

NAVIGATING THE IMPACT OF PTSD



• FMA-FEEA
• Scholarship Winner
• Announced!
• **14**

• Tracking Legislation
• on Behalf of
• Federal Managers
• **22**



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Article Submission

All materials submitted to The Federal Manager should pertain to public service managers. Copy should be double-spaced and no longer than 10 pages. High resolution 300 dpi, color images in JPG or TIF format, as well as charts, or illustrations in EPS vector format, should be included if possible. Text should be submitted by email or on compact disc. Please also include a biography of the author.



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From Our President...

WALKING THE HALLS OF CONGRESS

FMA Family,

It is late November as I write this article, and I hope you and your family had a great Thanksgiving and a joyous Holiday Season. The good news is that we are probably going to receive a 5.2 percent raise for 2024. The bad news is that we are currently working under another continuing resolution (CR), some agencies until January 9 and others until February 2, and our raises will not come into effect until Congress finalizes appropriations. The pay increase will be retroactive, going back to the beginning of the year. Please continue to contact your members of Congress urging them to do their job and fund the federal government.

As I previewed in the fall issue of this magazine, I was in Washington D.C., October 17-20, 2023. I represented FMA at the Samuel J. Heyman Service to America Medals gala at the John F. Kennedy Center the evening of the 17th. This annual event honors exceptional public servants for their outstanding work on behalf of our country. Since we, as federal workers, get an unfavorable, false label sometimes, it was great to see us getting this well-deserved recognition. On the 18th, our Government Affairs Director Greg Stanford and I walked the halls of Congress, speaking to our Congressional representatives. Walking the halls of Congress and advocating for federal employees is one of my favorite things to do, and the day was filled with a lot of walking, but with great conversations with our representatives about important issues such as:

- Fiscal Year 2024 Appropriations
- GS Pay Scale
- The 2024 pay raise
- Hiring/Retaining Reform
- The Equal COLA Act
- Federal Retirement Fairness Act
- Telework policies
- Supervisor Training
- Honoring Feds Killed in the Line of Duty
- GPO/WEP

On the morning of the 19th, Greg handed me off to our National Executive Director Todd Wells and we attended the Employee Thrift Advisory Council (ETAC), which advises the Federal Retirement Thrift Investment Board. FMA is honored to be recognized and have a seat on ETAC, which gives our members a voice regarding their Thrift Savings Plan (TSP).

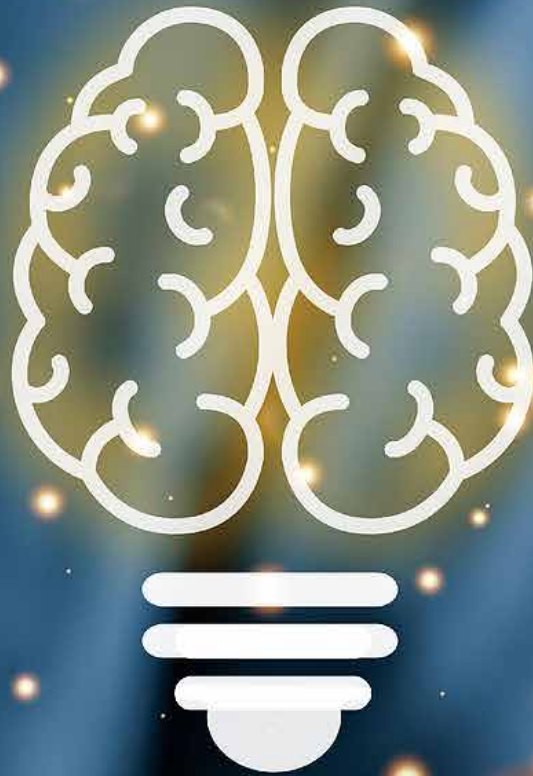
In the afternoon of the 19th, Greg, Todd and I met with Drew Friedman, a reporter for Federal News Network, to discuss the issues we have been working on and to offer insights into the conversations we had the previous day on the Hill.

We will soon hold our yearly Town Hall Zoom meeting to discuss this year's Issue Briefs that will be discussed with our representatives during our Annual FMA National Convention in Alexandria, Virginia, March 24-27. Greg Stanford will lead this discussion and we would like to have your input. I hope you will join us for this year's convention, and I would love to see you there.

As always, thank you for all you do as federal employees. We are often underappreciated, and definitely underpaid, but we are humbled to work for the citizens of these United States as Public Servants. Also, thank you for supporting the men and women of our armed forces, your commands/agencies, your communities and your continued support and membership in FMA. Happy New Year! ●

Sincerely,

Craig Carter
FMA National President



NAVIGATING THE IMPACT OF PTSD: LIVING, LOVING, AND LEADING

By Antoinette Allen, Ph.D.

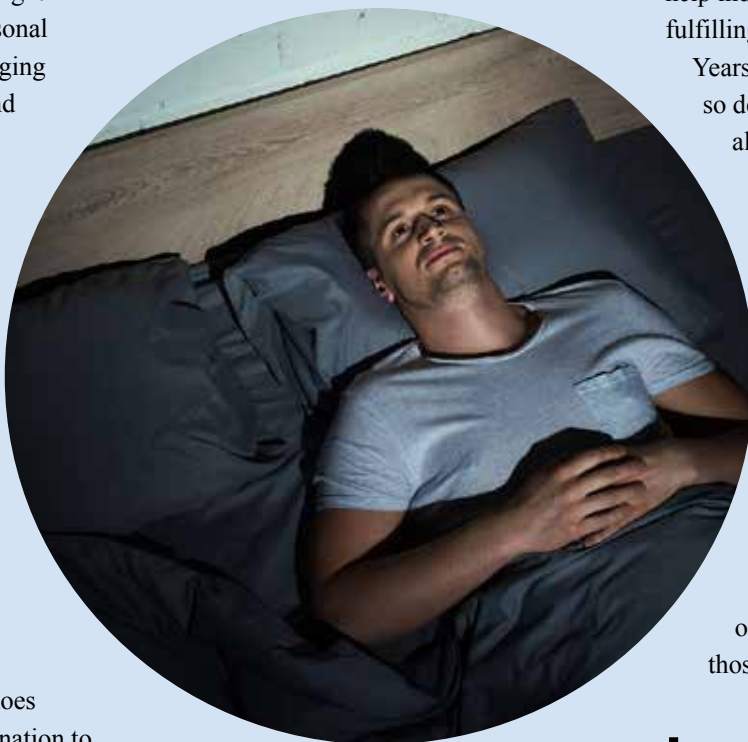
In the world of federal leadership, individuals living with Post-Traumatic Stress Disorder (PTSD) face unique and intricate challenges. Often linked with combat veterans, PTSD affects people from all walks of life. Currently, it's estimated that 6 percent of the American population and 11–23 percent of veterans experience PTSD symptoms at some point in their lives, resulting in approximately 8 million people living, loving, and leading with PTSD each year. This article aims to shed light on the impact of PTSD on personal and professional lives while urging leaders to embrace empathy and understanding.

As a retired veteran and leadership educator, I sit at the intersection of this lived experience, embodying the trials and triumphs of living, loving, and leading with PTSD. I've encountered remarkable individuals and collaborated with them as we navigated our federal careers. This condition does not impede employees from achieving their goals or fulfilling their mission, but it does require dedication and determination to overcome the associated challenges. A decade ago, I underwent a significant shift in perspective and career, recognizing the necessity of healing. This led to the creation of leadership development content centered on healing and forgiveness for federal leaders. As the pandemic exposed the nation's mental health crisis, my team and I swiftly collaborated to provide courses

aiding federal employees, teams, and units in reducing the impact of isolation, loneliness, and negative emotions.

Living with PTSD

PTSD is a mental health condition triggered by traumatic events, with



symptoms that can be debilitating, affecting all aspects of one's life. Federal leaders face unique challenges as they manage PTSD alongside their high-stress responsibilities. Living with PTSD entails coping with intrusive thoughts, flashbacks, and hypervigilance, which

can disrupt daily routines and hinder productivity.

