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# HCFA/CMS

## *ALUMNI NEWS*

SPRING 2008 (Vol. 14 No. 2)

MESSAGE FROM THE PRESIDENT

Well, it looked like it was never going to happen but Spring finally showed up, so we thought we'd celebrate with another issue of the HCFA/CMS Alumni News. I'd like to thank all of you who have renewed your membership for 2008 (and in many cases beyond that as well). Dues remain at \$5.00 per year and we think we must be doing something right because only a very small handful of members did not renew this year, and we are still chasing after a few who have said they intended to do so but haven't come in yet.

I am also pleased that the association continues to attract new members and continues to be an important part of the retirement life of many of us. On page 2 you will see a list of 9 new members, bringing the membership up to an all time high of 524. By providing copies of the CMS internal employee newsletter (News You Can Use), a Member Directory and a quarterly newsletter, we promote a continuing connection between CMS (formerly HCFA) and its retirees, both at the central office and regional office levels. We try to provide information of interest to all retirees.

In this issue you will also find items about the COLA Count, CMS Holocaust Memorial Program, the Economic Stimulus Payment, Credit Card "Convenient" Checks, the latest on CMS senior staff and organizational news. As usual, all kinds of goodies appear in the ever-popular Komedie Korner segment. There are lots of items that we hope will be of interest to you.

I want to wish you all a Wonderful Spring and continued happiness, good health and prosperity in retirement.



William L Engelhardt

**HCFA/CMS ALUMNI NEWS**

Published four times a year for the members of the Health Care Financing Administration /Centers for Medicare and Medicaid Services (HCFA/CMS) Alumni Association

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**DUE DATES FOR FUTURE ISSUES**

Summer Issue – June 27, 2008  
Fall Issue – September 26, 2008

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### NEW MEMBERS

The Association extends a hearty "Welcome Aboard" to the following new members:

Barbara Brunstetter  
Eve Fisher  
Peggy A. Hetrick  
Dale G. Jones  
Phillip K. Luster  
Susan Myers  
Joan Palmisano  
Patricia Sasse  
Stephen R. Shepard

We now have 524 active members.

### NEW MEMBER DIRECTORY UPDATE

At the back of this newsletter you will find a 2 page Member Directory Update. It includes all additions (i.e., new members) and reported changes since the Summer 2007 Edition of the Member Directory was issued. We have continued to include updates from July 2007 on in each issue of The HCFA/CMS Alumni News. The update in this issue is a complete one and can replace all prior updates. **Since this is an update, you will NOT find yourself listed in it unless there has been a change in your membership information or you became a new member since the full Member Directory was issued in July 2007.**

### SUMMER PICNIC

This is just a "heads up" to remind you to start thinking about attending the summer picnic this year. It will probably be sometime in mid August at the home of Walt Schauer mann, where spacious grounds, an in ground swimming pool, picnic tables and an air conditioned finished basement off the patio in case of hot or inclement weather add up to great facilities. A great time is had by all. Look for more details in the SUMMER issue of the HCFA/CMS Alumni News.

### MEMBERSHIP SEARCH

As always, we acknowledge that there are many HCFA/CMS retirees that we have not been able to reach to tell them about the Alumni Association and invite them to join. We continue to ask for your assistance in spreading the message about us to them. If you know of any retiree that is not a member, please let them know about us and tell them how to contact us by telephone, snail mail or e-mail (all of that information can be found on page 2 of this issue). We will be very

happy to send, either electronically or via snail mail, anyone the enrollment form and further information about membership. And Bill Engelhardt says you can always e-mail him personally at [wlengelhardt@adelphia.net](mailto:wlengelhardt@adelphia.net) for faster response (as the office e-mail is only accessed weekly).

### **SSAEAA**

We'd again like to remind members that we do have a link to the Social Security Administration Employee Activities Association (SSAEAA) on our web site. The actual URL for it is "<http://ssaeaa.org>" but you can just click on the link on our page. HCFA/CMS retirees are automatically members of the SSAEAA and are eligible to participate in discount purchases.

### **E-MAIL ADDRESSES**

Sharing e-mail addresses is one way the Alumni Association helps members stay in touch with each other. Equally important, it helps us stay in touch with you. If you have an e-mail address and we don't know it, or you have changed your address and forgot to tell us, it would be very beneficial to both of us if you'd pass along the latest address to us.

Those of you who have provided us with your e-mail address know that we occasionally send out e-mail notices of items we feel will be of interest to members. Some notices go to all Internet connected members nationwide and others go to Internet connected members within our generous description of commuting distance of the Baltimore/Washington area.

A perfect example of the more "local" distribution is the next item, about the CMS Holocaust Memorial Program. We sent out timely information about this event via e-mail. Although we decided to include it in this issue of the HCFA/CMS Alumni News, it may well be too late for "locals" to act on it if interested. We plan on mailing the newsletter on April 29 and the event is on May 1.

If you'd like to receive timely notice of retirement parties, events, etc., and you have an e-mail address, please make sure we have your e-mail address. You can pass it along to us at the Alumni e-mail address, [HCFAALUM@cms.hhs.gov](mailto:HCFAALUM@cms.hhs.gov), or to Bill Engelhardt directly at [wlengelhardt@comcast.net](mailto:wlengelhardt@comcast.net) for faster action.

