



# FRONTLINE

Issue 32

June 2010

## Special Interest Articles:

- SSA's 75<sup>th</sup> Anniversary
- Around the Regions
- Who is Frank Baitman?
- The Sandwich Generation in SSA

## Issue Features:

[NCSSMA Committee](#) 3  
(Staffing and Training)

[President's Corner](#) 4

[Around the Regions](#) 5

[TSC Connection](#) 6

[Profiles Page](#) 7

[75<sup>th</sup> Anniversary](#) 9

[Sandwich Generation](#) 10

[Annual Meeting](#) 12

*"The most gratifying for me was the opportunity for a face to face visit with Chairman Pomeroy and his aides... His questions proved to me that he was interested, he was engaged, and he wanted to know what we required to better serve the public."*

Monique Romero, District Manager, New Iberia, LA

## National Council of Social Security Management Associations, Inc.

### NCSSMA CAPITOL HILL DAY

Have you ever wondered what takes place during the Capitol Hill visits that the NCSSMA Executive Committee (EC) does once a year? What is the purpose of these visits? If you answered yes, you are not alone. Although NCSSMA has approximately 3400 members, most know very little about what NCSSMA does on the Hill. Until recently, I too wondered why NCSSMA representatives made the trip to Washington, DC and what events took place during these Capitol Hill Day visits. I also wondered who makes the trip, whom do they visit, and what is discussed? I set out on a fact finding mission to discover the answers.

The NCSSMA EC led by President Joe Dirago coordinates with Washington Representative Rachel Emmons and Grassroots Coordinator Rick Warsinskey to establish legislative priorities for the year. The NCSSMA EC Officers conduct numerous meetings throughout the year with congressional members and staff to communicate these priorities. Capitol Hill Day is an integral part of that effort. These visits are scheduled so that NCSSMA EC members meet with Members of Congress and their staff after the President's Budget Request has been submitted to Congress, but prior to any action by the Budget Committees on the Budget Resolution or by the Appropriations Committees on the Labor, Health and Human Services, Education, and Related Agencies Appropriations bill. The timing of the Hill visits is important and allows NCSSMA the opportunity to present legislators with our perspective and provide them with valuable frontline feedback before decisions are made regarding the agency's budget.

Capitol Hill Day primarily involves members



of the EC, but occasionally general members participate. All members utilize annual leave for this purpose. While there, they provide background information on the NCSSMA organization, who our members are, and what important issues field offices and teleservice centers are currently facing. They utilize this time to provide information regarding SSA's appropriated funding needs and NCSSMA's perspective concerning current legislation being considered by Congress.

During the most recent visit on March 17, 2010, over 60 meetings were held in one day and included meetings with staff that work for the various Congressional Committees and Subcommittees such as: House and Senate Budget Committees; House Ways and Means Committee – Subcommittee on Social Security; Senate Finance Committee; and House and Senate Labor, Health and Human Services, Education, and Related Agencies Appropriations Subcommittees. This year's visits focused on the FY 2011 Budget Request – specifically on the Limitation on Administrative Expenses (LAE) account which is included in the Labor, Health and Human Services, Education, and Related Agencies Appropriations bill. NCSSMA presented a four-page document that provided both background and analysis of the FY 2011 President's Budget Request for SSA. This document also outlined ten key points in support of additional resources for

*(Continued on page 2)*

## Capitol Hill Day continued

field offices. Workload trends from FY 2004 through FY 2009 were shown in a series of charts that detailed workload category percentage shares, number of visitors to Social Security field offices, and field office staffing levels during this period. Members of Congress were also provided copies of NCSSMA's 2010 Survey of Management and a one-page background document on NCSSMA and its mission.

NCSSMA members making their first visit to the Hill in March included: Dwight Moberly, Rick Lenoir, Andrea Wahle, Monique Romero, Joan Arnold, and Debbie Banikowski. When asked what their initial thoughts were regarding the Hill visits, the consensus from the group was that of being surprised by the reception of each Congressional office they visited and the level of knowledge the staffers have about what we do in Social Security. They now see how beneficial the Hill visits are for NCSSMA and its frontline members. Rick Lenoir sums it up best by stating: "I did not realize how receptive Congressional and Senatorial staffs would be. Equally surprising, in a number of instances, I was pleased to see just how knowledgeable they were about what we do and what we need." This year's group meeting with Chairman Earl Pomeroy, Democrat-At Large-ND, of the House Subcommittee on Social Security was the highlight of their visit. He was very appreciative of the information provided by NCSSMA EC members and knowledgeable about the agency's priority to clear disability backlogs. Monique Romero emphasized this by stating: "The most gratifying for me was the opportunity for a face to face visit with Chairman Pomeroy and his aides. He listened to our pleas about staffing and the budget. His questions proved to me that he was interested, he was engaged, and he wanted to know what we required to better serve the public."