However, it's essential to understand that PTSD doesn't define a person; it's just one facet of their life. Living with PTSD requires resilience and a commitment to self-care. Leaders can set an example by promoting mental health awareness and providing resources for employees who may be struggling. Fostering a culture of support and understanding allows federal leaders to help individuals with PTSD live more fulfilling lives.

Years ago, I chose to bury my trauma so deep that even I couldn't find it, all while adhering to perfectionism and workaholism. This strategy served me well, until it didn't. After years of high-stress jobs and personal setbacks, the suppressed trauma resurfaced. Years of neglecting my mental health had taken a toll, and I didn't realize the importance of addressing it until it was unavoidable. Even then, I grappled with shame and a sense of weakness, but I pushed past those feelings to improve my life.

Loving with PTSD

Maintaining healthy relationships can be a significant challenge for those with PTSD, straining partnerships, friendships, and familial bonds due to the emotional and psychological toll of the condition. Leaders must recognize that their

continued on next page

COVER STORY

employees, colleagues, or subordinates may face relationship difficulties related to PTSD.

Empathy and open communication are vital in fostering supportive relationships. Leaders can lead by example, offering understanding and patience when employees encounter personal challenges. Encouraging employees to seek therapy or counseling proactively supports their mental health and relationships. By acknowledging PTSD's impact on personal life, leaders can help individuals navigate these challenges more successfully.

As a leader, I frequently advocated for the Employee Assistance Program (EAP) but did not use it myself. I had

candid conversations with employees who needed assistance but saw them turn down offers for help to avoid the stigma of not being strong enough. Humility, a key leadership skill, remains a challenge for many leaders.

When employees lack love and support at home, it can affect their ability to connect in the workplace, leading to apathy, disconnection, and withdrawal. While leaders are not therapists, they have a



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By promoting a healthy work-life harmony and fostering a supportive environment, leaders with PTSD can lead by example, demonstrating that it's possible to thrive professionally while managing a mental health condition.

responsibility to monitor employees' overall well-being, including their mental health.

Leading with PTSD

Leading a team while dealing with PTSD may seem daunting, but with the right support and strategies, it's entirely possible. Federal leaders with PTSD can be effective and inspirational role models. Transparency about one's condition can help reduce the stigma surrounding mental health and create a more authentic workplace.

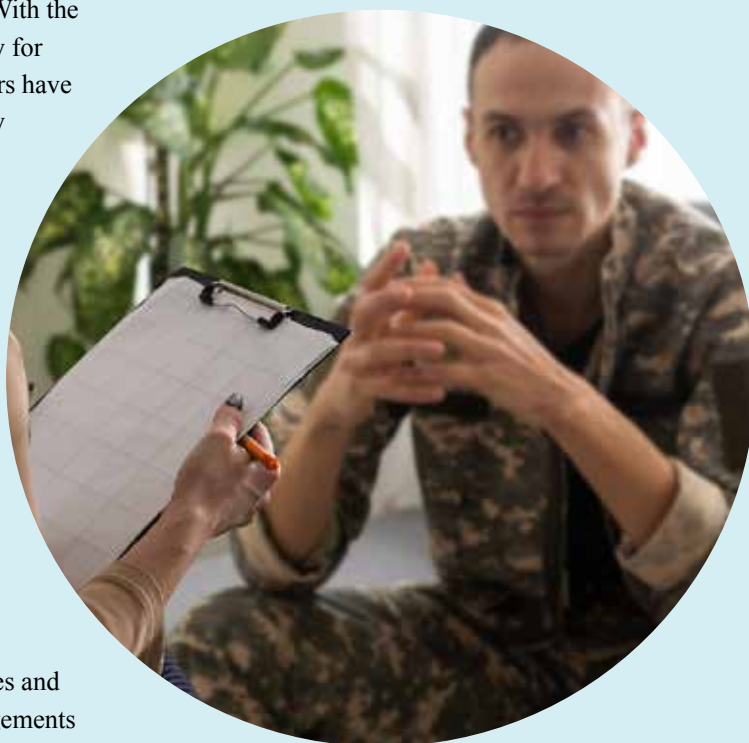
Several years ago, I had the opportunity to speak candidly about my experiences with anxiety and depression stemming from PTSD during a presentation to executive leaders. I encouraged them to share their fears and vulnerabilities, thereby normalizing the fears that hold many of us hostage as we wear inauthentic masks. With the increase in advocacy for mental health, leaders have a unique opportunity to serve as mental health allies and role models.

Leaders should prioritize self-care and seek professional help when needed. Stress-reduction techniques like intentional movement, mindfulness practices and flexible work arrangements

can be implemented within their teams. By promoting a healthy work-life harmony and fostering a supportive environment, leaders with PTSD can lead by example, demonstrating that it's possible to thrive professionally while managing a mental health condition. It is expected that current and future leaders will be knowledgeable and proactive about mental health. This is directly related to increased advocacy and prioritization of mental health among the youngest generation.

Reconnecting The Impact On Veterans

In 2021, veterans comprised 31 percent of the federal workforce, with a higher likelihood of developing PTSD compared



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While PTSD is undoubtedly a significant concern among veterans and active-duty military personnel, it's crucial to recognize that this condition can affect individuals from all walks of life, beyond the battlefield.

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to civilians. This means many federal leaders and employees may have team members who have experienced or are dealing with PTSD. One of the most poignant aspects of living with PTSD, particularly for veterans, is the challenge of reconnecting with civilian life, family, and friends after experiencing combat or non-combat traumas.

For many veterans, memories of combat and past experiences can cast a long shadow, manifesting as intrusive thoughts and vivid flashbacks, making it challenging to engage fully in everyday activities or social interactions. This can lead to a sense of isolation, as veterans often feel that others cannot truly understand their experiences.

The perception of PTSD has long been closely associated with its origins in the context of war and combat, often overshadowing its prevalence and impact in various other settings and circumstances. While PTSD is

undoubtedly a significant concern among veterans and active-duty military personnel, it's crucial to recognize that this condition can affect individuals from all walks of life, beyond the battlefield. Its impact extends to survivors of various traumatic events, such as natural disasters, accidents, domestic violence, physical and sexual assault, and other forms of trauma.

Federal leaders need to be aware of the unique struggles veterans with PTSD face when trying to reconnect. It's essential to recognize that women are more likely to develop PTSD compared to their male counterparts. While veterans often have a strong sense of duty, it can lead to overwork and burnout as they strive to excel in their new careers. Not every veteran who experiences trauma develops PTSD. Leaders will need to foster trust early amongst their team members. There were very few leaders during my federal career who ever knew I was distressed. I wore a polished smile daily to cover my pain, and since my work product was good, no one inquired.

Leaders can support veterans by offering flexibility and understanding during the transition period. Encouraging veterans to seek counseling or therapy services and providing access to these resources is crucial.

Additionally, leaders can foster a sense of community and belonging



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FMA Grassroots Update

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MATTHEW COMPHER – WINNER OF THE 2023 FMA-FEEA SCHOLARSHIP!

As a proud supporter of the Federal Employee Education & Assistance Fund (FEEA) scholarship program, the Federal Managers Association is very pleased to recognize the 2023 FMA-FEEA Scholarship winner!

Matthew Compher, a student at Michigan Technological University, is the FMA family member who earned an FMA-FEEA scholarship in recognition of his outstanding grades, as well as community service and recommendations from professors

and community leaders. He is working hard to improve himself and support his community.

Matthew's father, and scholarship sponsor, is Michael Compher, a supervisor at the U.S. Environmental Protection Agency Region 5 - Chicago, and a proud member of FMA Chapter 375.

Please enjoy reading Matthew's winning essay. The prompt question is presented in italics.

Describe a situation in your school, social, or family life, when you demonstrated leadership and overcame obstacles. Explain the situation, what obstacles you faced, and which leadership qualities you used to overcome those obstacles.

