award** recognizes a Community Liaison Office coordinator (CLO) who has demonstrated outstanding leadership, dedication, initiative or imagination in assisting the families of Americans serving at an overseas post.

• **The Avis Bohlen Award** honors a Foreign Service family member whose volunteer work with the American and foreign communities at post has resulted in advancing the interests of the United States.

• **The Mark Palmer Award for the Advancement of Democracy** is bestowed on a member of the Foreign Service from any of the foreign affairs agencies, especially those at the early- to mid-career level, who are serving domestically or overseas. The award recognizes the promotion of American policies to advance democracy, freedom and governance through bold, exemplary, imaginative and effective efforts during one or more assignments.

Neither nominators nor nominees need be members of AFSA. Any member of the Foreign Service at any agency (State, USAID, FCS, FAS, APHIS or USAGM) is eligible.

For additional information and nomination forms, please visit afsa.org/performance or contact AFSA Awards and Scholarships Manager Theo Horn at horn@afsa.org or (202) 719-9705.

AFSA Outreach Campaign Highlights the Foreign Service as the First Line of Defense

The primary goal of AFSA's outreach is to tell the story of the U.S. Foreign Service. Many of our important stakeholders inside the Beltway understand the work and value of the Foreign Service. But to the general public, the work of American diplomats may seem removed from their day-to-day reality.

To address this distance, AFSA has partnered with the Una Chapman Cox Foundation for the past two years to develop public outreach messaging to help draw the connections, showing how the work of members of the Foreign Service affects Americans at home.

Last year's "Economic Diplomacy Works" campaign successfully highlighted the work the Foreign Service does to promote American prosperity.

This year's campaign, "U.S. Foreign Service: The First Line of Defense," aims to convey to the American public the role our Foreign Service plays in keeping various threats at bay and dealing with knotty challenges.

Throughout this campaign, our goal is to highlight the many and critical ways in which members of the Foreign Service are protecting and advancing our national security, preventing threats of all kinds—including economic, political, climate, disease and cyber—to safeguard Americans at home. To help guide this year-long effort, AFSA has brought on board a strategic messaging coordinator, Nadja Ruzica.

AFSA/CAMERON WOODWORTH

Nadja Ruzica, AFSA's new strategic messaging coordinator.

We are looking at new channels and new audiences for this message. One of our major campaign initiatives this year is focusing on community colleges, which are found in most cities throughout the United States. Community colleges offer an opportunity to engage with students and faculty on the work of the Foreign Service, and also to reach the broader community.

We encourage all AFSA members to get involved in this year's campaign, whether by being active in the Speakers Bureau, contributing stories and examples of how the Foreign Service acts as our country's first line of defense, or sharing messages on social media (or all of the above!).

If you teach at a community college—or know someone who does—please let us know and join us in spreading the message.

We have developed communications materials that you can find on our website, afsa.org, and we regularly update our calendar of events.

You might want to familiarize yourself with this year's central message by watching AFSA's new video that shows how the Foreign Service helps keep threats at bay. This video is tailored for general audiences that are not yet familiar with the work of the Foreign Service. The video can be found at afsa.org/video.

We look forward to your energy, ideas and involvement in AFSA's outreach campaign. If you would like more information on how you can help us spread the First Line of Defense message, please contact ruzica@afsa.org.

You can also learn more at the AFSA Foreign Service Day Open House at AFSA headquarters on April 30.

AFSA Hosts Breakfast for Ambassadors

AFSA President Eric Rubin speaks to U.S. chiefs of mission on Feb. 25 at AFSA headquarters. The ambassadors were in Washington, D.C., for the State Department's Chief of Missions Conference.

Retirement Planning 101

It may be years away, but the sooner you think about and plan for your retirement, the better it will be.

BY JOHN K. NALAND

Who in their late 20s to early 50s, preoccupied with the demands of work, family and daily life, has time to plan for a retirement that is many years away? The answer is that we all had better give retirement some advance thought if we wish to be well positioned to enjoy life after the Foreign Service. I know you're busy, so here is a quick guide for employees who realize that retirement planning is important but have not yet gotten started.

Show Me the Money

Many Foreign Service members have only a vague idea of what makes up their retirement package. That, obviously, makes it impossible to do even basic planning. So here is an overview focused on those of us who joined after 1983 and are thus in the Foreign Service Pension System. Once FSPS participants reach the age and years of service required to qualify for an immediate retirement, here is what we receive:

Pension. Our monthly annuity check is based on our "high three" average salary and years of service. The "high three" salary is calculated by adding our average basic pay for our three highest-paid consecutive years and then dividing by three. Basic pay includes regular pay, domestic locality pay and overseas virtual locality pay, but excludes allowances, differentials and overtime. This "high three" salary is then multiplied by 1.7 percent for each of the first 20 years of service, plus 1 percent for each additional year. For example, an employee retiring with 25 years of service and a "high three" salary of $100,000 would qualify for an annual annuity of $39,000. If the employee elects to provide annuity and health insurance benefits to a surviving spouse after that annuitant's death, the employee's annuity is reduced by 10 percent to $35,100.

Social Security. FSPS members pay into Social Security throughout our careers and thus qualify for Social Security benefits, beginning as early as age 62 for those willing to take reduced monthly payments in return for a longer benefit period. Because most Foreign Service members qualify to retire before age 62, federal law affords us an FSPS annuity supplement until age 62. This supplement is an additional payment that is essentially what Social Security would pay if it could pay before age 62. The annuity supplement ends at age 62 when the annuitant is eligible to apply for Social Security. It ends even if the annuitant does not apply for Social Security then.

