

# The Federal Manager

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## PRESIDENT'S PAGE



*FMA National President  
Darryl Perkinson*

### FMA – On Solid Footing and Confidently Moving Ahead

A few blocks away from the site of FMA's 17th Mid-Year Conference in Philadelphia, the founding fathers formulated the guiding principles for our great country. As managers in the agencies that serve our citizens, we are in many ways the guardians of the ingrained principles and philosophies created by those who designed our government. Day in and day out, we go to our respective agencies and perform our assigned tasks without fanfare or recognition. It is this dedication to serving the public good that establishes federal managers as the government's

most valuable asset. Your passion serves as the lifeline of our national presence through the work of the Federal Managers Association.

In Philadelphia, we discussed how we could help FMA grow and exchanged ideas to better advance our organization. We reached a consensus that the issue of recruitment deserved our greatest attention. We are presently able to positively influence government policy and our ability to engage agency leadership in discussions is tremendous. There is room to grow, however, and expanding FMA membership will increase our effectiveness exponentially. Building on our recruitment discussion, we will ask for your opinions on your vision of FMA's future. We have commissioned a committee consisting of three Board members to seek feedback on how you envision the organization progressing in the years ahead. When you receive this survey, please participate and share your ideas with us.

We in the federal workforce are on the verge of another period of hardship due to the challenges presented by a new Administration as it transitions into power. Fortunately, we are well positioned to adapt to the changes due to our non-partisan approach, enabling us to engage with those elected in November. We must deal with the difficulties associated with the ongoing use of continuing resolutions, as the Congress has unfortunately chosen to use this stifling process to fund the government through this transition period. Despite the difficulties presented, I am certain we will succeed in getting the work done as we have time and time again overcome such obstacles.

Exciting happenings continue for FMA members as we promote our "FMA Advantages" program of discounts from over 600 merchants. Additionally, I have been invited to participate as a contributor to a Website seeking to reach out to those interested in federal issues and government projects. Visit [www.meritalk.com](http://www.meritalk.com) and please review the array of contributors. You will notice that I am a regular contributor on the site, and I ask you to please read my articles and offer feedback. I would also welcome your ideas for topics or opinions you would like to see discussed. Another site of interest that you should visit is [www.govloop.com](http://www.govloop.com), designed to present forums and blogs on a variety of topics associated with government.

Our emphasis on recruitment and membership complements our goal of gaining greater influence in the halls of Congress and in our agencies, as more voices promoting our agenda leads to greater action. Our presence in the process today is tremendous. On a regular basis we are quoted in the multitude of publications that cover government. Our recent success working with Congressman Moran, (D-Va.) and the Government Managers Coalition on the FERS sick leave credit legislation is another example of the power of our work.

In 2013, we will be celebrating the Federal Managers Association's 100th Anniversary. It is our responsibility to expand our ranks and continue our work in promoting excellence in public service according to the goals established by the founders of this great Association back in 1913. ■

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All materials submitted to *The Federal Manager* should pertain to public service managers. Copy should be double-spaced, no longer than 10 pages. Color photographs, 35 mm color slides, charts, or other illustrations should be included if possible. Text should be submitted on compact disc, labeled with type of software and name of file. Also include a biography of the author.

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# Ready...Set...Retire!

## Social Security Embraces Electronic Services to Cope with Rising Tide of Baby Boomer Retirements



By Kia S. Green

*At one second after midnight, on January 1, 1946, in a hospital in Philadelphia, Pennsylvania, Kathy Casey-Kirschling was born. What would later be known as the baby boom generation had begun. On October 15, 2007, just under 62 years later, Ms. Casey-Kirschling stood with Michael Astrue, Commissioner of Social Security, in a crowded room at the National Press Club as members of the media recorded for history, the nation's first baby boomer filing online at [www.socialsecurity.gov](http://www.socialsecurity.gov) for her Social Security retirement benefits. America's "silver tsunami" had begun hitting Social Security's retirement shores.*

With nearly 80 million of Ms. Casey-Kirschling's fellow baby boomers approaching retirement age, the Social Security Administration (SSA) is facing a tidal wave of retirement and disability claims. Combine this with new and non-traditional workloads recently given to the

agency by Congress, budget constraints and a workforce that is in the midst of its own retirement wave, and what emerges is one of the most difficult challenges the agency has ever faced.