As a high school Freshman, I joined a robotics team made up of Juniors. I had been developing my designing and building skills since I was old enough to use scissors, but my team really needed leadership. At the end of my first season, I was elected co-captain. This was so unexpected I asked myself: What made this team of upperclassmen elect me, a freshman, as their leader? My past experience helps answer it.

In 6th grade, I joined Boy Scouts, which is youth-led. Early on, I saw leadership styles that worked well and others that did not. After a few years, I took the Boy Scouts' National Youth Leadership Training. My leadership skills really started to develop with this course, in combination with my real-life experiences leading my peers. As I progressed through Scouting, like older Scouts did for me, I applied what I learned, shared what I knew with younger Scouts, and continued to learn by leading.

I am also a ski instructor. When I started, I had an advantage over other new instructors because I already had experience demonstrating skills from Scouting. Then, I decided to become professionally certified, which required classes about teaching approaches, group handling skills, and tools for helping students who are struggling. Since getting certified, I have taught people from 2 - 65 years old how to ski.

Between skiing and Scouting, I have learned how kids tend to be visual learners and adults prefer to have things thoroughly

explained. Some people are fearless, while others are too nervous to try. I have learned questions to ask that help people realize what they are doing right or wrong. For example, if a ski student has a successful run, I might ask "what felt different?" or "what clicked?" In robotics, I love to ask "why?" If something is not working, I might ask, "why does it do



that?" I am looking for an articulable reason why something is happening. By explaining "why," the person often realizes their problem doesn't need to exist or the process of explaining helps find the solution. In either of these situations, as a leader, I gather information to determine next steps, engage those I am leading, and motivate them to learn.

After two years of leading my first robotics team to the world championship, and two years of it being canceled (thanks COVID), everyone on my team graduated. I found a new team, which

was well established and successful. They asked what position I wanted. I said Captain. They said "no, you are too new." To everyone's surprise but my own, by the league tournament in January I was acting as a co-captain, and by the state meet in March, I was voted to be the next senior captain. I don't say this to brag. Rather, by then, I knew the answer to my question – what skills and attributes do I have that a team wants in its leader? They want someone with patience, skills, and experience, someone who can communicate well and motivate others. My time in Scouting and as a ski instructor have developed those skills for me. ●



FEEA

FEDERAL EMPLOYEE EDUCATION & ASSISTANCE FUND

FEEA is the official charity of the Federal Managers Association, and we encourage members to support their work. FEEA is the only independent, nonprofit 501c3 organization devoted solely to providing emergency financial assistance and scholarships to our dedicated civilian federal and postal public servants and their families. To learn more about FEEA, please visit feea.org. If we receive more donations, we will be able to offer more FMA-FEEA Scholarships. Please make a tax-deductible donation at: www.feea.org/givefma. Thank you for supporting the future leaders of America!

A man with a full, dark beard and mustache is smiling broadly. He is wearing a white t-shirt and has a tattoo on his left forearm. He is holding a square sign with a dark grey background and a light-colored wooden frame. The sign has the text 'FMA ANNOUNCEMENTS!' written on it in white, bold, sans-serif capital letters. His right hand is pointing towards the sign, and his left hand is holding the bottom edge of the frame. The background is a solid, bright yellow color.

**FMA
ANNOUNCEMENTS!**

A lot is happening at the Federal Managers Association, and we want you to be involved. Please review the following and make plans to attend FMA's convention in March 2024. Also, consider running for a national board position, or nominate a colleague for one of FMA's prestigious awards. You can always visit www.fedmanagers.org for the latest information about FMA. We look forward to hearing from you!

Attend FMA's National Convention

FMA's 86th National Convention and Management Training Seminar will be held March 24 - 27, 2024, in Alexandria, Virginia. Convention attendees liked the hotel so much last year that we are returning in 2024 and 2025 to the Hilton Alexandria Old Town Hotel, close to FMA's National Office, and just a block from the King Street Metro Station. Old Town Alexandria offers restaurants and entertainment of all kinds!

You are invited to help us plan FMA 2024 and beyond. The convention offers a great way to get to know your fellow FMA members working across the federal government. As always, we will have an outstanding day of training and will visit our legislators on Capitol Hill to educate them on issues important to you and your career.

Start making plans now to attend. And think about bringing family and friends and turn it into a fun vacation. FMA conventions are always a great experience for those in attendance. You'll find the most current information on the FMA website at: www.fedmanagers.org/events. We hope to see you there!

National Executive Board Elections

The positions of FMA National President, National Secretary, Region

1 Director, and Region 3 Director are up for election at the 2024 National Convention. All nominations must be submitted no later than January 28, 2024. Contact Nominations Committee Chair Pat Niehaus at fmapatricia@hotmail.com, and Executive Director Todd Wells at twells@fedmanagers.org to express your interest or for more information.

FMA Award Nominations

Do you know an outstanding federal manager who deserves to be recognized for his/her service? Work with your Chapter President to nominate them for an FMA award. Chapters should submit nominations for FMA's *Manager of the Year* and *Gil Guidry Award* to their respective Region Directors no later than February 8, 2024. Each chapter may submit one nomination for each award. To learn more about these awards, and the nominating process, visit: fedmanagers.org/awards. Region Directors' contact information may be found at: fedmanagers.org/Contact-Us. Help us celebrate our outstanding federal manager members!

Resolutions

FMA welcomes proposed resolutions from our members to identify matters of concern to be addressed by the Association. Please discuss resolutions with your chapter leaders prior to submission to ensure the chapter stands behind the resolution and will be ready to speak to it at the convention.

Resolutions must be submitted to the National Office no later than February 8, 2024. Forward resolutions to Greg Stanford, Director of Government Affairs, at gstanford@fedmanagers.org.



Write an Article for The Federal Manager

We love to hear from our members! And FMA members love to hear what their fellow members and chapters are up to! Please share pictures and a short (or not short) article and we'll publish your work in a future issue of *The Federal Manager* magazine. Send us pictures of your chapter's holiday party, lunch, dinner, happy hour, or any other event you held. It's not only fun to see what our colleagues are up to across the country, but it may inspire another member or chapter to do something they have not done before. Like make a team for an upcoming 5K run/walk, or volunteer for a local "clean up" day. Nothing is too small or big, we just want to hear about the good stuff you and your chapter are up to. Send pictures and articles to Todd Wells at twells@fedmanagers.org. ●

FMA REGIONS 3 & 4 CONFERENCE CONVENES ON LAKE TAHOE

By Todd Wells

Federal Managers Association Regions 3 and 4 conducted their annual joint conference at Harrah's Lake Tahoe in Stateline, Nevada, September 29-30, 2023. Chapters represented were Puget Sound Naval Shipyard, Bremerton, Washington, Travis Air Force Base, California, and Naval Weapons Station, Concord, California. Located on the shore of Lake Tahoe, the hotel offered spectacular views of the lake and mountains, with snow arriving overnight on the peaks. The conference kicked off with a reception in a room formerly used by the famous Rat Pack when in town. Though there was no sign of Frank Sinatra or Sammy Davis Jr., it was easy to imagine them relaxing and enjoying

themselves in the corner room with amazing scenery. The FMA members and spouses enjoyed good food and refreshments and happily caught up with one another.

On Saturday, the conference began with introductions by each of the chapter leaders in attendance.

FMA President Emeritus Pat Niehaus then presented on her experience of recently going through the retirement process and offered insights



Region 4 Deputy Director and Chapter 14 President James Cappa and Chapter 14 Vice President, Jennifer Froderberg.



Region 4 Director Vincent Stamper presents on The Future of the Workforce.



Chapter 14 member Kyle Denton and Region 4 Treasurer and Chapter 90 President John Mikel.

into how to best prepare and maneuver to ensure the smoothest experience possible. This process ideally starts years in advance of a retirement target date. Johnny Gottstein, president of GPIS Federal Benefits Specialist, provided an outstanding overview of federal employee life insurance options, giving everyone in attendance a lot to think about, and with more confidence to improve their current coverage and plan.

