

November 2003- Issue 12

- + [34rd Annual Meeting of NCSSMA](#)
 - [Day One - Tuesday, November 4](#)
 - [Day Two - Wednesday, November 5](#)
 - [Day Three - Thursday, November 6](#)
 - + [First Impressions:](#)
-

This is a special Annual Meeting edition of FrontLine. Our normal features, such as the President's Message and Editor's Corner, will return in the next edition. Very special thanks are due to Rick Warsinskey, District Manager, Cleveland DTN, Ohio, for serving as reporter for this edition.

Phil Walton, Editor

A First Hand Report of the 34th NCSSMA Annual Meeting Albuquerque, New Mexico November 4 to November 6, 2003

Theme: Soaring to New Heights

By Rick Warsinskey

DM, Cleveland DTN, OH & President, Chicago SSMA

The official Annual Meeting minutes will be shared through e-mail to the members. This FrontLine report is intended to give an informal, day-by-day account of the Annual Meeting.

Day One

Jim Majestic, Dallas Region Management Association President, began the day by welcoming the delegates and guests to Albuquerque at a morning breakfast. He also introduced Horace Dickerson, Dallas Regional Commissioner. Mr. Dickerson welcomed everyone to Albuquerque.



Commissioner Barnhart

After the breakfast, Tony Pezza officially opened the meeting with the Pledge of Allegiance and introduced Commissioner Jo Anne Barnhart.

Commissioner Barnhart spoke extensively about the challenges in the Disability program. The President and the Director of OMB requested an 8.5 % budget increase for SSA. The Commissioner has worked closely with Congress to get this increase. She talked about the impact on the disability program if this budget is not passed. This proposed budget increase will be the first step to reduce our backlogs, which we hope to eliminate by 2008. The Commissioner was very pleased with the National Council's efforts resulting in 88 Congressional signatures on a letter to the House-Senate conferees considering the Labor-HHS bill in support of the 8.5% increase.

The Commissioner stated e-Dib is absolutely essential to making strong progress in the Disability process. She is very pleased with our progress so far. Commissioner Barnhart acknowledged it takes longer to take an EDCS claim. She expects to make necessary adjustments to interview times and goals after reviewing analysis. However, she stated we need to continue to use EDCS and she is pleased we have already reached the end-of-year 65% EDCS usage goal. EDCS will clearly improve our overall Disability processing times and quality. This year, processing times have decreased by six days, while claims during that same period increased by 6.4%.

The Commissioner stated that there has been a positive reaction to her recent proposals to change the Disability process. The process of change will not be rushed, as this is a major undertaking. Optimistically we are talking about October 2005 to begin implementation. She has asked Mary Chatel, manager of the Warwick, Rhode Island field office, to coordinate this undertaking for her. (Note: Mary is a former NCSSMA National President.)

The Commissioner's proposals are based on three questions the President personally asked her in April 2002: Why does it take so long to make a disability decision? Why can't people who are obviously disabled get a decision immediately? Why would anyone want to go back to work after going through such

a long process to receive benefits?

The Commissioner stated no one will lose their job, there will be no demotions, and no one will be forced to move because of these proposals. With e-Dib we can move cases around electronically so the work can be done where people are.

The Commissioner estimated that, based on the quick decision provisions of her proposal, 10-20% of the disability claims will be decided within 20 days. Between quick decision and elimination of the reconsideration, more resources will be available to DDS. DDS will use the extra resources to better document the record of more complicated cases. The goal is to make the right decision as early in the process as possible.

The Commissioner stated we met almost all our goals for FY03 and our productivity is increasing. She then took questions from the delegates.

Question: What is the time line on the demonstration project for the Temporary Disability program?

Answer: The Commissioner stated that it would take 3-5 years to test the demonstration project to assess whether we have the right definition of disability. Changes in the definition to disability would take legislative changes.

Question: What will the 8.5% budget increase give us in terms of more resources?

Answer: The Commissioner stated that there would be the equivalent of 2,500 more work years SSA wide, including DDS. Around 1,000 of the work years will result in additional hires for field offices and PSCs. Some of this money will also go for overtime.

Question: Will more money be given to OIG to combat fraud?

Answer: The Commissioner stated they will receive an increase in their budget but not as much as the 8.5% SSA is expected to get.

Question: What can we do about all our automation challenges?

Answer: The Commissioner stated there will never be a perfect world when automation is involved. The agency will continue to work on it and we should communicate these problems to Baltimore.

Question: If we get the 8.5% budget increase, will we be able

to increase budgeted moneys for change of station and other travel?

Answer: The Commissioner stated there will be more money in this budget for travel. She will look at trying to provide more money for change of station, as she is concerned about how this affects diversity when we are only able to consider those people within commuting distance.