All NCSSMA representatives making the trip briefed

Congressional Representatives and their staff regarding the current situation in their own respective offices. This is of great interest as the EC member is often not only a constituent of the Member of Congress, but his or her office also provides service to other constituents



as well. Many times the NCSSMA EC member works closely with staff members for the Member of Congress in the district or state they represent. The purpose of making this more "personal" connection is to focus the interest of the Member of Congress and their staff on the budget issue and other issues of significance at the local level in addition to the national level. Rachel Emmons, NCSSMA's Washington

Representative, states: "Often times the issue at the national level is hard to put your arms around – but if we can successfully pare it down to the local level and give the Congressional office 'ownership' of it, we can make more progress." Rachel and her staff coordinate and organize a master schedule for the whole day and are responsible for scheduling the meetings. They oversee the coordination of several "group" meetings throughout the day. They brief the NCSSMA EC members on what to expect at the meetings, provide them with biographical information for each of the Members of Congress they will meet with, a map of the Capitol Hill area, and provide insight and coaching on what to do. Finally, they make it a point to accompany the NCSSMA members who are visiting with their Members of Congress for the very first time and to attend as many of the over 60 visits as they can.

Bethany Paradis, former NCSSMA Vice President and Executive Officer, who has attended several Hill days described it this way, "Each NCSSMA member has several meetings to attend throughout the day which often entail racing from one side of Capitol Hill to the other and back again. Traditionally meetings were scheduled in June when it is often hot and muggy in D.C. Now imagine your representatives in business suits and dress shoes racing back and forth across Capitol Hill and you can see how dedicated Rachel and her staff are as they try to attend as many of these meetings as they can. I thought that 5 or 6 meetings was a busy day--they are amazing in action!"

Although the purpose and agenda for the Hill visit in March was to provide support for the President's FY 2011 Budget Request for SSA, there are many interests competing for federal funding in this current budget environment. NCSSMA is one of the most active organizations in advocating for adequate resources for SSA. The NCSSMA Capitol Hill Day meetings are an opportunity to present the strongest case possible to help ensure that SSA receives the resources the agency needs through the annual appropriations process. By presenting the case on both the national and local levels NCSSMA works to gain support for SSA's budget.

NCSSMA's Capitol Hill visits kick off our grassroots campaign for the year which is critical to our success as an organization. Grassroots activities were utilized effectively in the past on issues other than funding for SSA. For example, last year our grassroots activities were effective regarding the passage of the FERS Sick

*(Continued on page 3)*



**Capitol Hill Day continued**

Leave provision thus exemplifying just how beneficial these visits by NCSSMA are.

Joe Dirago, NCSSMA President, was highly complimentary of the efforts of Greystone Group, as well as the entire 20 member NCSSMA delegation that participated in Capitol Hill Day visits. The fact that the Social Security Subcommittee convened a hearing on SSA Field Office Challenges on April 15 indicated that NCSSMA's message and concerns resonated on Capitol Hill.

The NCSSMA Hill visits have proven to be beneficial for many key issues affecting the agency. They help to forge an ongoing working relationship with our Congressional Representative enabling us to provide important information they need to make effective decisions. In conversation with the EC members that attended this year's visits, I found that they were very knowledgeable, passionate about the issues at hand, and excited to have been a part of the process. Special thanks to all the NCSSMA members who donate their time to make Hill visits on behalf of all the managers and supervisors of the Social Security Administration.

**NCSSMA Training and Staffing Committee**

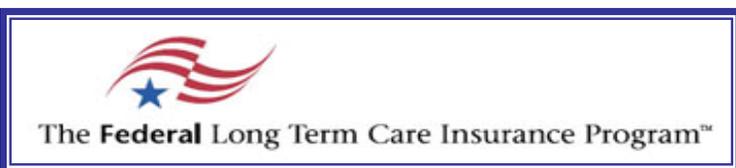
The Staffing and Training Committee is one of the most dynamic of the NCSSMA standing committees. We are the folks who put together all the surveys of management, including designing the questions, drawing conclusions related to the responses, and preparing the final reports. We just wrapped up a Survey of Management in February 2010 and almost immediately after that, we started designing the first ever Survey of TSC Management. TSC managers have told us in the past that not all the questions on our Survey of Management apply to the TSCs, so we decided to design a separate survey targeted at determining the specific needs and concerns of TSC management. Considerable effort went into the design of the TSC Survey, which ended June 1<sup>st</sup> and the committee is now doing the back-end analysis to prepare a report.

Our committee, which has a member from each region, does a lot more than collect data through surveys. We were also assigned 3 resolutions from the 2009 NCSSMA national meeting to work on related to staffing and training. The training aspect of the committee looks at all issues related to training—initial technical training, management training, and in-service training. A few years ago, we became heavily involved in reviewing IVT presentations and we provided regular feedback to the Office of Learning (then called Office of Training) that helped to improve the quality of IVT presentations. Each of the regional representatives on the committee would welcome your feedback and suggestions on any and all aspects of the training process. If you have any ideas or concerns relating to training please contact your regional representative shown below:

- Donna Abbott, NESSMA
- Robin Bello, NYRMS
- Jill Russell (Committee Chair), PRMA
- Bob Flournoy (Deputy Chair) and Mark Keeton, ARMA
- Bobby C. Reynolds, CSSMA
- Deborah Foster, DRMA
- Lori Dalton, DRSSMA
- Shirlene Atkinson, KCMA
- Fred Lopez, NWMA
- Marv Mueller, SFRMA
- Sharon Gutierrez, TSC Representative

**FrontLine is Produced by the Communications Committee**

- Bethany Paradis (Chair), Albert Alvarez
- Thomas Biggar, Fred Bourjaily
- Jewell Colbert, Susana Diaz
- Patty Maddox, Virginia Schroder
- Brian Simpson, Jan Still
- Eric Williamson



## President's Corner: NCSSMA Testimony at Social Security Subcommittee Hearing on Field Office Service Delivery – My Reflections!

Joe Dirago, NCSSMA President



Joe Dirago, Congressman Earl Pomeroy and Billie Armenta

Testifying in front of Congress on behalf of NCSSMA was a unique opportunity and a tremendous challenge! NCSSMA Secretary Billie Armenta and I had that experience on April 15, 2010, at the House Ways and Means Social Security Subcommittee hearing on Social Security Administration (SSA) field office service delivery.

The Acting Chairman of the Social Security Subcommittee, Congressman Earl Pomeroy convened the hearing to explore how SSA is planning to meet the goals set before the agency in light of the level of resources received and the surges in workloads due to the recession and the aging of the baby boom generation. In announcing the hearing, he stated, “the Social Security Administration (SSA) was right to prioritize reducing the disability claims backlog, but I am concerned that other services that SSA provides to the American people are not getting sufficient attention and resources. I am interested in knowing what steps SSA is taking to address these other growing and backlogged workloads, and how the Subcommittee can be instrumental in making sure that SSA is once again able to provide the top-notch customer service the public deserves.”

Since NCSSMA received a request to testify only about two weeks before the hearing, countless hours were spent drafting and editing our Written Statements for the Record. Our intent was to provide a direct and honest portrayal of the challenges confronting our SSA field offices everyday. The Statements for the Record, produced with the invaluable assistance of NCSSMA Past President Rick Warsinskey and Washington Representative Rachel Emmons, provided detailed information about service delivery challenges and are supportive of our cause.

Our actual oral testimony at the April 15 hearing was a highly anticipated event that allowed NCSSMA to focus attention on the current situation in our 1,300 field offices and to communicate our views. Of course the hearing setting in front of a panel of Congressional representatives, with an audience of advocates and interested parties behind you and television cameras filming, was quite intimidating.

Chairman Pomeroy opened the hearing with a statement reminding everyone of the important role that the Social Security Administration plays in the lives of many in this country. He also stated he is worried about the experience that many are having with SSA, as over the past decade the budget for SSA's administrative funding has not kept up with the increases in the workloads.

During Ranking Member Sam Johnson's initial remarks he focused on the role SSA plays as a vital safety net for many millions of retirees and individuals with disabilities. He added that there are many different ways of doing your business, such as the Internet, or over the phone, but many still like to do it face-to-face, and that is where the SSA field offices come in. Mr. Johnson stated, “The good folks at local field offices are not just the face of Social Security but they are literally on the front lines.”

In my opening statement I explained that NCSSMA represents over 3,400 Social Security managers and supervisors and for over forty years, our top priority has been a strong and stable Social Security Administration that delivers quality community based service. Despite agency strategic planning, expansion of SSA online services, significant productivity gains, and the best efforts of management and employees, SSA field offices are faced with tremendous challenges.

I cited figures to illustrate our soaring claims receipts and the increasing numbers of visitors and telephone calls pouring into field offices. I explained that while online services are helping, Internet claims are still a field office workload. A key part of my testimony focused on the high busy rates for field office telephone service and concerns about the quality of our work. I used information compiled from our 2010 NCSSMA Survey of Management to illustrate these issues. I also outlined several suggestions to help address the challenges being faced by field offices.

*(Continued on page 5)*

## Presidents Corner *continued*

I thanked the Subcommittee for the increased funding SSA received the last 3 years and indicated that NCSSMA was very supportive of the President's FY 2011 budget request for Social Security. I pointed out that the \$13.1 billion in LAE funding in the Commissioner's proposed FY 2011 budget would have eliminated most of the backlogs, improved telephone service, addressed program integrity, and yielded significant improvement in service. In conclusion, I said that field offices are the service delivery engine of the Social Security Administration, and our staffs are highly committed to serving the American public, but we must have the necessary resources to do so.

Billie Armenta then provided testimony that illustrated how field offices are faced with a multitude of service delivery challenges, whether urban, suburban, border, or rural. Regardless of location, the Social Security field office is one of the bedrocks of the community, and employees are highly dedicated, but we need the necessary support to meet our challenges.

Also testifying at the hearing were representatives from the Government Accounting Office (GAO), AFGE and the Office of the Inspector General (OIG). Following the testimony of the witnesses on the first panel, Commissioner Astrue testified on the second panel and responded to questions from the Subcommittee.