After lunch, FMA Executive Director Todd Wells provided an overview of what is keeping the national office staff busy these days, as well as an overview of the top government affairs/

MEMBERS IN ACTION

legislative matters we are working on. Then Region 4 Director Vincent Stamper presented a riveting talk on *The Future of the Federal Workforce*. His inclusion of AI, and other systems that help his colleagues at the shipyard work smarter and more productively was truly enlightening.

Despite the great presentations noted above, the best part of the conference was the chance for attendees to have extended discussions about the myriad



Vincent Stamper leads discussion among conference participants.

issues FMA and our managers must address in the current climate. Many good ideas were brought up, and follow-up on possible ways to improve our member communications will be undertaken in the coming months.

Thank you to everyone who journeyed to the conference. Special thanks to Pat Niehaus who planned the event and provided an amazing experience for all who attended. It was one to remember! ●

Todd Wells is Executive Director of the Federal Managers Association.

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MEMBERS IN ACTION



Above: FMA members participate in discussion of Regions 1 and 2 matters.

Left: Adam Henckler presents on "Mentoring and Gen Z."

FMA REGIONS 1 AND 2 CONFERENCE REPORT

By Jeremy Barton

FMA Chapter 6, Portsmouth Naval Shipyard, sponsored this year's Regions 1 and 2 Conference in Manchester, New Hampshire, October 20 and 21. Although attendance was lower than hoped for, we still managed to have a great time. Conference attendees were joined by Ron Rothermel from GPIS Employee Benefits Specialist who gave a great Federal Employee Benefits presentation. After lunch, we had the pleasure of Adam Henckler presenting outstanding training on "Mentoring and Gen Z." Mr. Henckler is a Shop Superintendent at Portsmouth Naval Shipyard and has provided this training as a Ted Talk. Later that evening, the hotel had a comedy show that we all went to and had a great time laughing.

Thank you to everyone who attended! ●

Jeremy Barton is FMA Region 1 Director and a member of Chapter 6, Portsmouth Naval Shipyard in Portsmouth, New Hampshire.



National Secretary Chris Lombardi shares a laugh with Chapter 3 President Jeris Smith.

MARK'S BIG ADVENTURE — TRAVELING IN RETIREMENT

By Mark Butera

Following is an excerpt from Chapters 228/261 recent newsletter. Thank you to both chapters for sharing!



I fulfilled my plan when I retired on December 31, 2022. After working for the Internal Revenue Service for 36 years, I boarded a cruise ship for a 92-day adventure. My wife, Wendy, and I sailed from San Diego, California to Yokohama, Japan. We spent five days in Tokyo and returned to our ship with friends and sailed around Japan. After that we spent 10 more days in Tokyo in two different areas. We then boarded another ship and sailed from Tokyo to Seattle, Washington, by way of Alaska. The trip was fascinating. You can't beat shipboard life, but the time spent in Japan was amazing. It is a beautiful country and the people we ran into were very friendly and helpful. We would both like to go back to Japan in the future.

In the meantime, we have a few shorter trips planned and our next big adventure (65 days) is Europe in Winter 2024, with a Christmas Market River Cruise. I look forward to reporting on that adventure, too! ●

Mark Butera is a member of Chapter 261, Internal Revenue Service (IRS) - New Jersey District, and Editor of the joint Chapters 228/261 Newsletter. You can find other issues of chapter newsletters at <https://www.fedmanagers.org/Chapters>.

TRACKING LEGISLATION ON BEHALF OF FEDERAL MANAGERS



By Greg Stanford

FMA maintains a legislative tracker online that provides all members a comprehensive look at legislation introduced in the 118th Congress. The tracker identifies information about bills we are monitoring on behalf of managers, organized in basic issue areas. You can access the tracker, which is updated on our website at <https://fedmanagers.org/Legislative-Tracker>.

Below, you will find the legislation FMA is actively tracking as of writing this article. Legislation introduced in the House of Representatives begins with "H.R.," while legislation introduced in the Senate begins with "S." If similar bills have been introduced in both chambers, they have been compiled into one listing, reflecting sponsors and cosponsors for the legislation, along with a short summary, and a notation of actions taken as of late November.

Many of the bills noted on the tracker have prepared action letters you can personalize and send to your elected officials to help build support. Please take a look to see if your Members of Congress are cosponsors of legislation you are interested in. If they are not, we encourage you to visit our action letter page at <https://fedmanagers.org/Action-Letters> and urge them to support FMA's legislative priorities.

Pay and Benefits

H.R. 536 / S. 124 – The Federal Adjustment of Income Rates (FAIR) Act

FMA Position: Support

House Sponsor: Rep. Gerry Connolly (D-VA)

Cosponsors: 76 (D) 1 (R)

Senate Sponsor: Sen. Brian Schatz (D-



HI)

Cosponsors: 19 (D) 1 (I)

Bill Summary: Modifies pay rates for federal employees in 2024. Specifically, the bill increases rates under the statutory pay systems and for prevailing rate employees by 4.7% and increases locality pay by 4%.

Most Recent House Action: Referred to the House Committee on Oversight and Accountability – January 26, 2023

Most Recent Senate Action: Referred to the Committee on Homeland Security and Governmental Affairs – January 26, 2023

H.R. 856 / S. 274 – Comprehensive Paid Leave for Federal Employees Act

FMA Position: Support

House Sponsor: Rep. Don Beyer (D-VA)

Cosponsors: 33 (D) 3 (R)

Sponsor: Sen. Brian Schatz (D-HI)

Cosponsors: 10 (D) 1 (I)

Bill Summary: Provides paid family and medical leave to federal employees for conditions covered by the Family and Medical Leave Act (FMLA).

Most Recent House Action: Referred to the Committee on Oversight and

Accountability, Veterans' Affairs, and House Administration – February 7, 2023

Most Recent Senate Action: Referred to the Committee on Homeland Security and Governmental Affairs – February 7, 2023

H.R. 5171 – Pay Compression Relief Act

FMA Position: Support

Sponsor: Rep. Eleanor Holmes Norton (D-DC)

Cosponsors: 9 (D)

Bill Summary: Allows federal employees who reach the pay cap in their respective pay system to receive the base and locality pay adjustments they would otherwise be entitled to.

Most Recent Action: Referred to the Committee on Oversight and Accountability and the Committee on Armed Services – August 8, 2023

S. 3029 – Honoring Civil Servants Killed in the Line of Duty Act

FMA Position: Support

Sponsor: Sen. Kyrsten Sinema (I-AZ)

Cosponsors: 2 (R) 1 (D)

Bill Summary: Increases benefits to survivors of federal employees who die in the line of duty

Most Recent Action: Ordered to be reported with an amendment favorably from the Committee on Homeland Security and Governmental Affairs – October 25, 2023

Retirement Issues

H.R. 82 / S. 597 – Social Security Fairness Act

FMA Position: Support

House Sponsor: Rep. Garret Graves (R-LA)

continued on next page

Cosponsors: 201 (D) 99 (R)

Senate Sponsor: Sen. Sherrod Brown (D-OH)

Cosponsors: 39 (D) 7 (R) 3 (I)

Bill Summary: Repeals the Government Pension Offset (GPO) and the Windfall Elimination Provision (WEP)

Most Recent House Action: Referred to the House Committee on Ways and Means – January 9, 2023

Most Recent Senate Action: Referred to the Committee on Finance – March 1, 2023

H.R. 716 – Fair COLA for Seniors Act

FMA Position: **Support**

Sponsor: Rep. John Garamendi (D-CA)

Cosponsors: 37 (D)

Bill Summary: Bases cost-of-living adjustments for certain benefits available through federal and military retirement programs, Social Security, and specified programs for veterans on a price index that tracks the spending patterns of older consumers.