Thrift Savings Plan. No matter how many years you serve, your FSPS annuity plus Social Security will not come close to replacing your pre-retirement income. Thus, the Thrift Savings Plan must be a key part of your retirement planning. Contribute 5 percent of your salary and Uncle Sam will match it—"free" money that no one should pass up. To position yourself well for retirement, you should contribute as close as possible to the

ISTOCKPHOTO.COM/ARKIRA

annual maximum ($19,500 in 2020) and take advantage of post-age 50 "make-up" contributions (up to $6,500 in 2020).

Health Insurance. One of our best retirement benefits is the ability to retain Federal Employees Health Benefits coverage as a retiree. And the government continues to pay its majority share of the premium, just as it does while you are employed.

Reality Check

How much money will you need to retire comfortably? Experts say that most people can continue their current lifestyles into retirement on 85 percent of their pre-retirement gross income. One reason for that reduced need is that deductions for Social Security, Medicare, TSP and FSPS contributions can consume at least 15 percent of pre-retirement gross income. Those deductions end at retirement, thereby reducing the drop in "take home" income. Of course, your retirement income needs may be higher or lower, depending on your desired retirement lifestyle and continuing financial commitments, such as children's college expenses.

You can judge your financial trajectory for retirement by estimating your annuity, Social Security and TSP income as of a target retirement date. State Department employees can estimate their annuity and annuity supplement using the Employee Retirement Portal on Open Net. Anyone can estimate their Social Security payments by registering for a My Social Security account on www.ssa.gov. And the TSP website at www.tsp.gov has calculators that generate estimates of your TSP account growth and post-retirement withdrawals under different scenarios.

Unfortunately, there are several "known unknowns" that could disrupt our retirement plans. First, in our up-or-out personnel system, retirement can be forced on us before we want it, reducing both our lifetime earnings and our pension. Promotion rates could slow, or your assignment pattern could be viewed by selection boards as being less competitive than your peers. So as you enter the middle years of your career, think carefully about decisions that might affect your career longevity—for example, when to open your six-year promotion window to the senior ranks if you are a Foreign Service officer.

Also out of our control is the stock market. A market plunge a few years before or after retirement subjects us to something called sequencing risk. For example, someone who retired in December 2008 with $500,000 in the C Fund and then withdrew 4 percent a year would have had a balance five years later of approximately $735,000. But if the same person retired in December 2007 and then withdrew 4 percent a year, they would have a balance five years later of just $405,000. The difference is that, in the second scenario, the retiree's retirement savings were hit by the 2008 stock market crash. So carefully consider your TSP withdrawal strategy, especially during your first years of retirement.

Finally, Congress could cut federal

Foreign Service Pre-Retirement Checklist

- **Beneficiary designations:** Ensure they are up-to-date: DS-5002 (FS retirement benefit), SF-1152 (unpaid compensation), SF-2823 (FEGLI), and TSP-3 (TSP). Reference: ALDAC 19 State 35376 of April 9, 2019 "Retirement Planning One Year Out"
- **Retirement planning seminars:** Take RV105 (2-day, mid-career), RV101 (4-day, late career), RV103 (1-day, finances/estates), RV104 (1-day, annuity/TSP/Social Security/Medicare). Reference: FSI intranet
- **Understand your benefits:** Pension, annuity supplement, Social Security, TSP, FEHB. References: ALDAC 19 State 35376 of April 9, 2019 "Retirement Planning One Year Out"; FSI seminars, Employee Retirement Portal online seminars (State), HR/RET counselor
- **FEHB health and FEGLI life insurance:** Maintain coverage during last five years of service. Reference: ALDAC 15 State 35130 of April 1, 2015 "Retirement Planning Five Years Out"
- **Retirement eligibility:** Confirm your retirement Service Computation Date. Reference: ALDAC 17 State 100146 of Sept 30, 2017 "Retirement Planning and EBIS"
- **Prior service (if applicable):** Buy back military/other service; deposits/redeposits. Reference: ALDAC 15 State 44466 of April 20, 2015 "Retirement Credit for Prior Service"
- **Divorce decree (if applicable):** Have divorce documentation reviewed. References: ALDAC 14 State 126786 of Oct 28, 2014 "Divorce and FS Retirement Benefits"; ALDAC 19 State 35376 of April 9, 2019 "Retirement Planning One Year Out"
- **TSP:** Ensure your portfolio meets your long-term needs and risk tolerance. References: www.tsp.gov under "Planning & Tools", ERP online seminars (State)
- **Long-term care insurance:** Consider getting it. References: www.ltcfeds.com, FSI retirement planning seminars
- **Social Security:** Understand pros and cons of various starting ages between 62 and 70. References: www.ssa.gov, FSI retirement planning seminars, ERP online seminars (State)
- **Medicare Part B:** Understand pros and cons of getting it at age 65. Reference: "AFSA Presents: The Coordination of FEHB and Medicare 2018" on YouTube
- **Survivor benefits:** Understand options and deadlines. Reference: FSI retirement planning seminars
- **FEGLI:** Understand post-retirement options and costs. Reference: FSI retirement planning seminars, ERP online seminars (State)
- **AFSA:** Review retiree resources on AFSA website; sign up for AFSA retiree membership. References: www.afsa.org/retirement-services and www.afsa.org/retired-membership

—John K. Naland

retirement benefits. While it seems unlikely that they would cut the pensions of current retirees or of employees nearing retirement, Congress could reduce the government's share of health insurance premiums. Or they could increase income tax rates, thereby reducing our net income after pension, Social Security and TSP payments. So, at retirement, please maintain your AFSA membership to support the association's efforts to protect your hard-earned Foreign Service retirement benefits from potential future cuts.