This hearing is just one in a number of steps that will assist NCSSMA with achieving the goals it has set forth regarding field office and teleservice center resources. The comments on hiring and resources made by the Chairman, the Ranking Member, and other Members of the Subcommittee clearly indicated that they heard our message about the challenges confronting SSA field offices.

In the few weeks that followed the hearing, NCSSMA Vice President Steve Clifton, Billie Armenta, Rachel Emmons, and I met with the Social Security Advisory Board Staff, the Commissioner, the National Association of Disability Examiners (NADE), and key members of Congressional Authorization and Appropriations Committee staff to advance our issues. The NCSSMA Executive Committee and I will continue to advocate for the appropriate SSA funding in FY 2011 and work hard on your behalf.

I encourage you to go to our website at [www.NCSSMA.ORG](http://www.NCSSMA.ORG) to view NCSSMA Legislative Report 03-2010 for more information about the hearing. Links are also provided for our testimony and you can even view a video of our oral testimony.

## Around the Regions

*In each edition we will share reports from some of the regional management associations in this column.*

### KCMA

The Managers in the Kansas City Region continue to work together to help each other and are also helping some offices in the New York Region by taking telephone appointment retirement claims. We are continuing our plans and looking forward to hosting the national meeting scheduled for the first week of October 2011. The Kansas City Management Association (KCMA) will be meeting with Regional Office executive staff on July 22, 2010 as we continue our dialogue and excellent working relationship.

At the end of July 2010, KCMA loses a longtime member and leader of KCMA, Jim Hughes. Jim started with the agency in 1973 and joined the management association in 1982. He has served as Area Representative, was elected to two terms as KCMA President, and also served as Vice President. Jim attended his first national meeting held in San Juan, Puerto Rico during the time we were implementing the 800# and our commissioner was Dorcas Hardy. In both 1991 and 2001, Jim chaired the national meetings held in St Louis. If Jim was involved with a meeting, you could plan on a great meeting, good food, and being under budget. To this day, Jim loves Irish music because of an evening out in Boston with the New York delegation, involving a famous Irish establishment, the Black Rose. Jim has attended 11 NCSSMA national meetings and was always impressed by the passion, intelligence, and integrity of the Executive Council. Jim noted proudly "We followed the practice to 'Always try to do the right thing'. The work I did with KCMA and NCSSMA is the work that will stay with me far more than implementation of PACS or any of our other initiatives that I participated in as a manager and supervisor."

KCMA wishes Jim a happy retirement and thanks him for his service.

Pete Jaudegis, President, KCMA

### PRMA

Everyone in the Philadelphia Regional Management Association is looking forward to our next annual meeting which will be held in Annapolis, MD the last weekend in July. In addition to our internal meeting and elections of officers, we plan to have a meeting with our Regional Commissioner and her staffers. National President Joe

*(Continued on page 6)*

## Around the Regions continued

Dirago and Washington Representative Rachel Emmons will be speakers as well. We all are looking forward to our annual banquet (costumes optional) and awards ceremony. Several of our retirees are planning to attend. The executive committee of the PRMA met on April 30, 2010 with our Regional Commissioner, Laurie Watkins, to discuss a variety of issues of mutual concern. We always enjoy the lively exchange of ideas that occur at these meetings between RO executives and PRMA officers and delegates.

Second Vice President Rita Hobson is on maternity leave after giving birth to baby girl Sarah in February. Acting as Second VP until Rita returns is Charlene Morales, who was a former PRMA and NCSSMA treasurer.

Rita Alexander, President PRMA

### CSSMA

The Chicago Social Security Management Association completed a full region wide survey of our membership earlier this spring. From all accounts this was the first time in at least 10 years that our organization attempted to take a region-wide snapshot of CSSMA members via survey. Members of our executive committee led by Vice President Darrin Salzman are tabulating and evaluating the responses. We should have a summary of the findings shortly.

Our executive committee met in April to discuss a number of issues both regional and national. One of our regional initiatives for 2010 is to not only increase the number of members for our organization but also to increase the level of involvement and participation of our members going forward. Although CSSMA will not be hosting a full annual meeting this year, plans are under way to conduct an expanded executive committee session later this summer. We have also begun the process of planning our 2011 Annual Meeting which we are moving to the spring based on the feedback of our members.

Rick Lenoir, CSSMA President

**We welcome your letters, stories, comments, editorials or suggestions for future articles.**

**Send your feedback to:  
Bethany.Paradis@ssa.gov**

## The Teleservice Connection by Brian Russell, TSC Representative



On June 1, 2010, we closed the response period for the first ever NCSSMA TSC survey. The survey was designed to hear your concerns about your staff, work environment and your own development. Over the last few months, many NCSSMA members devoted time to draft this much needed survey. Thanks go out to the following individuals and groups for their efforts to make this possible: the TSC Committee for their ideas; Jill Russell, Bob Flournoy and the Staffing and Training Committee for taking ideas and turning them into a great survey; Dean Dal Ben who was instrumental in working to finalize the survey, construct the website and deliver the final data; Rick Warsinskey for his crucial input in the development process; and Joe Dirago for his leadership to advance this project.