Most Recent Action: Referred to the Committees on Ways and Means, Veterans' Affairs, Oversight and

Accountability, and Armed Services – February 1, 2023

H.R. 866 / S. 3194 – Equal COLA Act

FMA Position: **Support**

House Sponsor: Rep. Gerry Connolly (D-VA)

Cosponsors: 40 (D) 3 (R)

Senate Sponsor: Sen. Alex Padilla (D-CA)

Cosponsors: 4 (D) 1 (I)

Bill Summary: Revises the formula used to calculate the cost-of-living adjustment for annuities paid under the Federal Employees Retirement System (FERS).

Most Recent House Action: Referred to the House Committee on Oversight and Accountability – February 8, 2023

Most Recent Senate Action: Referred to the Committee on Homeland Security and Governmental Affairs – November 1, 2023

H.R. 4260 – Public Servants Protection and Fairness Act of 2023

FMA Position: **Support**

Sponsor: Rep. Richard Neal (D-MA)

Cosponsors: 102 (D)

Bill Summary: Provides an equitable Social Security formula for individuals with noncovered employment and to provide relief for individuals currently affected by the Windfall Elimination Provision.

Most Recent Action: Referred to the House Committee on Ways and Means – June 21, 2023

H.R. 5955 – Federal Retirement Fairness Act

FMA Position: **Support**

Sponsor: Rep. Derek Kilmer (D-WA)

Cosponsors: 16 (D) 13 (R)

Bill Summary: Provides that civilian service in a temporary position after December 31, 1988, may be creditable service under the Federal Employees Retirement System

Most Recent Action: Referred to the House Committee on Oversight and Accountability – October 25, 2023

Empowering Managers

H.R. 159 / S. 59 – Chance to Compete Act

FMA Position: **Support**

House Sponsor: Rep. Virginia Foxx (R-NC)

Cosponsors: 3 (D) 2 (R)

Senate Sponsor: Sen. Kyrsten Sinema (I-AZ)

Cosponsors: 2 (R) 1 (D)

Bill Summary: Modifies examination requirements and other components of the federal hiring process for positions in the competitive service.

Most Recent House Action: Passed the House January 24, 2023, by a vote of 422-2. Referred to the Senate Committee on Homeland Security and Governmental Affairs – January 25, 2023

Most Recent Senate Action: Referred to the Committee on Homeland Security and Governmental Affairs – January 24, 2023

S. 135 – Preventing Government Shutdowns Act of 2023

FMA Position: **Support**

Sponsor: Sen. James Lankford (R-OK)

Cosponsors: 16 (R) 2 (D) 2 (I)

Bill Summary: Provides continuing appropriations to prevent a government shutdown if any of the appropriations bills for a fiscal year have not been enacted before the fiscal year begins and continuing appropriations are not in effect. The bill also limits official travel, congressional recesses or adjournments, and the consideration of legislation that is unrelated to appropriations after the beginning of a fiscal year if the appropriations process has not been completed.

Most Recent Action: Referred to the Committee on Homeland Security and Governmental Affairs – January 30, 2023



S. 3015 – Telework Reform Act of 2023

FMA Position: Support

Sponsor: Sen. James Lankford (R-OK)

Cosponsors: 1 (I)

Bill Summary: Enhance the training and monitoring, policy and support, accountability, and reporting with respect to remote work and telework; Directs agencies to identify potential value from increasing remote and other telework opportunities, which job classifications could benefit from being performed through telework, and expected cost savings and productivity outcomes resulting from the increased use of remote work and telework.

Most Recent Action: Referred to the Committee on Homeland Security and Governmental Affairs – October 4, 2023

Preventing Fraud, Waste and Abuse

H.R. 249 – Bonuses for Cost Cutters Act of 2023

FMA Position: Support

Sponsor: Rep. Chuck Fleischmann (R-TN)

Cosponsors: 0

Bill Summary: Expands the awards program for cost-saving identifications by federal employees of fraud, waste, or mismanagement.

Most Recent Action: Referred to the House Committee on Oversight and Accountability – January 10, 2023

Preserving Due Process

H.R. 1002 / S. 399 – Saving the Civil Service Act

FMA Position: Support

House Sponsor: Rep. Gerry Connolly (D-VA)

Cosponsors: 17 (D) 3 (R)

Senate Sponsor: Sen. Tim Kaine (D-VA)

Cosponsors: 15 (D) 1 (I)

Bill Summary: Prohibits changes to the classification of positions in the competitive service and excepted service unless certain conditions are met.

Most Recent House Action: Referred to the House Committee on Oversight and Accountability – February 14, 2023

Most Recent Senate Action: Referred to the Committee on Homeland Security and Governmental Affairs – February 14, 2023

H.R. 3115 / S. 1496 – Public Service Reform Act

FMA Position: Oppose

House Sponsor: Rep. Chip Roy (R-TX)

Cosponsors: 14 (R)

Senate Sponsor: Sen. Rick Scott (R-FL)

continued on page 27

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To learn more about FMA's government affairs and FMA-PAC related activities, contact Director of Government Affairs Greg Stanford at gstanford@fedmanagers.org, or call 703.683.8700.





CAPITAL INSIGHTS

On October 4, Senator Kyrsten Sinema (D-AZ), Chair of the Senate Subcommittee on Government Operations and Border Management, reintroduced legislation (S. 3029) that would increase death gratuities and funeral allowances for federal employees. FMA endorsed this bipartisan legislation, which is cosponsored by Sens. Bill Hagerty (R-TN), Alex Padilla (D-CA), and Josh Hawley (R-MO).

In a statement of support for the bill, FMA National President Craig Carter said, “This legislation would improve and expand death gratuities for survivors of federal employees killed in the line of duty. The current rates have not kept up with the times, staying static since 1997, and the funeral allowance hasn’t changed since 1966. This important legislation recognizes the dangers federal employees subject themselves to when serving their fellow Americans and will help ensure their families and loved ones will be treated fairly if they make the ultimate sacrifice in the line of duty.”

The Senate Homeland Security and Governmental Affairs Committee favorably advanced S. 3029 with a modified amendment on October 25, clearing it for consideration on the Senate floor. ●

On October 19, Rep. Derek Kilmer (D-WA) reintroduced the Federal Retirement Fairness Act (H.R. 5995). The bipartisan bill is cosponsored by Reps. David Valadao (R-CA), Gerry Connolly (D-VA), and Don Bacon (R-NE). This FMA-endorsed legislation would allow FERS employees to make catch-up contributions for their temporary and intermittent service, in the same manner as their CSRS colleagues.

“The Federal Managers Association (FMA) appreciates the support, time, and efforts from Representative Kilmer (D-WA-06) on the introduction of the bipartisan bill Federal Retirement Fairness Act,” said James V. Cappa, President, FMA Chapter 14. “Federal workers would like to see this inequality corrected and allow Federal Employees Retirement System (FERS) employees to make deposits (buy-back the time) in the same manner as CSRS employees.” ●

On August 31, President Biden sent a letter to congressional leadership formally issuing the call for a 5.2 percent across-the-board pay raise for federal employees in 2024, made up of a 4.7 percent increase to base pay and an average boost of 0.5 percent for locality pay. It maintains parity with the pay raise for the uniformed military, included in both the House and Senate versions of the National Defense Authorization Act, and it would be the largest pay raise in 44 years.

Under Title 5, United States Code, Biden is authorized to implement “alternative plans for pay adjustments” for feds if “national emergency or serious economic conditions affecting the general welfare,” call for it. Congress has stayed silent on the issue of federal employee pay throughout the summer, effectively endorsing the 5.2 percent raise included in Biden’s transmittal. If enacted, the raise would take effect in January 2024.