If reality does interfere with your retirement plans, you may need to adjust. For example, deciding not to retire at your first eligibility will increase your annuity by raising the multiplication factor for years of service and the "high three" average salary. Post-retirement employment is an option exercised by many FS retirees, including as a Re-Employed Annuitant (REA, formally known as WAE). Other options are to invest more of your take-home pay in the stock market, rental property or an Individual Retirement Account.

Feathering Your Nest

As you plan your future finances, there are several things to keep in mind to best position yourself for retirement:

Risk vs. Reward. How you manage your TSP savings will have a major effect on your retirement finances. Because many current employees will need to draw on their TSP savings 30, 40 or even 50 years from now, most experts recommend investing in funds with relatively high average rates of return (the C, S, I and the long-range L funds) to increase the chances that your TSP savings will be around as long as you are. Conversely, keeping all your money in bond funds (the G and F funds) may not generate gains in the coming decades that outpace inflation.

Save, Save, Save. While saving for retirement is vital, doing so can be difficult depending on your cash flow situation. Most experts endorse the tactic of "pay yourself first": sign up for a large TSP payroll deduction so those funds never enter your take-home pay for discretionary spending. If you receive a hardship differential or an inheritance, consider investing a chunk of it in retirement savings.

Location, Location, Location. Where you retire can affect your net income. The Internal Revenue Service taxes annuity payments, TSP withdrawals and Social Security, but some states do not. Thus, retiring to certain states can raise your after-tax income. For a state-by-state analysis, see the AFSA Tax Guide published each year in the January/February edition of *The Foreign Service Journal* and posted at www.afsa.org/fsj.

Take Charge of your Retirement

With luck, you will spend longer in retirement than you spent in your working career. To prepare for that crucial transition, do your homework by reviewing online guidance, such as the Office of Retirement's website at https://RNet.state.gov. Pay special attention to steps to take between one and five years before retirement to make your final retirement processing go smoothly. These include "buying back" any prior federal civilian or military service to increase your FSPS pension, and sending the Office of Retirement your divorce documentation (if applicable) to determine how it affects the division of your pension.

During your career, find time to take the Foreign Service Institute's excellent retirement planning courses: the two-day Early/Mid-Career Retirement Planning Seminar (RV105) when you are more than 10 years from retirement eligibility, and the four-day Retirement Planning Seminar (RV101) within 10 years of retirement. At retirement, take the two-month Job Search/Transition Program (RV102).

By your mid-50s, seriously evaluate whether to apply for long-term care insurance. Entering your 60s, think about when you want to apply for Social Security benefits, and learn about the pros and cons of signing up for Medicare Part B at age 65.

Throughout your working and retired years keep your beneficiary designations updated for life insurance, TSP and pension. Obtain estate planning documents such as a will, trust, power of attorney and/or medical directive, and consider getting them updated if you move to a different state. From time to time, review the risk-versus-reward balance in your TSP fund allocations to make sure that it is still appropriate to your specific situation.

At retirement, maintain your AFSA membership by submitting an SF-1187a to AFSA. Even if you have been a member for decades while on active duty, you must sign up again as an annuitant to continue to support AFSA as it champions the career Foreign Service, advocates for funding for diplomacy and development, and lobbies to maintain your earned retirement benefits.

Live Long and Prosper

This article has focused on the financial aspects of retirement because that is what most pre-retirees consider to be the key to a happy retirement. Interestingly, surveys of current retirees show that they consider health to be the most important factor. After all, having lots of money can only do so much for someone who is in chronically poor health. Therefore, a vital component of retirement preparations should be to take care of your health. Obviously, little can be done about genetics or bad luck with accidents and diseases, but steps such as maintaining a healthy weight, eating well, keeping fit and not smoking are certainly beneficial.

Here's wishing you a happy retirement. ■

John K. Naland served in the Foreign Service for 29 years, including as director of the Office of Retirement. He twice served as AFSA president. He is currently AFSA Retiree Vice President and president of the Foreign Service Youth Foundation (covering both ends of the age spectrum).

AFSA Membership in Retirement

What's in It for You?

Besides camaraderie, there are paths to engagement and advocacy, access to unique practical information and assistance—and it's a good deal!

BY DOLORES BROWN

I knew when I retired in 2018 that I wanted to stay in touch with my profession. For the camaraderie alone, I didn't think twice about re-upping my AFSA membership. But I found there is a lot more to be gained than professional ties.

I am now your retirement benefits counselor, so am unabashedly writing from an insider's perch. But I'm also still far enough into my first years as a retiree to look dispassionately at the reasons to remain in AFSA. Perhaps it's best to start by relaying to you what we've been working on lately, all of which came about with input from you.

We heard, for example, from recent retirees embarking on teaching careers about what a heavy lift it is to put together new curricula. In response, AFSA established a Teaching Diplomacy (and associated topics) page (afsa.org/teaching-diplomacy), which is a sharing space for teaching resources. And we hosted a networking event for practitioners and aspirants to meet, and a panel featuring your colleagues who have made a successful transition to teaching. Why should our members start from scratch when such a rich brain trust exists?

This idea morphed into a broad AFSA programmatic series, "Next Stage," which focuses on follow-on careers for the Foreign Service. Besides the panel on teaching, AFSA sponsored events on careers in private industry, writing and security—all featuring your peers offering invaluable insights into how to make the transition from government.

On another note, after receiving many calls requesting information on basic retirement issues, we realized we could fill the gap for members who have lost access to their agencies' intranets by broadening AFSA's online retirement services to include a one-stop shop

Reopening Windows, Providing Opportunities

When I left the Foreign Service to move to a farm in rural Maine, I canceled my AFSA membership. Life has a way of changing plans, and when I resumed my AFSA membership I found that it reopened windows into a valued community of friends and former colleagues. Writing has been a part of my life, and AFSA provides opportunities for authors to showcase their own work and to learn about the work of others.