Also, I want to extend a big “thank you” to all the TSC managers and supervisors who took time out of their busy days to share their perspective through the survey. For this survey, we asked members and non-members alike for their input, because we wanted to hear from as many of you as possible. We had a great turnout, almost 80%. This level of participation makes your collective voice very strong. Many hours of work went into this survey because NCSSMA is very interested in knowing your perspective and is highly committed to the mission of being an unfiltered voice for your concerns.

Toward that end, NCSSMA will take the survey results to SSA executives and constructively engage in representing you. In the near future, we will finalize the survey results in a report that we will post to the NCSSMA website. Stay tuned for these coming developments.

Once again, thanks to all of you for sharing your perspective with us.



## Profiles Page Featuring Frank Baitman, Chief Information Officer

*Welcome to our series of ongoing conversations designed to enable our membership and other interested readers to get acquainted with members of the executive staff in Central Office. In this edition we explore the Office of the Chief Information Officer as we talk to Frank Baitman who recently became SSA's new Chief Information Officer.*

### **What are the most significant changes that you foresee for Social Security's public online presence in the next 5 years?**

Authentication is at the core of a stronger online presence for Social Security: when we can have confidence that *you are who you say you are*, we can share more information with you. A meaningful exchange of information between Social Security and members of the public is a prelude to creating an online experience that is as positive as that which we offer today in our field offices and through our 800-SSA-1213 call centers. Our new authentication process will enable Social Security services, such as benefit verification and replacement Social Security Cards, to migrate to the Internet. By moving these services to the Internet, we enable the public to do business with us through the channel they're most comfortable with – field office, telephone, or the web – and give our staff more time to deal with the more complex cases that benefit from in-person visits.

### **What is the biggest challenge currently facing SSA's IT area and what is OCIO currently doing to address it?**

One of the major challenges that we face is modernizing our core systems. Social Security has been using information technology for a long time! While we've enjoyed the benefits of IT since the 1950s, we still have many legacy systems that aren't as effective in meeting our service challenges in 2010, as newer systems could be. Developing a strategic roadmap that enables Social Security to migrate to a modern architecture is among our highest priorities. But technology should only *support* the agency's business objectives – not drive them – which is why we're first developing Social Security's new Agency Strategic Plan.

### **Are you adequately funded to address SSA's IT concerns?**

We have recently been looking at Social Security's current IT spending from a number of angles, and that's allowed us to better understand whether these investments are moving us forward towards our modernization goals. It turns out that older systems are quite expensive to

maintain and modify, and these costs are consuming a disproportionate share of our annual IT expenditure. Thus, Social Security's IT funding is adequate to support ongoing operations and to make incremental headway on updating our existing systems. But, the current level of funding won't allow us to undertake the major modernizations we need to deliver robust services across all service channels. Once we've made progress on building our strategic roadmap, we'll determine what resources will be required for modernization and have those discussions with the Office of Management and Budget.

### **What is the current level of development for our Internet authentication process?**

We're well on our way to developing a single authentication solution for Social Security: once you've gone through the authentication process to create a credential, you'll be able to re-use this credential to do any type of business online with Social Security. To get to this point, we have conducted extensive market research, benchmarking, and public focus groups and surveys to develop an authentication process that is in line with industry standards and looks and feels like other authentication processes the public is accustomed to. We've also been working with interagency workgroups to ensure that Social Security's authentication solution provides the security required by federal oversight agencies. Using this research, Social Security is finalizing requirements for the authentication system and we plan to have it in place in early 2011.

### **What can you tell us about the status of Health Information Technology?**

Social Security is at the forefront of Health Information Technology (HIT) and we play a major role in the development of HIT strategy, vision, and standards through our participation on the Office of the National Coordinator workgroups. Social Security is also working closely with the Department of Veterans Affairs and the Department of Defense to establish an interagency exchange process to help with the efficiency and quality of medical decisions for our Wounded Warriors.

Our commitment to HIT development was highlighted in February 2009, when Social Security became the first federal agency to successfully request and receive medical information over the Nationwide Health Information Network (NHIN), through a pilot program in Massachusetts.

*(Continued on page 8)*

## Frank Baitman continued

### ***What role do you see social media, i.e., Facebook, Twitter etc., play in the openness/transparency of government?***

Many citizens unfortunately see government agencies as impersonal, causing them to mistrust government. At the same time, we've seen how companies have embraced social media to better connect with their customers. In a similar fashion, government can employ social media to better communicate with its citizens, and enter into a dialog that achieves many of the democratic goals that the founders of our nation intended. By actively, authentically, and transparently participating in social networks such as Facebook and Twitter, a new breed of agency ambassadors has the opportunity to humanize government and open new lines of communication with the public. The new model might be best termed, "government with the people."