“We must attract, recruit, and retain a skilled workforce with fair compensation in order to keep our government running, deliver services, and meet our nation’s challenges today and tomorrow. This alternative pay plan decision will continue to allow the federal government to employ a well-qualified federal workforce on behalf of the American people, keeping pace with prior wage growth in the labor market,” Biden concluded. ●

Cosponsors: 1 (R)

Bill Summary: Provides that all federal employees in the executive branch of the Federal Government are at-will employees

Most Recent House Action: Referred to the House Committee on Oversight and Accountability – May 5, 2023

Most Recent Senate Action: Referred to the Committee on Homeland Security and Governmental Affairs – May 9, 2023

Protecting Feds

H.R. 1301 / S. 640 – Federal Employees Civil Relief Act

FMA Position: Support

House Sponsor: Rep. Derek Kilmer (D-WA)

Cosponsors: 3 (D)

Senate Sponsor: Sen. Brian Schatz (D-HI)

Cosponsors: 15 (D) 1 (I)

Bill Summary: To suspend the enforcement of certain civil liabilities of Federal employees and contractors during a lapse in appropriations, or during a breach of the statutory debt limit

Most Recent House Action: Referred to the Committees on Oversight and Accountability, Financial Services, Ways and Means, Judiciary, Education and the Workforce, and House Administration – March 1, 2023

Most Recent Senate Action: Referred to the Committee on Finance – March 2, 2023

H.R. 1487 – Office of Personnel Management Reform Act

FMA Position: Support

Sponsor: Rep. Gerry Connolly (D-VA)

Cosponsors: 1 (D)

Bill Summary: Provides statutory authority for the mission of the Office

of Personnel Management (OPM), establishes the Chief Management Officer and a temporary Federal Workforce Advisory Committee, and specifies additional requirements for the appointment of the OPM Director and the removal of the OPM Director or Deputy Director.

Most Recent Action: Referred to the House Committee on Oversight and Accountability – March 9, 2023

Please be sure to visit the legislative action center on our website <https://fedmanagers.org/Legislative-Action-Center> to see the latest updates on the bills listed above and new legislation as it is introduced. Thank you for your membership in FMA. ●

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U.S. REPRESENTATIVE CHRIS PAPPAS (D-New Hampshire)

First elected in 2018, Chris Pappas, a native of Manchester, New Hampshire, represents the 1st congressional district of the state. In addition to Dover and Manchester, the district includes Portsmouth and many cities and towns that are home to FMA Chapter 6 (Portsmouth Naval Shipyard) – FMA’s Wolf Pack.

Pappas is a senior member of the House Veterans’ Affairs Committee and also serves on the Transportation and Infrastructure and Small Business Committees. From his seat on the Veterans’ Affairs Committee, Rep. Pappas works to hold VA leadership accountable and protecting those who have served the country in the armed services. He has also worked toward safeguarding VA benefits, protecting whistleblowers, and preventing fraud, waste, and abuse. Rep. Pappas’ stated priorities in Congress include improving access to health care, lowering the cost of prescription drugs, addressing the addiction epidemic, and protecting the environment and drinking water.

Prior to his election to Congress, Rep. Pappas served for six years as a member of the New Hampshire Executive Council from the 4th District, advising the Governor. Pappas also served two terms as the Treasurer of Hillsborough County, as well as two terms in the New Hampshire House of Representatives.

Pappas is a graduate of Harvard College, earning a Bachelor of Arts degree in government. He helped run and is now part owner of his family’s 100+ year old restaurant. Rep. Pappas married his boyfriend Vann Bentley in 2023. ●

THE FACTS:

Birthplace: Manchester, New Hampshire

Born: June 4, 1980

Education: Harvard University, B.A., 2002

Career:

- U.S. House of Representatives, 1st District, New Hampshire (2019-Present)
- New Hampshire Governor’s Executive Council (2013-2018)
- Hillsborough County Treasurer (2007-2011)
- New Hampshire House (2002-2006)

Elected: 2022 (3rd term)

Committees:

- House Small Business
 - Innovation, Entrepreneurship, and Workforce Development
- House Transportation
 - Coast Guard and Maritime Transportation
 - Highways and Transit
- Water Resources and Environment
- House Veterans’ Affairs
 - Disability Assistance and Memorial Affairs
 - Oversight and Investigations

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452 Cannon Office Building

Washington, DC 20515

Phone: 202.225.5456

Website: <http://pappas.house.gov>

U.S. REPRESENTATIVE JOHN RUTHERFORD *(R-Florida)*



Congressman John Rutherford represents Florida's 5th congressional district, which includes much of Jacksonville, Florida, as well as St. Augustine. He represents many FMA members, particularly at Chapter 11 (Fleet Readiness Center-Southeast) and Chapter 396 (Mayport Naval Base).

Rutherford serves on the influential House Appropriations Committee, where he sits on three subcommittees: Military Construction and Veterans Affairs; Homeland Security; and, Transportation and Urban Development. He also serves on the House Ethics Committee. He is a cosponsor of FMA-endorsed legislation including the Social Security Fairness Act (H.R. 82). During the Covid-19 pandemic, Congressman Rutherford also cosponsored a bipartisan bill to protect annual leave earned by feds, following a call with FMA leaders from Chapters 11 and 396. He is Co-Chair of the Bipartisan Working Group, and is also a member of many Caucuses, including the Defense Communities Caucus, the Main Street Caucus, and the Servicewomen and Women Veterans Caucus.

Congressman Rutherford had a distinguished career in Jacksonville law enforcement prior to his election to the House. He served as a patrolman in the Jacksonville Sheriff's Office and steadily rose through the ranks of Sergeant and Captain. He served as a sheriff's deputy and ultimately served as Sheriff of Duval County from 2003 to 2015. As Sheriff, Rutherford ran a 3,200-employee office and brought homicide and overall violent crime in Jacksonville to a 40-year low. Prior to his service he earned degrees in criminology from both Florida Junior College and Florida State University.

Rutherford and his wife of more than 50 years, Pat, have two children and four grandchildren. ●

THE FACTS:

Birthplace: Omaha, Nebraska

Born: September 2, 1952

Education: Florida Junior College, A.A., 1972; Florida State University, B.S., 1974

Career:

- Duval County Sheriff (2003-2015)
- Sheriff's Department Corrections Director
- Police Officer

Elected: 2022 (4th term)

Committees:

- House Appropriations
 - Homeland Security
 - Military Construction, Veterans Affairs, and Related Agencies
 - Transportation, Housing and Urban Development, and Related Agencies
- House Ethics
 - George Santos Investigation

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**MSPB SIDES WITH
EMPLOYEE IN
WHISTLEBLOWER CASE**

By Conor Dirks

Threatening a manager's job is always a big deal. And as the Merit Systems Protection Board found on August 24, 2023, that threat can be whistleblower reprisal, even if the manager has moved on to another agency.

A former Associate Deputy Assistant Secretary for Acquisitions of the Department of Veterans Affairs (VA), a member of the Senior Executive Service, made protected disclosures between 2009 and 2014. She claimed that her boss, the Deputy Assistant Secretary (DAS), retaliated against her. She alleged that he urged the VA Office of Inspector General (OIG) to investigate her and caused VA OIG to reach false conclusions about her procurement work on a government contract. And then, when she took a job at the Department of the Treasury, she alleged her former boss threatened to send VA OIG's report to her new employer and have her fired.

Treasury's OIG ultimately investigated the matter, too, but cleared the Senior Executive. What's more, Treasury OIG's report contained testimony from witnesses claiming the DAS had retaliated against the SES for her prior testimony against him in an Administrative Investigation Board (AIB), wielding his influence with the VA OIG against the SES. The report also called into question the "integrity" of VA OIG's process in this case. The spat between VA OIG and Treasury OIG spilled over into the pages of the New York Times.

After she was cleared by Treasury

OIG, the SES filed a whistleblower reprisal action against VA at the MSPB, through a vehicle called an Individual Right of Action (IRA) and requested a hearing. But the MSPB administrative



judge rejected the case without a hearing, finding that the VA OIG investigation's initiation, continuation, and ultimate report did not amount to a covered personnel action. The AJ also found that the SES's allegation that the VA had threatened to have her removed from her new job could not be a covered personnel action because the VA no longer had authority to remove her from her position at a new agency.

The SES appealed the AJ's determination to the full Board, which

was without a quorum from early 2017 to March 2022. On August 24, 2023, the Board ruled on her appeal.