Tony Pezza then began the business part of the meeting by recognizing past NCSSMA Presidents in attendance, in addition to Steve Korn, the Immediate Past President: Steve Bauer (84-86), Bob Duncan (88-90), Mary Chatel (91-92), and Don Seatter (95-97).

Tony Pezza next introduced Hal Daub, the Chairman of the Social Security Advisory Board. Mr. Daub stated that the Board continues to support the increased budget that was submitted by the President for SSA. Much needs to be done to meet the Agency's resource needs. The Board supports the Commissioner's proposed disability plan and the need to improve quality, especially in-line quality.

The Board is looking at the underlying definition of disability, which has not changed in nearly a half century. A report on this will be out shortly.

The business meeting resumed with the seating of the delegates. Steve Korn, Immediate Past President and meeting Parliamentarian, reviewed the rules of the meeting. The Treasurer, Greg Heineman, reviewed the financial status of NCSSMA. We will probably be over budget a few thousand dollars this year, based on an Executive Committee decision earlier this summer. Due to restrictions in the Agency's travel budget the June meeting of the Executive Committee in Washington had to be funded by the National Council. Greg did report that membership continued to grow this past year.

After lunch, Dr. Reginald F. Wells, the Deputy Commissioner for Human Resources, spoke to the delegates regarding new initiatives, such as the President's Management of Human Capital Initiative and the establishment of the Chief Human Capital Officer (CHCO) role. Dr. Wells indicated that he has been designated the CHCO for SSA. He also reported that the Commissioner is committed to no loss in jobs as a result of competitive sourcing. Among other things, OMB has stated that at least 60% of the Agency staff must be under a multi-level appraisal system in order to get a green rating for performance management. In the area of training, he indicated that all IVT sites are up and working now following the satellite failure of a few weeks ago.

In FY 03, management training was cut drastically due to budget limitations. If the Agency receives the budget proposed by the President, then there should be sufficient money for significantly more management training this year. Based on his recent testimony before Congress, Dr. Wells indicated that there will likely be closer scrutiny of the diversity profiles of federal agencies. SSA has a positive story to tell because there is a clear business imperative for diversity at SSA. Much attention has been given to making the SSA workforce one of the most diverse in government. On the labor relations front, Dr. Wells shared that management is very interested in successfully negotiating a new national labor agreement with AFGE in FY 04.

Question: What is the status of restoring line management positions?

Answer: Dr. Wells stated that it is difficult to restore positions that are lost. Any approach would have to be incremental. He thinks there has been a little improvement. Based on our research, there is no clear rule of thumb on management to staff ratios. The Commissioner is committed to doing what she can in this area, but Dr Wells acknowledged that progress in this area may not be up to NCSSMA expectations.

Question: What has been done regarding the tracking of official time by the Union?

Answer: Dr. Wells stated that all employees have to be held accountable for their time. In order to make the tracking and reporting of official time usage more efficient and effective, a new automated system has been implemented known as OUTTS. If managers/supervisors have questions regarding the tracking and reporting of official time using OUTTS, they should contact their regional LR contact.

Question: Will there be any changes regarding the fact that there is growth in bargaining unit GS-12's but little increase in compensation for first line management?

Answer: This is a difficult issue to resolve and needs to be looked at more. There is no easy answer.

Question: Will there be more funding of basic management training?

Answer: Dr. Wells indicated that a blended approach to leadership and management training is planned for FY 04. Assuming an adequate training budget, we plan to offer classroom and online training courses for managers/supervisors. The overall goal is to ensure that

managers have training opportunities that allow them to improve competencies needed to be more effective.

Tony Pezza then gave his President's report. He stated that over the past two years we have established an excellent relationship with agency leadership. We have excellent access and have been involved in more workgroups than ever before. We have been very well received on the Hill and the success of getting 88 Congressional signatures in support of our budget demonstrates this.

This year's management survey continues to clearly demonstrate the need for more management staff. This will remain a major focus of the NC. We will need to increase our efforts to deal with the inequities in management structures. We need to take a very hard look at IVT entry level training. We do not believe that we are really saving money when we have to consider the costs of salaries for mentors. The new management software is not working well and we need to work with Central Office to improve it.

Rick Warsinskey, Finance Committee chairperson, presented next year's National Council budget. The proposed budget, which was passed later in the meeting, projects a surplus of about \$3,500. The audit report was then presented and was followed by the reading of 24 resolutions and 1 emergency resolution. Extensive discussion followed on the resolutions. This process involved the refinement of resolutions through amendments and editorial changes. Voting on resolutions followed the discussion of each resolution.