### ***Can you talk about the structure you have established in the OCIO and the role each of them will play?***

We have created a structure in OCIO with five groups that support one another's goals. One way I like to look at the organization is with the Office of Information Security and the Office of Open Government at our core. Both are public facing, and an acknowledgement that that's why we're in business. Security is fundamental to our mission: Social Security is a data centric organization, and an effective IT security program is recognition of the public's trust in sharing their most private, personal data. Open government fosters an informed and engaged public, aware of Social Security's mission and the business processes we've developed to run Social Security and Supplemental Security Income programs.

Our other three groups concentrate on how Social Security carries out its mission. The Office of Innovation focuses on building a culture that values continual improvement; through experimentation, they will be introducing innovations to our business processes. The Office of Investment Management ensures that we are using information resources effectively, managing the agency's IT investment process. The Office of Vision and Strategy develops the agency's technology roadmap, bridging today's enterprise architecture with a strategic vision that ensures our systems will support tomorrow's workloads.

### ***Can you tell us a little about your private sector experience and how it relates to your vision for Social Security?***

I have spent much of my career working with emerging technologies, exploring opportunities for them to upend business processes and alter the economics of industry. This has given me a vantage to observe the transformative potential of technology. Since the rise of the Internet, we have seen a couple of waves of business transformation inspired by technology; businesses have had to adjust to a changing landscape in order to remain competitive and relevant.

While government has invested in technology – sometimes heavily – we have not yet undergone the same fundamental transformation that has affected everything from banking to retail.

There are some key lessons I've learned from industry's *e-business* transformation over the previous decade. For example, when the shiny new system is far superior to the current way of doing business, we have a tendency to want to build the perfect system – loading it up with thousands of requirements. Unfortunately, grand projects fall far short of 'perfect', and consume huge resources. The best approach is to "do it right, but start small"; a well-executed system will magnetically attract adopters and added functionality!

Another lesson from industry has been the importance of design and usability. Systems that are easy to navigate reduce employee errors; and, customer-facing systems that are clean and simple are most successful. Google's unadorned aesthetic was in stark contrast to the busy web sites in the late 1990s, but now with 300 million searches per day, its success is indisputable! Design simplicity – whether on the web or on government forms – is an especially difficult objective, but it offers one of the most compelling benefits to those who achieve it.

Between pressure on the federal budget and the path that private industry has cultivated, I believe we are now poised for an *e-government* transformation, in which we re-think our business processes, improve service delivery, and ultimately, do so with fewer taxpayer resources!

## SSA Celebrates 75 Years of Service

August 14, 2010 marks the 75<sup>th</sup> anniversary of the signing of the Social Security Act. Soon after the Act was signed, the Social Security Board started creating the structure of the new agency with the establishment of twelve regional offices. The first field office (shown in the picture below) opened in Austin, Texas on October 14, 1936.



On November 4, 1936 seven additional offices followed. Others quickly opened. By February 1937, there were 100 field offices operating across the nation and by July 1937 SSA had 173 field offices.

The first field offices were small. The staff consisted of a manager and 1 to 3 field assistants and in some locations a secretary. Training of new field assistants took place in the Washington, DC headquarters. Training lasted four weeks and consisted of studying the Social Security Act and related documents. The first training class began October 5, 1936 with another beginning October 17 of that year. Additional classes followed frequently as more offices opened.

The work consisted mainly of enumeration and personal contacts with employers to answer questions about the new program and to identify those possibly eligible for the lump sum payment. There were a few lump sum claims filed by those who reached age 65 or by the widows of deceased workers. The field offices took the claims and related documents then sent them to headquarters to be adjudicated.

In 1940, field offices began taking claims for monthly benefits. That year 255,000 claims were awarded.



*Ida May Fuller of Vermont was the first person to receive a Social Security check.*



On September 15, 1941 the claim adjudication function was decentralized with field offices assuming responsibility for reconciliation of wages, development of claims, and computations. Final adjudication of the claims still took place in headquarters. In 1942, area offices were established for certification and recertification of claims. Adjudicative functions were shifted to the field offices with the area offices reviewing all claims. Area offices later became known as payment centers. Claims workloads grew dramatically in the early 1940s. By August 14, 1944 the one millionth beneficiary had been awarded.



*Mrs. Mary Thompson, a widow, was the 1 millionth Social Security beneficiary.*

Growth in claims and field office duties resulted in increases in staff and the creation of new positions. The 1950s brought expansion of benefit categories, changes in entitlement criteria and the introduction of Disability Benefits. Field offices continued to grow in size and workload responsibility. The increase in size and responsibility also created additional regional office positions. Field office managers no longer reported directly to the regional directors, but to positions that are today known as Area Directors.

The 1960s saw the passage of the Medicare Program which further increased the field office staff and responsibilities. The service representative position was added to handle primarily Medicare workloads. In the late 1960s, management associations were being formed in

*(Continued on page 10)*

## SSA Celebrates 75 Years *continued*

the individual regions. Then in 1969 the National Council of Social Security Management Associations (NCSSMA) was established to unite the regional associations to speak as one voice at the national level. The increase in numbers of field offices and in the administrative layers between the field office managers and those making policy decisions in SSA was a significant factor in the creation of the regional management associations and ultimately NCSSMA. As stated in the founding documents the purpose of the organization is to provide the unfiltered voice of field office management to the agency policymakers.