First, the Board found that the DAS had the authority to take a personnel action, and that the SES had alleged that he had threatened to take one. Threats to take a personnel action in reprisal for protected whistleblowing are prohibited by the same provision of 5 U.S.C. § 2302(b) that prohibit actual retaliatory personnel actions.

The Board explained that the interpretation of "threat" in this context is broad, and that here, although the SES was no longer employed at the VA, the possibility of her being disciplined was high given the severity of the allegations substantiated by VA OIG.

The SES had also alleged that the DAS had told a colleague that he had "convinced the VA OIG to issue the December 2014 report, notwithstanding the VA OIG's stated intent to abandon its investigation after the [SES] left the VA, and that he was going to send the report to the Department of the Treasury because he wanted to ruin the [SES's] career and see her go to jail." The Board relied on this allegation, as well as Treasury OIG's report corroborating it, in finding that the SES had nonfrivolously alleged that the DAS "threatened" a personnel action, namely her removal from her Treasury position.

According to the MSPB, the fact that Treasury completely exonerated the SES and declined to carry out the threat from

continued on next page



the VA DAS was “not dispositive because whether a threatened action is carried out or not does not determine Board jurisdiction in an IRA appeal.”

The Board remanded the matter back to the Administrative Judge for a hearing on the merits. Now, the SES will have the opportunity to prove that her job was threatened, and a scathing report was issued against her, because of her protected disclosures. ●

Conor Dirks is an associate attorney at the law firm of Shaw Bransford & Roth, P.C., where he has practiced federal personnel and employment law since 2013. Conor is a graduate of Kenyon College and the Emory University School of Law. His areas of practice include federal personnel and employment law, GSA schedule legal services, federal agency legal services, security clearances, FOIA and Privacy Act, employment law training, and association law.



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John Q. Citizen

By Ben Neverov

The Social Security Administration (SSA) as we know it today was formed in 1946, replacing its first iteration, the Social Security Board. The Social Security Administration has a staff of 60,000 people across the country. The administration conducts its operations through ten regional offices, six processing centers, and 1,230 field offices. As of 2023, the Social Security Administration serves the interests of almost 67 million Americans monthly, with benefits reaching more than one trillion dollars this year. Over 76 percent of benefits are paid to retirees and their dependents, nearly 12 percent to the disabled, and 12 percent to surviving family members, mostly children.

Early History of the Social Security Administration

According to SSA, the pursuit of social insurance began on June 8, 1934, when President Roosevelt expressed his intention to Congress to provide a program guaranteeing economic security in the United States and created the Committee on Economic Security (CES). This decision came as the United States was in the midst of the Great Depression, and the majority of existing institutions in the United States had failed. In January 1935, the CES, following six months of research on economic insecurity in the United States, presented a legislative proposal to the president, who then passed it on to Congress. Following congressional hearings and overwhelming support on the floor, President Roosevelt



96 percent of those polled, regardless of political affiliation, said Social Security was ... [one of] the most important government programs.

signed the Social Security Act into law on August 14, 1935.

While the original Social Security Act did not meet its goal of a “comprehensive package of protection” it did provide two major provisions – grants for old-age assistance, and a social insurance program, which is what we now know as Social Security. The bill also created the predecessor to the SSA, the Social Security Board (SSB). The SSB was a bipartisan board, appointed by and reporting directly to the president, who would oversee these programs. More can be found about the first Social Security Board appointed by President Roosevelt here.

The Beginning of Social Security Numbers

The first task of the newfound SSB was to register employers and employees around the country, so they could begin recording their contributions for old-age benefits. Because it was still in its earliest stages, the SSB did not have the resources for such a large-scale operation, and therefore contracted the Post Office Department to distribute the applications. This joint operation with the Post Office resulted in the assignment of over 30 million Social Security numbers (SSNs) across the country, after which an appropriations bill provided the SSB with the necessary funding to establish an initial set of 151 field offices to take over the task of assigning SSNs.

While there is no record of the first ever issued Social Security number (SSN), the symbolic role was taken on by John David Sweeney, Jr. who was publicized as having received the

continued on next page

DID YOU KNOW?

first social security card. His was the first Social Security record officially established. However he did not receive the lowest SSN – that honor was granted to Grace Owen, of Concord, New Hampshire. Because she was the first applicant to Social Security in the state, Miss Owen received the lowest SSN ever issued, 001-01-0001.

The First Social Security Payments

Monthly payments from the Social Security system would not begin until 1940, and before then beneficiaries would apply for and be paid in single lump sums. The idea of these lump sums was to provide for beneficiaries who had contributed to Social Security but would not qualify for the upcoming system of monthly payments. This would give the SSB time to establish funds for these monthly payments and establish a minimum contribution for those who would receive monthly payments in the future.

The first applicant and recipient of a lump sum was Ernest Ackerman. Mr. Ackerman retired one day after the Social Security program began, during which he contributed one nickel from his pay, and received a payment of 17 cents on retirement. That nickel was and is the smallest payment ever made into Social Security.

The Economic Benefits of Social Security

According to Princeton Professor Paul Starr, Social Security is an absolutely necessary institution in the United States,

and has not only reduced poverty in old age, but also protects a large number of citizens from inflation. Professor Starr states that while the elderly used to have exceedingly high rates of poverty, the poverty rate of Americans over 65 has now been reduced to just ten percent, with the majority of their income being from Social Security. Professor Starr refers to Social Security as “the financial bedrock of their lives.”

The Center for Retirement Research at Boston College released a research



paper Authored by Laura Quinby, Robert Siliciano, and Gal Wettstein, observing the effects of Social Security as an economic stabilizer in local economies. The paper found that counties with larger shares of Social Security income were less economically susceptible to shifts in the state’s unemployment rates than those with a lower share of Social

Security income. This implies that sustained and improved Social Security benefits in a community may lead to a more stable economic environment, both for beneficiaries themselves and those participating in the local economy around them.

Disability Under Social Security

According to the SSA there are over 7.6 million disabled workers who receive benefits from Social Security Disability Insurance (SSDI), and an additional 1.2 million dependents. According to the Center on Budget and Policy Priorities, the SSDI is an essential component of the Social Security program, and provides vital benefits to disabled workers, despite being a smaller fund than the retired workers and survivors trust fund. The article states that without SSDI “nearly half of disabled workers would be experiencing poverty.” To this end, the SSDI program also provides work incentives, allowing beneficiaries to continue earning benefits while being able to work, thus supplementing their income in the case of future medical emergencies. This work by the SSA is essential as the administration’s data also shows that 65 percent of the private sector workforce does not have long-term disability insurance.

Public Support for the Social Security Administration

The Social Security Administration has maintained widespread bipartisan support over its 85 years of operation. A survey

from AARP found that “96 percent of those polled, regardless of political affiliation, said Social Security was either the most important government program or an important one compared with other government programs.”

Since its inception as the Social Security Board in 1935, the SSA has been operating for 88 years and has grown to be one of the most popular and recognized federal agencies in the United States. Its 60,000 employees serve over 67 million Americans who receive Social Security benefits every month. Their work continues to actively combat poverty in the United States while pursuing the Social Security Administration’s original goal of economic security in the country. ●



Ben Neverov was FMA’s 2023 Summer Intern and is a student at William & Mary University.

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RETIREES



RETIREMENT MATTERS

By Christine Parker

Fellow FMA members, and prospective members,

Thank you for reading what I have to share with you about federal retirees and our retirement benefits. There are many topics that affect retirees. This article is by no means all-inclusive. Keep an eye on your e-mail, and the FMA website at www.fedmanagers.org. If you ever have questions on where to find information, or about pending legislation, feel free to contact me, or Greg Stanford at the National Office.