—Louis Sell, Maine

I Look Forward to the Daily News Briefs

I have found the daily news briefs from AFSA something I look forward to reading every day. The issues continue to interest me and the compilation of news about the administration, and State in particular, from a variety of sources is very well presented. I appreciate the services AFSA offers to retirees to assist with general and individual questions concerning benefits such as health insurance. Knowing we have someone to reach out to who understands these things is a huge relief.

—Barbara Simpson, Florida

(afsa.org/retirement-services). The page includes ALDACs from State on retirement issues and other basic information. We also redesigned the annual Directory of Retired Members to include a front section with answers to the "top hits" among questions we receive, so this information will now be at your fingertips.

And if all else fails, you can always call AFSA when you run into a systemic problem or need individualized assistance: this is the heart of AFSA's retirement services. Over recent months, for instance, AFSA heard from members recounting their difficulty in escorting family members into the service areas at the Department of State, something they had been able to do for at least the last 20 years. AFSA brought this to Diplomatic Security, which quickly confirmed the policy and instructed its guards accordingly. We also regularly help those who run into difficulty getting timely answers to complex retirement issues, and we often provide support to the families of deceased FS members who don't know who to call about annuity and life insurance issues.

To give you a sense of the full scope of our activities, here is a quick rundown of other benefits:

• AFSA helps you to stay plugged into your unique past, profession and pals. *The Foreign Service Journal* and the Daily Media Digest are two curated tools to keep you abreast of FS news. AFSA also keeps members plugged into 18 local associations where you can meet with your colleagues. Finally, you can attend events virtually through videos or at AFSA headquarters, including a host of events around Foreign Service Day.

• AFSA helps you stay engaged and advocating. You, too, are the Voice of the Foreign Service. You can join AFSA's Speakers Bureau or do local outreach to amplify the story of the Foreign Service in your community, and AFSA will arm you with up-to-date talking points, short explainer videos and other material. Remaining in AFSA also supports AFSA's advocacy on the Hill to support the Foreign Service and protect our earned benefits.

• AFSA helps you stay smart. Our Federal Benefits series, for example, is particularly helpful because many financial advisers beyond the Beltway are not familiar with federal benefits, much less those applicable to the Foreign Service. And in addition to the one-stop shop, AFSA's bimonthly Retirement Newsletter rounds out AFSA's special offerings.

• And, AFSA's a great deal: Depending on the grade at which you retire, your AFSA dues will decrease by around one-third to one-half. ■

Dolores Brown, a retired FSO, is AFSA's retirement benefits counselor.

Life after the Foreign Service

The Theater and Policy Salon

BY MICHAEL FELDMAN

While getting ready to retire from the Foreign Service, I came to realize that I wanted to make my long-term avocation—theater and the arts—into my vocation while continuing my policy work as a supporting element. The "profit center" part of my post–Foreign Service work involves providing strategic partnership and cultural diplomacy advice to local arts organizations and foreign cultural institutions through my company Transitions International. The "cost center" part of my post-FS work—what is euphemistically termed a passion project—is dedicated to advancing policy through theater.


VISUAL ARTIST THOM GOERTEL

The author moderates a salon discussion of "People Respect Me Now," directed by Paula Stenström Öhman, at the Woolly Mammoth Theatre Company.

In 2018 I co-founded the Theater and Policy Salon, which works with D.C.-area theaters to curate policy conversations around several plays during a full theater season. Amplifying the messages coming from the stage, we seek to inspire individual action on real-world issues by pinpointing pragmatic, nonpartisan policy responses. The salon pairs socially conscious plays with policy conversations with experts and practitioners. In addition, I develop policy-related programming as part of Mosaic Theater Company's Public Programming Committee.

NJ MITCHELL, THEATER AND POLICY SALON

Panelists from the Delegation of the European Union to the United States, National Association for the Advancement of Colored People Legal Defense Fund and Human Rights Watch in front of the set of "Twelve Angry Men" at Ford's Theatre in early 2019. Set design by Stephanie Kerley Schwartz.

Staying connected to our broader community of diplomats led directly to the launch of the salon. Thanks to the encouragement, advice and support of the Swedish cultural counselor, herself a practicing theater director, the salon launched its "Who Gets to Feel Safe?" season in July 2018 at Woolly Mammoth Theatre Company with a play reading and panel discussion featuring a Swedish playwright.

During the rest of the 2018-2019 season, we partnered with Ford's Theatre, Mosaic Theater Company, the Delegation of the European Union to the United States and the New York University Washington, D.C., campus to host dialogues on inequality and criminal justice, as well as the role of story, music and culture in resilience.

Making this transformation happen required mapping my Foreign Service skills and Washington policymaking experience onto the U.S. domestic theater and arts sector. Working at an arts policy think-tank, Createquity, allowed me to use the analytical, drafting and quantitative chops from the Foreign Service—on top of the more obvious public diplomacy skills—to publish and speak on arts policy issues.

Finding common ground with practitioners in the arts world served as another point of entry. I connected with the Forum Theatre's community engagement coordinator over a shared background in global development in 2016. Our shared experience in foreign policy and American arts policy enabled me to design and launch the Talk Tank series to explore policy issues underpinning Forum's productions.

The Talk Tank program served as a beta version of Theater and Policy Salon. I partnered on policy discussions with the Center for American Progress, the Brookings Institution, the NAACP Legal Defense Fund, the American Friends Service Committee and the Jamestown Foundation, along with local experts including a local police executive in charge of recruitment and doctrine.

In fact, successfully transitioning to both the arts and policy practice and my Transitions International work paralleled the familiar Foreign Service experience of arriving at a new post and establishing oneself as an effective interlocutor and influential voice.