On the job for less than a year at the time Ms. Casey-Kirschling filed, Social Security Commissioner Astrue already recognized the enormity of the workloads the agency would be handling in the coming decades. He challenged the agency's career workforce to revolutionize how the agency does business with a new initiative that has come to be called "Ready Retirement."

### CRITICAL WORKLOAD CHALLENGES

Social Security's programs touch nearly all Americans at some point in their lives –

whether it's to get a Social Security number, earn valuable protection through payroll contributions or to apply for retirement, disability, survivor benefits or Medicare. For the last seven decades, SSA has faithfully served millions of Americans and earned a well-deserved reputation as a "can do" agency. With more than 1200 field offices in communities all across the country, SSA is the "face of government."

This year, SSA will ensure that over 54 million beneficiaries and recipients receive their payments timely and accurately, issue nearly 18 million new and replacement Social Security cards and process over 265 million W-2 reports to credit earnings to the correct workers' records. The agency also will issue over 146 million Social Security Statements providing the American public with

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# Ready...Set...Retire!

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important information about their future Social Security benefits to help them plan for a secure retirement. Personnel in the agency's field offices will serve over 43 million visitors and representatives in its 35 teleservice centers and will handle almost 60 million calls to the agency's toll-free 800 number.

SSA also has faced nearly two decades of insufficient resources that jeopardizes the agency's ability to maintain its strong tradition of service. For 15 consecutive years, Congress appropriated less for the agency's administrative budget than the President had requested – a string that was finally broken just this fiscal year.

As Commissioner Astrue told the House Committee on Ways and Means at a hearing in April, "Our field offices do their best, but simply cannot provide the level of service the public expects from the Social Security Administration at recent levels of funding."

To cope with rising workloads and fiscal constraints, SSA has systematically reviewed the information requested from or provided to the public. "We believe that if we can automate, reduce or eliminate such information exchanges, we can improve efficiency as well as the quality of our service and the morale of our field employees," Astrue told the Committee. "Our Ready Retirement Team has been leading this effort."

## READY RETIREMENT

Michelle King, Deputy Associate Commissioner for the Office of Public Service and Operations Support and Sean Brune, formerly the Deputy Associate Commissioner for the Office of Electronic Services and now the Acting Associate Commissioner for Legislative Operations, were chosen by Commissioner Astrue to lead the "Ready Retirement" effort. King and Brune recognized that SSA had to act quickly to handle the millions of



*Michelle King, Deputy Associate Commissioner for the Office of Public Service and Operations Support and Sean Brune, Acting Associate Commissioner for Legislative Operations, discuss Ready Retirement.*

Americans becoming eligible for Social Security retirement benefits – 10,000 a day over the next two decades.

"We knew we needed to look at retirement as a whole, and think of ways to streamline our process," said Michelle King. "And from that, the concept of Ready Retirement was born."

"But the real goal was to improve the service we provide to the public," Sean Brune added. "The uptake for our original online retirement application was not that great. Through Ready Retirement we will make online claims a better service for the public."

The Ready Retirement initiative is comprised of three major "puzzle pieces": Public Education, a Simplified Retirement Application and Automated Adjudication. "It's a multifaceted approach that will take several years to implement," said King.

## PUBLIC EDUCATION

The foundation for Ready Retirement is public education. The Ready Retirement team recognized that SSA needed to greatly improve the information available to people trying to decide the right date for their retirement. To help meet this need, in July SSA unveiled a new online calculator at [www.socialsecurity.gov/estimator](http://www.socialsecurity.gov/estimator). The Retirement Estimator provides immediate and personalized retirement benefit estimates to help people plan for their retirement.

"Deciding when to retire is one of the most important and difficult decisions many people face," Commissioner Astrue said at the unveiling. "The Retirement Estimator greatly improves the information available when trying to

decide the right time to retire. It is simple, easy-to-use and will provide highly accurate benefit estimates for those nearing retirement age. For younger workers, it will provide valuable information to help them plan and save for their retirement.”

Why implement the Retirement Estimator when Social Security already had four benefit calculators on its Website? Other than a Quick Calculator that provided a simple and very rough estimate, the other calculators all required that the individual have access to his or her Social Security Statement in order to manually key each year of their lifetime earnings for use in the benefit computation. The agency knew through surveys conducted by the American Customer Satisfaction Index that less than 25 percent of people using these calculators had their Statement available.