2024 Federal Retiree COLA Announced – FERS / CSRS / Social Security

The 2024 federal retiree cost-of-living adjustment (COLA) will be 3.2 percent for those under the Civil Service Retirement System (CSRS) and 2.2 percent for those under the Federal Employees Retirement System (FERS). This is smaller than the 2023 COLA which was the largest in nearly four decades. In 2023, the COLA for CSRS retirees was 8.7 percent and 7.7 percent for those under the FERS retirement system.

You can read more about COLA at this link: <https://www.myfederalretirement.com/fers-csrs-cola-watch/>.

IRS Postpones Mandatory Roth Catch-Up Retirement Contributions Until 2026

The retirement plan world is breathing a sigh of relief after the IRS announced on August 25, 2023, a two-year hold on

as the Roth TSP account. This rule, under Section 603 of the SECURE Act 2.0, was supposed to have taken effect on January 1, 2024. Read more details here: www.myfederalretirement.com/irs-roth-catch-up/.

Making a Choice for Life Insurance Can Be Confusing. Requirements & Choices to Maintain FEGLI Optional (A, B, C) Insurance in Retirement

A federal employee who is enrolled in the FEGLI basic insurance (the Basic Insurance Amount or BIA) and Option A, Option B, and/or Option C, can continue enrollment in the FEGLI BIA and one, two, or all three of the optional coverages when he or she retires

if the retiring employee meets all of the following requirements:

- The employee is entitled to retire on an immediate annuity under a retirement system for civilian employees. Retiring on an immediate annuity includes the FERS “MRA+10” and the FERS “MRA+20” immediate retirement option.
- The employee has been continuously insured for the five years of service ending on the effective date of the employee’s retirement, or for the full period(s) of service during which the employee was eligible to be insured if less than five years in the FEGLI BIA,



requiring high-income employees who make contributions to qualified retirement plans (including the Thrift Savings Plan), be made to Roth Accounts only.

A provision coming out of SECURE Act 2.0, passed into law in December 2022 requires that “catch-up” contributions for employees aged 50 or older whose Social Security wages for the prior year exceed \$145,000, must be made to a Roth retirement account, such

continued on next page

and Option A, Option B, and/or Option C. This is called the “all opportunity” requirement.

- The employee is enrolled in the FEGLI BIA, Option A, Option B, and/or Option C on the day of his or her retirement.

- The retiring employee did not convert his or her FEGLI life insurance coverage into an individual policy.

Note the following: (1) An immediate (CSRS or FERS) annuity is one that begins within 30 days after the date the employee separates from federal service; and (2) Any other life insurance an employee’s agency may offer in addition to, or in lieu of FEGLI, does not count toward the five-year requirement. Only FEGLI coverage counts for meeting the five-year requirement.

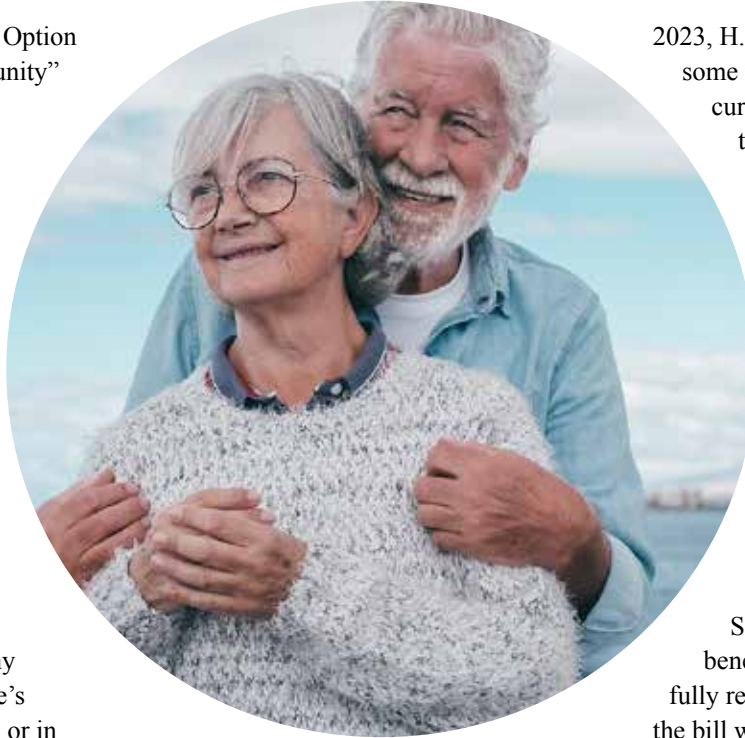
More details are here: <https://www.myfederalretirement.com/fegli-optional-retirement/>.

Windfall Elimination Provision and Government Pension Offset

Yes, it is still out there. Communicate with your Congressperson to request his/her support for these proposed bills.

In January 2023, Reps. Garrett Graves (R-LA) and Abigail Spanberger (D-VA), and Sens. Sherrod Brown (D-OH) and Susan Collins (R-ME) introduced the Social Security Fairness Act, H.R. 82/S. 597, which would fully repeal the Windfall Elimination Provision (WEP) and Government Pension Offset (GPO).

In June 2023, House Ways and Means Committee Ranking Member Richard Neal (D-MA), introduced the Public Servants Protection and Fairness Act of



2023, H.R. 4260, which would provide some relief from the WEP for both current and future retirees. While the legislation does not fully repeal WEP, it represents a significant improvement over the status quo for the Civil Service Retirement System (CSRS) retirees unfairly penalized for their public service.

In July 2023, Rep. John Larson (D-CT) and Sen. Richard Blumenthal (D-CT) introduced the Social Security 2100 Act, H.R. 4583/ S. 2280, which would fortify the Social Security program and expand benefits. Most notably, the bill would fully repeal WEP and GPO. In addition, the bill would increase the average Social Security benefit, improve cost-of-living adjustments, index Social Security wage levels, and more.

We continue to witness unprecedented changes in our nation. Stay informed on FMA’s legislative issues, and engage with your Congress people. Don’t be a bystander.

As always, I welcome your feedback, questions, and input for articles. Please send your thoughts or questions to FMA121Parker@gmail.com.

The 2024 COLA will be 3.2 percent for CSRS retirees and 2.2 percent for FERS retirees.

Make Your Voice Heard! Use your vocal freedom as a retiree to speak up and get involved. Check out the Legislative Action Center on the FMA website. Take the time to send Action Letters to your Representative and Senators – the effects are worth it. Use the FMA website to easily send your communication to Capitol Hill: <https://fedmanagers.org/Action-Letters>. And make sure to visit your elected representatives at their local offices or schedule a virtual meeting. ●

Christine Parker is FMA’s Retiree Conference Chair and National Treasurer.

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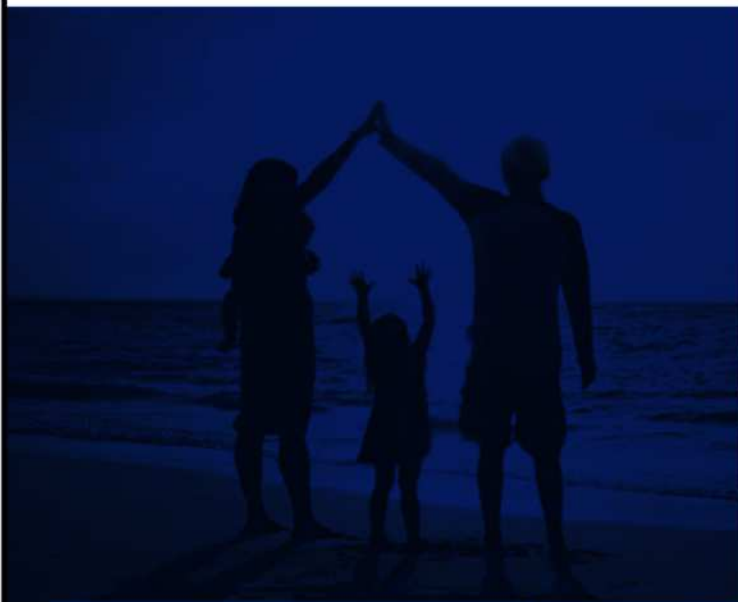
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