In 1974, SSI came into existence resulting in the hiring of a large number of new Claims Representatives. Total full time permanent employees for the agency peaked in 1977 at 80,014. In 1978, field offices reached their peak with 1349 offices in existence and 39,019 full time permanent employees.

An SSA systems modernization plan presented the management associations with a major concern in the 1980s. NCSSMA wanted to preserve the high quality community based service for which SSA had long been known in the face of a 21% staff reduction (17,000 positions) coming primarily from field offices. Management association leaders at the national and regional level were instrumental in bringing this issue to the attention of leaders in Congress. The national 800# was born and teleservice centers were opened, enlarged, consolidated, or closed over the years to create an effective organizational structure for providing national toll free service. This new service gave rise to our large Mega TSCs as demand grew.

In the 1990s a major concern of NCSSMA was the proper classification of field office positions given the increased responsibility of field offices and the increasing complexity of the work. NCSSMA was successful in making the case for higher grades of many field office/TSC positions, including Operations Supervisors, Branch Managers, and

many District and Assistant District Managers and TSC management positions. Later in that decade there was a move to reduce the number of managers at all levels of government. NCSSMA directly faced this challenge by demonstrating how adequate management staff directly contributed to the quality of service in SSA offices. During the last decade, the movement to cut staff and management positions was reversed as a result of NCSSMA's efforts. Today the agency has approximately 66,950 full time permanent employees which is significantly below the 80,014 of 1977 even though workloads are dramatically higher.

Today's field office is vastly different from that of the early years, but also vastly different from what many of us found when we began work with the agency. Technology has reshaped the office and how the work is done. We no longer wait two weeks for an earnings record or overnight for a computer printout. Few claims now require manual awards forms. Long gone are the flexoline tally controls, the SSA-250, and paper claims. Technology has reshaped our work day and our offices in a positive fashion. However, due to the workload increases as the boomer generation ages and the recent economic decline, field offices and TSCs continue to face many challenges. We can be sure that the management associations at the regional level and NCSSMA at the national level will continue to stress the importance of high quality frontline community based service to decision makers both within and outside of SSA.

## The Sandwich Generation in SSA

Our dedicated field office and teleservice center management work diligently to serve and provide the American public with superb service. On a daily basis we resolve complex issues for customers including changes in complicated living arrangements and familial issues involving custody rights, power of attorney, or the daily care of our elderly population. The majority of the time we understand their situations so well. Some of us can directly relate to the situation as we are living it ourselves. In this article we are briefly explore the Sandwich Generation. Wikipedia defines the Sandwich Generation as "a generation of people who care for their aging parents while supporting their own children." The term was officially added to Merriam-Webster's dictionary in 2006. According to the National Special Events Registry, July is the



## Sandwich Generation *continued*



Sandwich Generation Month. Throughout the United States events are held to increase awareness and celebrate the dedication of adults who are part of the Sandwich Generation. There are nearly 10 million boomers that are now raising kids, teenagers or young adults while providing financial support for an aging parent. Usually they are between the ages of 35 and 55.

SSA's Sandwich Generation members wear multiple hats. They are the primary caregivers for their parents or their in-laws while supporting their children and leading successful careers. At times they are the sole financial and emotional providers for their families serving as heads of households. A poor economy often makes things even more difficult as more people need help and fewer people are able to provide it. When we solicited input in our last edition from members who now find themselves in the Sandwich Generation we got several responses that highlight the challenges they face.

An Operations Supervisor wrote; *"I ... have been blessed to be able to juggle an SSA career, raise a 17 year old son who will soon graduate in June, a 10 year old daughter, and a 23 old son with Down Syndrome who still lives at home. My 77 year old father-in-law lives with us since my husband is an only child and his mother passed away in June 2007. I feel like I'm married to my husband twice over, the odd couple since he and his father are opposites! We are definitely the sandwich generation..."*

A Public Affairs Specialist responded; *"I'm responding to this message, as I am a proud [member of the Sandwich Generation] raising four children ages 11, 10, 7 and 1. My mother is a widow and recently had quadruple bypass surgery. She's had a couple of heart attacks, prior to this surgery. I would like to share this story with you as many challenges are faced from sun up to sun down."*

We also heard from a District Manager who shared these comments; *"I have 6 children at home ages 6, 7, 13, 15, 15, and 16. I am also guardian of my mother, age 86, who recently entered a nursing home."*

Most of our respondents were women. Often they find themselves alone in carrying the burden of responsibility for caring for their parents. Sometimes there is a spouse and/or siblings to share the burden. All too often though, siblings and in-laws who would like to provide assistance can't because of their location or their financial position. That is the story of one our managers in the Midwest. She is the sole provider for her family and is busy raising

a young teenage son. Her words of advice are, "Never neglect one, there has to be a balance." Those are words of advice not just for the Sandwich Generation. At times we all tend to spend more time at work than with our family and we must remember to maintain a sense of balance. Balance will maintain a healthy sense of living, both physically and emotionally.