In my new role, I set about establishing my profile and building my networks in the arts policy and theater world in Washington following retirement. In addition to working a lot of rooms, I published articles, spoke at symposia and nurtured my social media presence (follow me @artsconnectedDC).

Our 2019-2020 Theater and Policy Salon season is focused on two themes: resilience in struggling U.S. communities, and migrants and refugees. The first

In fact, successfully transitioning to both the arts and policy practice and my Transitions International work paralleled the familiar Foreign Service experience of arriving at a new post …

fall salon looked at resilience, in partnership with NYU Washington, Shakespeare Theatre Company and Ford's Theatre. We continued with a salon at Studio Theatre on migration issues centered on a Thai-Australian playwright's work, in partnership with the Australian embassy.

In early 2020 we held discussions hosted by Theater J, Mosaic Theater Company and Studio Theatre. And this spring we are partnering with the Mexican Cultural Institute and NYU Washington to focus on Arena Stage and the InSeries productions dealing with migration and resilience.

One benchmark of success came when one of my arts and theater collaborators playfully accused me of "being everywhere and knowing everyone." Future retirees should know that building a network and reputation when representing only oneself will be both harder, and potentially more satisfying, than making contacts while serving as a U.S. government representative abroad. ■

Michael Feldman is principal at Transitions International and the co-founder of the Theater and Policy Salon in Washington, D.C. A retired FSO, he served in Italy, the Czech Republic, the Democratic Republic of the Congo and Germany, along with assignments at the Office of the U.S. Trade Representative, the U.S. Senate, the Office of the U.S. Global AIDS Coordinator and the State Department.

The Inn by the Lake

BY DAVID SUMMERS

Soon after my retirement, my family was mystified when I declared my intent to buy a bed-and-breakfast in a far corner of Idaho. They still remembered my adverse reaction to our one-and-only stay at a bed-and-breakfast farmhouse in Pennsylvania Dutch country where I declined, on behalf of all of us, the invitation to rise before dawn and watch cows being milked. That had been much of my Kentucky childhood, which had then fueled my ambition to join the Foreign Service.

Despite the gentle remonstrations of those dear to me ("But Bea, they have rocking chairs on the front porch, and when we're old, we can have our whole family around us." "David, there are rocking chairs on our front porch now, and our whole family is around us."), I soon became the owner of the Old Northern Inn on Priest Lake.

The six-room hostelry had been built in 1900 from

COURTESY OF DAVID SUMMERS

David Summers at the entrance to the inn.

COURTESY OF DAVID SUMMERS

The view of the deck and Priest Lake from the upstairs balcony of the Old Northern Inn.

rough-hewn logs by a guy who mistakenly thought a railroad was coming. A history of the lake reveals that he soon went bankrupt, and over time the building transitioned to a brothel, an old folks' home, a liquor store, a Mexican restaurant, an empty hulk and, finally, a bed-and-breakfast.

I had stumbled on Priest Lake in 2003, at the start of a summer camping trip to the three states I had never visited—Idaho, Montana and North Dakota. With no particular plan, my son and I pitched our tent there on a deserted island where by day, the water was so clear that paddling a canoe felt like flying and by night, stars spangled the ponderosa pines like Christmas lights.

That experience stayed with me, and after returning home, I telephoned a realtor to ask about buying a little cabin on the lake. I learned that the little cabins were leased by the state, and that the only lakefront place for sale was the bed-

The timeless beauty of Priest Lake has brought me back again and again. I hadn't given much thought to the hospitality business, but it soon became as important a pull as the place itself.

and-breakfast. I calculated that we could afford that with the income generated by the inn.

I decided to "follow my bliss," as Joseph Campbell summed things up in a 1985 interview with Bill Moyers. Every year when it's time to return to open for the season, I anticipate how the air will taste when I step out of the car. Every year it is sweeter and fresher than I imagined. Sometimes, a hummingbird will appear, as if to say, "Where have you been? The feeders aren't up yet."

The timeless beauty of Priest Lake has brought me back again and again. I hadn't given much thought to the hospitality business, but it soon became as important a pull as the place itself. The guests turned out to be engaging and enlightening.

For instance, on our opening night we sat by the fire until midnight chatting about Bangkok. We had lived there in the 1980s, and coincidentally, our guest had been a Navy wife there in the 1960s. When we finally went to bed, my wife threw her head against the pillows and exclaimed, "I never thought I'd be doing this!"

"Bea, it's just like having company. It's like having our family over."

"Yes," she answered, "but the guests are more polite."

I also didn't expect how much the little community of Coolin, Idaho, would come to mean to me. Every Memorial Day, the members of the Coolin Civic Association pull together the Spring Festival featuring a parade, bake sale, crafts fair and quilt show.

Every September, a potluck supper is held at the Old Northern Inn. Neighbors

COURTESY OF DAVID SUMMERS

A family reunion at Priest Lake. Back row: David Summers and Beatrice Camp. Front row (from left to right): Son Daniel with his wife, Ana; son Will with his wife, Megan, and their son, Charlie.

keep an eye out for the Old Northern Inn when it is closed for the winter, deciding when snow needs to be shoveled from the roof and noting when there are new footprints in the snow.

Running the inn turned out to be more work than I thought. Managing reservations, meals, staff and repairs is a continuous and overlapping responsibility, causing one workday to blend into the next.

We had an accurate picture that we could cover these operating expenses with the revenue from running the inn, but we made a mistaken assumption that the property value would appreciate the way real estate has inside the Beltway. We won't realize a windfall when we sell the place.

But that was never the main point: our whole family did gather on the front porch with the rocking chairs. It happened, with the arrival of our newest family member, a grandson. And the Navy wife who had lived in Bangkok? A new friend, she made a quilt for that baby.