Since the Retirement Estimator is tied to a person’s actual Social Security earnings record, it eliminates the need to manually key in years of earnings information.



*Michael Astrue, Commissioner of Social Security*

Equally as important, it saves the agency resources by reducing phone calls and office visits for benefit estimates.

“Social Security has always talked about the importance of planning for retirement,” Jim Courtney, Deputy Commissioner for Communications at Social Security said. “With the new Retirement Estimator people will find that easier to do. We think it will be a popular and valuable service.” Little did he know how right he would be.

The day after the Retirement Estimator was launched, it was being called “fabulous” on the Today show, featured on CNN Headline News and on radio stations around the country. Hundreds of media outlets and all of the nation’s major newspapers ran stories. At a time when “social media” is the newest avenue of communication, bloggers all across the U.S. were linking to the Retirement Estimator. The result: in the days immediately following the launch, visits to Social Security’s Website nearly tripled.

To support the launch of the Retirement Estimator, the agency released a new fact sheet, “When to Receive Social Security Benefits.” The fact sheet includes information to consider, such as income, life expectancy and health insurance needs, when making the decision to retire. SSA also seized upon the ability to reach millions of Americans, by revamping the Social Security Statement for workers at various stages of life. Workers age 25 – 35 will soon be receiving a re-branded special insert discussing the importance of investing and saving at a young age. Workers age 55 and older will receive a special insert discussing what to consider when retiring and telling them when they are ready to file to use SSA’s simplified retirement application.

## SIMPLIFIED RETIREMENT APPLICATION

Social Security’s online application for retirement benefits has consistently ranked at the top of government online services. In fact, the American Customer Satisfaction Index has given the online benefit application the highest score among all federal Websites; one that ranks with online private sector companies like Amazon.com and Barnes & Noble.

So why mess with success? Preparing for the online event with Kathy Casey-Kirschling, Commissioner Astrue wondered why there were so many screens the users saw with redundant and unnecessary questions. He and the Ready Retirement team recognized that the current online application took much too long – 45 minutes on average to complete.

Data also showed that many users started the online application but became frustrated, dropping out of the process along the way. In fact, in FY07 only about 10 percent of people filing for retirement benefits used the online application. That number has recently increased to about 15 percent as a result of the publicity associated with Ms. Casey-Kirschling filing for her retirement benefits online and other agency outreach efforts. However, as Commissioner Astrue told Congress in April, “In order to keep field offices from being totally overwhelmed, we are going to need to drive that online filing figure...to 50 percent over the next 5 years.”

With personal input from Commissioner Astrue, King, Brune and the Ready Retirement team took a critical look at every aspect of the online application. The

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The new, streamlined and simplified online application, which will be released in the fall, is expected to decrease the time needed to file for retirement benefits online from 45 to 15 minutes. And for some, it could be completed in as little as 10 minutes.



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team found that SSA could use information already in its records to simplify the process. The team also found that it could eliminate or simplify the vast majority of the application questions, and that SSA could use cues, links, streaming video, and other techniques from the best financial services Websites to give the public a friendlier, faster, and simpler experience.

Before finalizing the new online application, SSA showed a prototype to advocacy groups, the Social Security Advisory Board and conducted focus groups to ensure usability. Following, King announced, "The new, streamlined and simplified online application, which will be released in the fall, is expected to decrease the time needed to file for retirement benefits online from 45 to 15 minutes." Brune added, "And for some, it could be completed in as little as 10 minutes."

## AUTOMATED ADJUDICATION

The final, most difficult and most time consuming piece of Ready Retirement is automated adjudication. This piece will require SSA to modify 39 separate COBOL (one of the oldest computer programming languages) program-based systems and make additional improvements to the claims application. It is expected to be up and running by FY10.

"With the new online application and some recent policy changes we put in place, the online retirement process is more fully automated," said King. But not quite – the current process will still require an SSA claims representative to review the application and trigger the retirement benefit. Once automated adjudication is implemented, SSA computers will automatically trigger payment of the retirement benefit without the involvement of a claims representative. "In the coming years, this one change could free up enormous amounts of staff time,"

Commissioner Astrue told Congress.

Automated adjudication is "a win-win situation," according to King. "Not only will our customer service be improved, but in the three fiscal years following implementation, SSA could save approximately \$35 million."