A questionnaire was distributed to the individuals who volunteered to share their experiences. We would like to share their insights to two of our questions in this story.

### **Do you think a child who is over 18 years old should continue to live at home? If so, should they have any guidelines? If not, why? At what age should children move out to their own place?**

The overwhelming response was that it depends on the circumstances. If the child wishes to continue to live at home there should be guidelines or rules and overall respect for the home. Today's economy leaves few opportunities for many young adults. Consequently many young adults are remaining at home for this reason and others. One respondent found help when his son moved in with his grandparents to assist in their daily activities including doctor's visits and financial administration.

### **What advice would you give to someone who finds themselves in a similar situation caring for a parent and child?**

Here folks recommended seeking help from friends and family. Unfortunately, for one individual this was not a favorable option. In fact when attempting to seek help from siblings or in-laws the situation worsened. Another individual offered words of advice that had been given to them, *"do not make permanent decisions based on temporary situations."*

We must remember we all endure daily circumstances and situations affecting our personal and work life. The Sandwich Generation provides an excellent example of how everything is possible. Organization, patience, understanding, and faith will lead to excellent and constructive decision making. B. C. Forbes said, *"He who has faith has...an inward reservoir of courage, hope, confidence, calmness, and assuring trust that all will come out well--even though the world may appear to come out mostly badly."*

I would like to thank all of the volunteers who provided me with insight into their personal work and life struggles. You are all heroes and leaders, thank you for your courage.

**OFFICERS**

**President**  
JOE DIRAGO  
Newburgh, NY

**Vice President**  
STEVE CLIFTON  
Greeley, CO

**Secretary**  
BILLIE ARMENTA  
Phoenix (DT), AZ

**Treasurer**  
ANNA GUTIERREZ  
Las Cruces, NM

**TSC Representative**  
BRIAN RUSSELL  
Denver, CO

**Executive Officer**  
KENNETH SCOTT HALE  
Cookeville, TN

**Immediate Past President**  
GREG HEINEMAN  
Norfolk, NE

**EXECUTIVE COMMITTEE**

PAUL GILFILLAN  
Meriden, CT

DEBORAH BANIKOWSKI  
Syracuse, NY

RITA ALEXANDER  
Staunton, VA

DWIGHT MOBERLY  
Danville, KY

RICK LENOIR  
Joliet, IL

PEGGY BUCHANAN  
Lufkin, TX

PETE JAUDEGIS  
Pittsburg, KS

JOAN ARNOLD  
Ogden, UT

JUDY TEIXEIRA  
North Sacramento, CA

DARIN PARK  
Twin Falls, ID

WASHINGTON  
REPRESENTATIVE  
RACHEL EMMONS  
Phone: (202) 547-8530  
Fax: (202) 547-8532  
[rachele@greystone-group.com](mailto:rachele@greystone-group.com)

## NWMA Hosts NCSSMA's 41<sup>st</sup> Annual Meeting "Blazing the Trail for the Next 75 Years"

The Northwest Management Association will host NCSSMA's 41<sup>st</sup> Annual Meeting in Portland, Oregon this year. The meeting will be held October 4<sup>th</sup> through the 7<sup>th</sup> at the Portland Hilton & Executive Tower. Confirmed guest speakers include Commissioner Astrue, Deputy Commissioner for Operations Mary Glenn-Croft, Chief Information Officer Frank Baitman, Regional Commissioner Stanley Friendship and Area Director Beth Hidano. Once a year each regional management association sends four delegates and one alternate delegate to represent it at the NCSSMA Annual Meeting. The delegates are responsible for determining what resolutions NCSSMA will pursue in the following year. They also have the important task of electing the officers who will serve on the National Council for a year beginning immediately after the close of the meeting.

NWMA has two exciting excursions planned for those who are interested. Sunday includes a tour of the scenic Columbia Gorge stopping at Multnomah Falls before ultimately arriving at Hood River. There participants will board the Mt. Hood Railroad for a train tour to the base of Mt. Hood. Monday includes a trip through wine country to McMinnville's Evergreen Aviation and Space Museum. Registration information will be posted to the website soon as the deadline for registering will be July 31<sup>st</sup>.

With beautiful Mt. Hood as inspiration, the delegates will accomplish the business of NCSSMA with spirit and determination.

All members are welcome to attend the meeting.  
Hope to see you there!

### FrontLine's Editorial Review Board

**Joe Dirago, NCSSMA President**  
**Greg Heineman, NCSSMA Immediate Past President**  
**Rachel Emmons, Washington Representative**  
**Jill Russell, PRMA First Vice President**  
**Kathryn Rhoads, Former TSC Representative**

*FrontLine Editor: Bethany Paradis*  
*Layout: Bethany Paradis*



#### Disclaimer

The views expressed in FrontLine by contributors, e.g. letters to the editor, guest editorials, etc., represent solely the views of the respective contributors. Staff editorials reflect the views of the editors, and should not be assumed to reflect the formal positions or views of the National Council or the Social Security Administration.