David Summers was born in Kentucky in 1949. He joined the Foreign Service after college, and had overseas postings to Krakow, Warsaw, Beijing, Bangkok, Stockholm and Budapest. He took a leave of absence from 1979 to 1981 to direct the Thomas J. Watson Foundation. After retirement in 1999, he accompanied his wife, FSO Beatrice Camp, to her postings in Chiang Mai and Shanghai. David and Bea have two married sons and a grandson.

RETIREMENT SUPPLEMENT

Try the Smaller Pond

BY JANICE WEINER

Do I miss the Foreign Service? Yes. Is there life after the Foreign Service? Unequivocally. It is whatever you choose it to be, because we all have an incredible stockpile of transferable skills.

I moved back almost five years ago to where I grew up—Iowa City, Iowa. It's a university town with all the amenities that a large city brings, but on a much smaller scale. I can get anywhere in 10-15 minutes. Really. The cost of living is lower, and I got a lot more house for my money.

Why did I move back to what many consider "flyover country"? First, to make sure my younger daughter made it through high school, which I was pretty certain would not have happened in Fairfax County. It did here, thanks to teachers and counselors and family friends—and her own efforts. For that alone, it was worth the move back.

What do I do with my time? For one, I'm on the board of my synagogue and on the program committee of our local foreign relations council.

I've been on the board of Shelter House, a nongovernmental organization that helps those experiencing homelessness, and so much more. In fact, one year ago, we opened the first permanent supportive housing complex in the state; it now houses 24 persons who otherwise would never have been housed.

We are on the front lines of rapid rehousing, an approach where we quickly create the stability needed for a person to be able to move on with other aspects of his or her life.

COURTESY OF JANICE WEINER

COURTESY OF JANICE WEINER

Right: Running a 525-person precinct caucus in a high school gym, Feb. 3, 2020. Above: Happy graduate and mom, May 2018.

COURTESY OF TOM JACOBS

The author marches with county Democrats in a Fourth of July parade in Coralville, Iowa, with granddaughter on back.

We're participating in a new joint county-cities venture, an access center where those in the midst of a mental health crisis or needing help with addiction can go to keep themselves out of jails and hospital ERs. It will help people and save tax dollars.

I stepped down from the Shelter House board in December, just before being sworn in as a member of the Iowa City City Council, part of the first-ever female-majority council (five out of seven).

I'm also on the county, district and state boards for the Democratic Party. In February, I ran a 525-person precinct caucus.

And, oh yes, I am now the legal guardian of my 2-year-old granddaughter, who has already met more presidential candidates than most Americans ever will. And I had their ear when I needed to push sensible foreign policy, as well as mental health and addiction policies.

Try being a bigger fish in a smaller pond. You can really make an impact. ■

Janice Weiner served in the Foreign Service from 1987 to 2013, in East Berlin, Brussels, Ankara (twice), Warsaw, Toronto, Mexico City and Düsseldorf, as well as in Washington, D.C. She now lives in Iowa City, Iowa.

Diplomats Aid in Solving the Crime

Ghosts of Sheridan Circle: How a Washington Assassination Brought Pinochet's Terror State to Justice
Alan McPherson, University of North Carolina Press, 2019, $34.95/hardcover, $26.99/Kindle, 392 pages.

Reviewed by Harry Kopp

"Justice delayed," say the lawyers, "is justice denied." Theologians have a different view: "The arc of the moral universe is long, but it bends toward justice." Georgetown Professor Charles King writes, "American history does not so much arc toward justice as oscillate in its general vicinity."

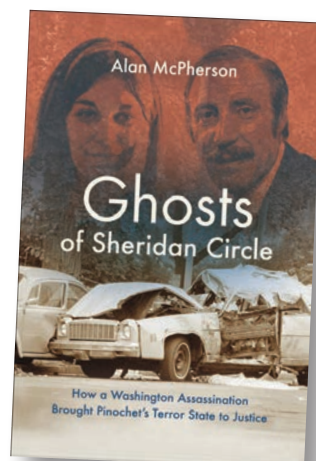
Justice, and the many obstacles to its attainment, is the unstated theme of Alan McPherson's *Ghosts of Sheridan Circle*, a history of a great political crime and its aftermath. The crime, described in horrifying detail, is the 1976 assassination in Washington, D.C., of Orlando Letelier, blown apart by a bomb planted in his car as he drove to work. An aide, Ronni Moffitt, also died in the attack.

At the time, Letelier was an employee of the Institute for Policy Studies, a left-wing foreign-affairs think-tank with offices on Dupont Circle. He had been a supporter of Salvador Allende, the Marxist president of Chile elected in 1970 and ousted three years later in a military coup.

Letelier had met Allende, then a senator, during his university days in the early 1950s: It was acolyte and guru at first sight. When Allende squeaked into the presidency (with 37 percent of the vote, in a three-way race), he made Letelier, already established in Washington as an official at the Inter-American Development Bank, ambassador to the United States. Letelier was well suited to the job.

As Allende's grip on power weakened, however, he called Letelier home to serve in the Cabinet. At the time of the coup, Letelier was Chile's minister of defense, a post he had held for less than three weeks. He was arrested at the ministry by his nominal subordinate, General Augusto Pinochet, who led the coup and would rule Chile for the next 17 years.

Pinochet had Letelier imprisoned, then exiled, then stripped of his citizenship and killed. Proof of the general's role in the murder took a quarter-century to establish.



The U.S. government harbored deep hostility toward Salvador Allende and relished his overthrow. Letelier was Allende's most prominent supporter, and had his killing occurred in Santiago, or Caracas, or even Amsterdam—all cities Letelier knew well—U.S. authorities would have paid little notice.