Day 2



DCO Linda McMahon

The day began with Linda McMahon, Deputy Commissioner for Operations, speaking to the delegates. The DCO stated she plans to continue her monthly conference calls. She would like to see more questions asked and everyone should feel free to ask questions on the calls. She also wants to hear from us by e-mail. She wants two-way communication.

We need to work to answer as many telephone calls per day as we can in the TSC's and have as many people available to answer calls as possible every day and hour. We want to be able to free up the Spike units in the PSC's so they can get their deskwork done.

Goals need to be attainable and set to ensure they, in fact, encourage good service. We cannot meet every goal every day. We have to use common sense. There will be differences among offices that have to be considered.

We need to continue to work to get people to raise problems more timely and have people feel comfortable doing so. We need to integrate our decision making more so there is clearer direction.

Relationships are improving among the components, especially with Systems. The DCF has been a disaster-we implemented it too early, resources have been wasted, and we will have to do more rework, but we are doing everything we can to get it in shape. We do need to give resources to Systems. Not all the investments in the organization can be in the front line.

We need to commit to quality in all we do. We have reduced our productivity by having to do rework. We have to be more concerned about quality. If we do it right up front, we will improve our long-term productivity. Perhaps we need less productivity up front in exchange for more on quality, which will significantly reduce our rework and in reality make us more productive.

There will be more visits from Headquarters components to the field to get a better understanding of field needs. We still need to send in our good ideas. We do need to be patient when we suggest changes and remember change is often incremental. We need to remember that we do not need the field to do the easy work but the complex work. If the public can do more on the internet, we will free the field up to have time to do the more complex tasks.

We hope to be able to do management conferences and management training this fiscal year. But continued delays in getting our budget approved make it hard to make clear commitments now. It is not certain we will get the full 8.5% budget increase. If we get less then some things will be cut back because we have to cover the 1,000 new hires and likely pay raise of over 4%. We need to be committed to high quality mentoring, including mentoring after the class ends, and to build this into the budget.

We are still looking at the Field Office Assistant upgrade. Also a developmental, but not permanent, Deputy AD position may be created. DCO is working with DCFAM to improve the multiple PIN-password issue. Private sector software to improve this problem is being looked at.

Question: Can we redefine the DOWR or work measurement decision to give us credit for all work issues cases we clear?

Answer: It is our intent to capture all work we do and we are working to do this.

Question: Is having 1,800 trainees in an IVT class the way to go?

Answer: We do need to rethink the IVT situation. Personnel costs are sunk costs and we tend not to look at this when we make our decisions about how we can do our training. We will continue to look at this. We are hearing good feedback on the quality of core training in this new basic IVT class that is in process.

Question: How are we going to square limited management resources with going to a multi-tier appraisal system?

Answer: We will probably have to see how this goes and what the impact is. Not everyone agrees on what the impact will be. Sometimes we just have to deal with these realities. It is not definitely clear we will have a tiered appraisal system or how many tiers we will have. But this is the direction we want to go.

Question: How do we balance the pressure to meet a high percentage of RZ clearance versus the quality of the RZ's we put out and the pressure on our staffs?

Answer: If we processed fewer RZ's with better quality we could save more money. The 99% goal is based on legislation but it will be looked at more carefully. We may include the RZ's released for August and September of 2004 in this year's RZ goal. However, we will probably lower the end of year goal from

99% to compensate for this increase in end of year RZ's.

We are also moving to an 83% RSI goal.

Question: What adjustments can be made on the appointment goal, especially for inner city offices, which have high in office traffic?

Answer: Goals are set for the nation. Expectations do not need to be the same for every office. Consideration needs to be given based on the service area of an office and what is going on in an office. This can be discussed more with the Regional Commissioners.

Question: How can we improve field office telephone service?

Answer: We cannot fix this situation right away. This is a long-term challenge. Although resources are part of

the problem, we need better field office telephone equipment. Field Office telephone service should improve with better equipment and better processes for handling FO calls, just as 800# service did. We do need to get more and better concrete data on busy rates to make a better business case so we can invest more in our telephone systems and look at better ways to lower the high busy rates in many field offices.

Question: Why can't we replace people as quickly in the field as we can in the TSC so that a staffing floor is always kept?

Answer: We do need to get FTE's into each component faster. It is a challenge to do this down to the level of every office--nearly impossible. We may have to move our work around more.

Question: What can be done about the fact that there are more bargaining unit GS-12's than OS's and MSS's?

Answer: There are people who still want to be OS's and MSS's and are not motivated by money and enjoy their jobs. But we are open to looking at more upgrades but not DM-14's to the GS-15 level. We are a lower graded organization than most federal organizations. This is a complicated issue. Some of the past upgrades may not have made the best business sense. Also, each upgrade raises questions with others who are not upgraded. There is nothing on the drawing board to upgrade OS's and MSS's as there are other issues to deal with now. Perhaps we are concerned too much with pay and grade as a reason for people to move into management positions. I do believe we will get the best people into management whether we upgrade them or not because some people simply want to

be in positions where they can influence how the agency operates and realize the MSS/OS positions are the starting place. Maybe those who are most motivated to do a job for other things than money are better for the organization. I am more concerned about the stress levels in the job than the pay level.