## A NEW LOOK

While Public Education, a Simplified Retirement Application, and Automated Adjudication are the three major "puzzle pieces" of Ready Retirement, there are a number of other activities underway to support its implementation.

In June 2008, SSA unveiled its new homepage at [www.socialsecurity.gov](http://www.socialsecurity.gov). The new look of the Website is more welcoming and user-friendly. It follows the standard for design principles in the industry by reducing clutter, improving navigation, making better use of graphics, reducing the need to scroll down and prioritizing items on the page.

When designing the new Website, Commissioner Astrue made it clear that the focus needed to be on the primary reasons people contact Social Security. Again, the dual purposes were improving customer service while at the same time reducing the need for people to have to visit a field office. The three main topics that appear front and center on the Website are:

- Filing online for retirement benefits;
- Applying for disability benefits; and
- Requesting a Social Security card.

Nearly half of the people who visit Social Security's field offices do so for one of these reasons.

For the first time, visitors to the Website also can watch a brief video introduction to the site delivered by an agency employee. Also, while the look of the home page has changed, the Web addresses have not. The agency made sure during the redesign that the favorite sites that frequent visitors have bookmarked would not change.

Since its re-launch, Social Security's new home page has been widely praised by

visitors and by other government agencies. Perhaps most important, Social Security's frontline employees have been extremely enthusiastic and believe that it will help them to better market Social Security's online services and Ready Retirement initiatives.

## FIELD OFFICE OF THE FUTURE

Tanya Harrington, District Manager of the Social Security field office in Aurora, Colorado, is optimistic about Ready Retirement and encourages people in her service area to check out Social Security's online services. "We say tell your neighbors, tell your friends. They are very happy with the response time [when they file for benefits]," Harrington said "People also are happy they don't have to come into a crowded office," she added. "Many of them tell us 'How nice it is to do it from home' or 'It's a lot easier than I thought it would be.'"

However, not everyone is ready to make the leap to doing business online. "It's a different way of doing business with SSA," noted Harrington. "Like with any new changes, it will take people a while to adjust."

To help them adjust, in the Denver region where Harrington works, Social Security is piloting the use of personal computers in field office reception areas. This provides an option for those who may not have access to a personal computer at home, or to those who were not aware of the online service options available.

SSA also is piloting Social Security TV – an unobtrusive slideshow presentation in field office waiting rooms to remind people of the documents they need in order to file a claim or receive a new or replacement Social Security card. Those people who do not have the necessary documentation with them can leave to get it and come back, or call a family member



*Commissioner Astrue looked on as Kathleen Casey-Kirschling, the Nation's First Baby Boomer, applied for retirement benefits online during a news conference at the National Press Club on October 15, 2007.*

to bring it to them, so that they will have a fully successful visit. The slides also provide information about SSA's online and 800 number services so visitors know there are alternatives to visiting a field office the next time they need assistance.

In addition, Commissioner Astrue has authorized the purchase of new intake kiosks for field offices that will provide a modern, fast, and user-friendly tool for the public to register the reason for their visit. The kiosks incorporate touch screen technology and are similar to those many Americans use for airline travel. The new intake kiosks will help the office to more quickly get the person to the right interviewer.

## THE FUTURE IS NOW

Casey Kim, District Manager in the San Francisco Region, knows all too well the impact of the "silver tsunami." He works in one of the busiest field offices in the Los Angeles area with an average of almost 400 visitors per day. He has no doubt that Ready Retirement will improve service. "It's our duty to promote this," Kim said.

"It's definitely going to help reduce traffic to the field office and will free up staff to do our other critical work."

Kim also expects more and more of the public to embrace the simplified retirement application. "[The new online application] is not as technical and it's easier for the public to understand," Kim added. "This is the future," he emphasized.

Kathy Casey-Kirschling, America's first baby boomer and advocate for filing for retirement benefits online, would no doubt agree.

"With Kathy and millions of her fellow baby boomers becoming eligible for retirement benefits, SSA is at a watershed moment in its history," Commissioner Astrue said. "It is imperative that we develop a wide range of online and automated services and transform the way we do business. Through initiatives like Ready Retirement we will continue to provide the American public with the type of service they expect and deserve." ■

*Kia S. Green is a Public Affairs Specialist for the Social Security Administration.*