But his assassination in Washington, D.C., was a federal crime, an affront to U.S. sovereignty that set the gears of American justice into motion. The Federal Bureau of Investigation and the office of the U.S. Attorney for the District of Columbia took up the case, with help from the embassy in Santiago. The White House offered no encouragement but did not interfere.

The assassins were a group assembled by Chile's National Intelligence Directorate (known by its Spanish acronym, DINA) that included Chilean army officers, U.S.-resident members of the anti-Castro Cuban National Movement and Michael Townley, an American citizen resident in Chile, who built the bomb.

In classic fashion, luck and a tip led investigators to Townley, who took a plea bargain with witness protection and flipped on his co-conspirators. Townley's testimony was the break the FBI needed.

The government of Chile threw up legal obstacles and diplomatic resistance to block investigators at every turn, but Letelier's widow, Isabel, was a constant, emotionally powerful force that kept the case alive in both countries.

Important as she was, however, the major share of the credit for the eventual indictments, arrests and convictions must go to nonpolitical, midlevel American government employees—the prosecutors, special agents and diplomats who persevered, did their jobs, solved the crime and held the perpetrators to account.

To tell this story, Alan McPherson, director of the Center for the Study of Force and Diplomacy at Temple University, has tempered the dry precision of academic history with stylistic elements borrowed from the true-crime genre: nonfiction storytelling that generates horror, sympathy and suspense.

He offers psychological portraits of many of the key figures in the story, based on American and Chilean documents on the record or brought into the public domain through the Freedom of Information Act, including FBI transcripts, court proceedings, oral histories and his own interviews.

The major share of the credit for the eventual indictments, arrests and convictions must go to nonpolitical, midlevel American government employees—the prosecutors, special agents and diplomats who persevered, did their jobs, solved the crime and held the perpetrators to account.

He takes the reader through legal and diplomatic battles over letters rogatory, extraditions, Chile's amnesty law, the U.S. Foreign Sovereign Immunities Act, the testimony of false or unreliable witnesses, and the constant looming challenge of statutes of limitation. And as in any crime story, sudden breakthroughs time and again run up against new barricades.

The investigatory and legal dramas of the case played out against the backdrop of Chilean politics. With the end of Pinochet's dictatorship in 1990, the conditions for closure seemed to arrive at last—but even then, the mills of God ground slowly.

In 1992 the United States and Chile used provisions of a 1914 bilateral treaty to negotiate a financial award, payable to the families of Orlando Letelier and Ronni Moffitt. Despite Chile's amnesty law, enacted in 1978 to protect military personnel from civilian prosecution, Chilean courts tried and convicted members of DINA, including its leader, General Manuel Contreras, whose last appeal was denied in 1995. (When Contreras died in 2015, he was serving 28 sentences totaling more than 300 years.)

Pinochet himself was indicted in 2000 on 177 counts of torture, murder and other crimes. He died in a military hospital in 2006, 30 years after the death of Letelier, without a verdict having been rendered. He was 91 years old.

McPherson offers some thoughts about the legacy of the Letelier affair. In Chile, the case strengthened the judiciary, contributed to the end of the Pinochet regime and broke the impunity conferred by the amnesty law.

In the United States, it raised counterterrorism to an area of special interest and expertise in the FBI, and led to new judicial powers to act against international terrorism, including through civil as well as criminal actions.

In diplomacy, said Chilean Ambassador Juan Gabriel Valdés, the case elevated human rights to "an area of international politics that you had to take into consideration, [one] not to be taken lightly."

McPherson concludes that the Letelier case "provided hope that ordinary people—survivors of terror, mourning family members, investigators, lawyers, diplomats and their allies in nongovernmental organizations—could obtain justice against tyrants and terrorists even when their own governments were less than forthcoming."

Did justice at last prevail? Metaphysical questions have no clear answers, but this statement comes pretty close to an unhedged yes.

Former Foreign Service Officer Harry Kopp is a frequent contributor to The Foreign Service Journal *and a member of its editorial board.*

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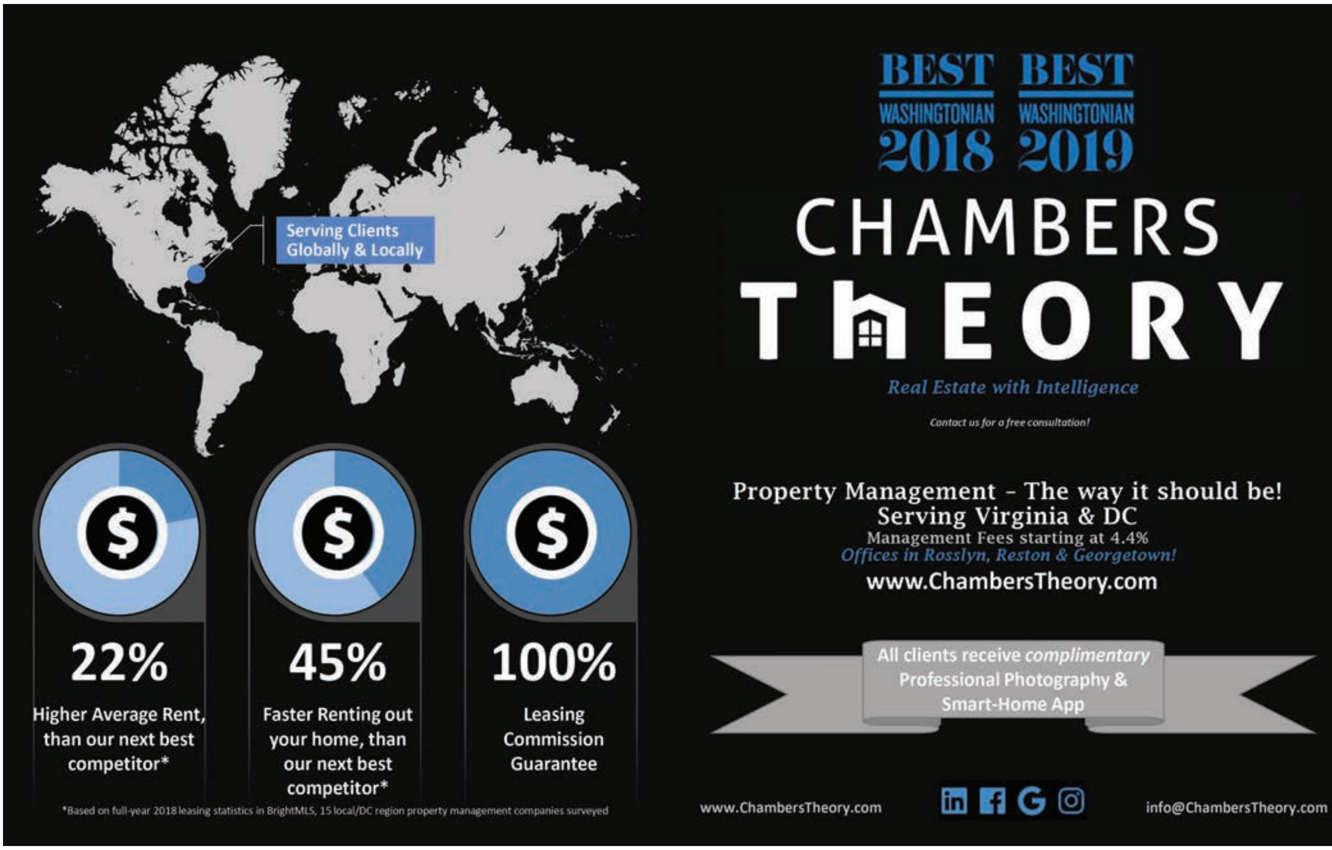