In the afternoon Sara Garland, NCSSMA's Government Relations Consultant, updated us on her efforts to support NCSSMA. Sara stated that we have stayed on message for more resources. She stated the NC's visit to the Hill in June was very beneficial. We would like to have all the members contact their Congressmen and Senators, not just the National Council. The Survey of Management report has been very helpful in making our case to the Hill.

It was quite an accomplishment by the Commissioner to get OMB to agree to an 8.5% increase in the budget. All the meetings we have had on the Hill have really started to pay off this year with increased Congressional support.

The White House has stated they will veto the Labor-HHS Appropriations bill, which contains our budget authorization, if the controversial DOL overtime provision is not settled in the Administration's favor. There is a possibility there may be a Continuing Resolution for the entire fiscal year.

It is expected that there will be a provision passed, as part of the DOD bill, for overtime to be at least as much as your regular pay. Our true time and a half overtime provision is still being worked on.

Our pay raise is tied up in conference. We may get a smaller raise in January submitted by the President and then a makeup raise once Congress settles on the budget.

After Sara spoke, Steve Korn reminded everyone that if you are going to initiate a contact to your Congressman or Senator, you cannot use your time on the clock, your government e-mail, or government equipment to do this. It is acceptable to share or forward information to our own members regarding making contacts with the Hill on issues but not to actually lobby a member of Congress or a staffer on government time or using government equipment.

Wednesday Evening

A banquet was held for all attendees and guests. Tony Pezza presented two special awards. The National Council Community Service Award was presented to Richard Osso, ADM, Newport News, VA. As Mr. Osso was unable to attend, Tim Crews, President of the Philadelphia Region Management

Association, accepted on his behalf.

A Special Achievement Award was presented to Ginny Lighthizer, former NCSSMA Vice President and CSSMA President, for her many years of service to the Management Association. Ginny left the Executive Committee after her promotion to Area Director earlier this year.

NCSSMA Vice President Ron Buffaloe then presented the Joseph P. Collins Award to Tony Pezza. This is NCSSMA's highest award and was given to Tony in recognition of his many fine years of service to the National Council, including his past two years as President.



Day 3

Near the end of the meeting, the results of the election of the NCSSMA officers were announced:

President, Ron Buffaloe, District Manager, Salisbury, North Carolina

Vice President, Rosemary Dunkle, District Manager, Kokomo, Indiana

Secretary, Judy Bernstein, District Manager, Boston, Massachusetts

Treasurer, Greg Heineman, District Manager, Norfolk, Nebraska

TSC Representative, Rudy Macias, Teleservice Center Manager, Phoenix, Arizona

Newly elected President Ron Buffaloe announced his selection of Bethany McGuire, District Manager, Saco, Maine as his Executive Officer.

Already looking ahead to next year, the Boston Region announced the 2004 Annual Meeting would be in Providence, Rhode Island. The San Francisco Region stated the likely location of the 2005 Annual Meeting would be San Diego, California.

At the end of the meeting the delegates gave a rousing round of applause to DRMA President Jim Majestic, Host Committee Chair Kay Rhoads, and the entire Dallas association for all their efforts in organizing the exceptionally well run 2003 NCSSMA Annual Meeting.



First Impressions

There are plenty of perspectives on the NCSSMA Annual Meeting. One of the more telling viewpoints is from those attending an annual meeting for the first time. With that in mind, we offer the following excerpts from first time participants.

“If any manager or supervisor finds himself/herself frustrated at our current situation in the field, NCSSMA offers light at the end of the tunnel.”

Brad White, Roanoke, VA

“If you do not belong to your regional management association, now is the time to join.”

Carol Weber, Reading, PA

“This experience left me with a new found respect for the managers and supervisors who devote their time away from their offices and busy schedules to take our concerns to not only our executives in Central office, but to the Members of Congress.”

Frank Cardoza, Mesa, AZ

“The NCSSMA Annual Meeting provided delegates the opportunity to step back from our regular duties for a few days and to see our Agency from a different perspective, the “big picture.”

Susan Suzuki, Juneau, AK

“The NCSSMA meeting itself is really about sixty some odd, (some odder than others), management folks representing different parts of the country coming together to share ideas.”

Steve Powers, Quincy, MA

“I noticed that those at the top of our agency.....all respected our leadership and our organizations as a whole.”

Douglas Schenck, Rockford, IL

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