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On the Road from Sibiu

BY JONATHAN B. RICKERT

In 1974 my wife, Gerd, and I were stationed at the U.S. embassy in Bucharest. After having spent the Christmas holidays out of the country, we found ourselves headed "home" in our Volvo, driving on a two-lane rural road about 25 kilometers south of Sibiu, Romania.

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As we arrived midday in the vicinity of a small settlement called Riu Vadului, the car's engine began to overheat terribly. Being very unmechanical, I stopped the car, raised the hood and stood there scratching my head. How were we going to get our vehicle fixed and get ourselves back to Bucharest from this mountainous wilderness?

After a short while, a young man in work clothes happened by and asked what the problem was. Fortunately, we were fluent in Romanian—thanks to Mr. Chiacu and FSI. So when he asked what the problem was, I immediately replied, "*Nu stiu*" (I don't know). He smiled, and then offered to take a look. He quickly discovered that the fan had come loose and had punched a hole in the radiator, causing the coolant to drain out and the engine to overheat.

What can we do, I asked, to get the car going again?

The young man replied that a tractor repair station associated with the area's forest industry was just up the road, and he was sure that the mechanics there could help. We slowly drove with him to the station, where the people he spoke with immediately agreed to undertake the necessary repairs.

For the next few hours, the mechanics dropped everything to attend to our Volvo. They not only patched the hole in the radiator, but also reconstructed the badly damaged fan. By late afternoon, the car was back in working order.

We were immensely grateful. Unfortunately, we had no Romanian currency with us (it was illegal to take lei into or out of the country), and paying them in dollars was not permitted. Although our benefactors insisted on no payment of any kind, we gave them some cigarettes (which served as a sort of alternative currency in Romania in those days) and Austrian cookies that we happened to have with us in the car.

Also, it being Saturday, the end of the six-day work week, we offered a ride to anyone who needed to travel to the south. It turned out many forest workers and mechanics spent the week at the job site and returned to their villages only for their free day, Sunday. Two of the men gratefully accepted our offer.

Driving southward, we had interesting conversations with our passengers about their working conditions, village life and the like.

I recall asking how hitchhiking functioned in Romania (we often saw people waiting at the side of the road, moving one hand up and down as they looked for rides). They explained that everyone knew how much it cost to travel by public transportation (usually a bus), and hitchhikers were expected to pay that amount to anyone who gave them a lift.

When we were about to let them off at their village, our passengers reached for their wallets. Surprised, we said that no payment was necessary, that we were happy to give them a ride. They apparently thought that I had asked about hitchhiking to discover how much to get paid, while in fact I had been motivated by simple curiosity. Expressing their thanks, they happily put their wallets away and trudged off to their homes.

At that time, remember, of course, Romania was a communist country and Warsaw Pact member. This experience only typified, however, the extraordinary kindness and generosity ordinary Romanians showed us during our stay in their country—as well as the benefits of fluency in their language. ■

Retired Senior Foreign Service Officer Jonathan B. Rickert spent the majority of his 35-year career in or dealing with Central and Eastern Europe. His final two overseas posts were as deputy chief of mission in Sofia and then Bucharest. A native of Washington, D.C., he still resides in the district.

BY KEVIN KEEN ■ CESSY, FRANCE

One weekend every five to six years, the public can visit the underground laboratories and particle accelerators at the European Organization for Nuclear Research (CERN), near Geneva, Switzerland (where, among other things, the World Wide Web was born in 1989). At CERN, physicists and engineers use massive and sophisticated scientific instruments to study matter. In September 2019, I jumped at the chance to tour parts of the deep underground installations. Shown here is a view of the Compact Muon Solenoid experiment, dedicated to the search for extra dimensions and particles that could make up dark matter. ■

Kevin Keen is a Foreign Service spouse with the Department of State. He's lived in Argentina, Ecuador and Switzerland. Mongolia is his family's current posting. This photo was shot with a Canon EOS 80D.

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