### **CMS HOLOCAUST MEMORIAL**

The annual CMS Holocaust Memorial Program will be held in the auditorium at CMS Headquarters on May 1, 2008 at 10:30 A.M. The main speaker will be a local Holocaust survivor of several concentration camps, Felix Kestenberg. Rabbi Elan Adler will lead the prayer commemorating the dead. The Krieger Schechter Day School's children's choir will also sing.

Any alumni interested in attending please contact Herb Hane via e-mail at [herbgitta@verizon.net](mailto:herbgitta@verizon.net) or via telephone at (410) 544-3244.

### **COLA COUNT**

Through six months of the counting period toward the January 2009 federal retiree cost of living adjustment, the inflation index used to set that adjustment stands at 2.7 percentage points, following an increase of 0.5 in January, 0.2 in February and 0.9 in March. The annual COLA count measures the change in the index's average from one third calendar quarter to the next. There are 6 months left in the counting period.

### **ECONOMIC STIMULUS PAYMENTS**

In February, the Economic Stimulus Act of 2008 was signed into law. The main provision of this law is the distribution of economic stimulus payments to millions of Americans. The payments will start to go out in May and continue through year-end, although most of them will be sent by the end of this summer.

\* If you owe federal income tax for 2007, you are eligible for a payment.

\* Those who don't pay income tax also might get a payment. That will be true for people who received at least \$3,000 in 2007 from any combination of earned income, Social Security benefits, and certain veterans' benefits. They will be entitled to \$300.

The maximum payment will be \$600 for single taxpayers and \$1,200 for couples filing joint returns. However, upper-income taxpayers won't collect payments. Single taxpayers with adjusted gross income (AGI) of \$75,000 or more in 2007 will get smaller rebates while those with AGI of \$87,000 or more will get nothing. For married couples filing joint returns, the phaseout begins at \$150,000 of AGI and no payments will go to couples with over \$174,000 of AGI.

In addition, there will be a \$300 payment per child. Those payments will be subject to same phaseout, which is 5 percent.

Federal tax returns filed for 2007 will automatically be treated as claims for the stimulus payments and no further action will be required. For those who do not have to file a tax return, because their income does not subject them to a tax, but who meet the eligibility threshold of income of \$3,000 as described above, they will need to file a Federal tax return to claim the stimulus payment. They may file a Form 1040A and need only enter the sum of their qualifying income in item 14a, normally reserved just for Social Security benefits.

## **SENIOR MANAGEMENT ANNOUNCEMENTS**

**Jeffrey Rich, M.D.** joined CMS on February 18th as the Director for the Center for Medicare Management. Jeff Rich has been a practicing cardiothoracic surgeon in Norfolk and Virginia Beach, Virginia as well as a Director-at-Large for the Society of Thoracic Surgeons. Jeff's first hand practice experience as well as his service on the National Quality Forum Board of Directors will give him tremendous insight into linking our payments to consensus quality standards. In addition, Jeff has been active in working with CMS partners in the Hospital Quality Alliance and AQA over the past several years. Jeff will be leading CMM will tackle several major initiatives this year including phase one of DME competitive bidding, driving quality through our annual payment rules, and the ongoing implementation of the Medicare Administrative Contractor initiative.

**Liz Richter**, who has served in an acting capacity as Director, has been appointed as the permanent Deputy Director for CMM.

**Karen Pelham O'Steen** retired from the position of Director, Office of Operations Management (OOM) on April 3rd, after 34 years in Federal service. As the Director of OOM, Karen has served in a wide variety of roles including the Agency's Chief Administrative Officer, Collective Bargaining Official, and Deputy Ethics Counselor. We appreciate her hard work and dedication. She has been an advocate for excellence in customer service within CMS. One of her last actions was to assist the Alumni Association in maintaining its web page at the CMS web site. Please join us in our best wishes for Karen in the next chapter of her life.

**Jim Weber**, Deputy Director of OOM began serving as the Acting Director of OOM as of Friday, April 4th. Jim has been with CMS for 15 years and has demonstrated executive leadership in several senior level positions within OOM. Since January 2006, he has shared full responsibility with the outgoing OOM Director for oversight and management of OOM operations. Jim will serve as the Deputy Ethics Counselor as well.

**Susan Cuerdon** joined OOM as the Acting Deputy Director on April 7. Susan formerly worked in OFM and in the Philadelphia Regional Office as an ARA. In addition, she worked in the Office of the Administrator and most recently joined CMSO.

**Herb Kuhn**, Deputy CMS Administrator, has taken on the additional role of Acting Director, Center for Medicaid and State Operations, replacing Dennis Smith who left CMS on April 11. Dennis came to CMS as part of the President Bush transition team in 2001.

**Jane Hyatt Thorpe** has been promoted to the position of Deputy Director, Office of Policy. She had been serving as Acting Deputy Director. Before joining the Office of Policy two years ago, Jane was responsible for policy development and direction concerning coverage, coding, and reimbursement processes affecting the medical device industry at the Advanced Medical Technology Association (AdvaMed). As the Associate Vice President for Payment and Policy,

she also coordinated industry efforts related to health information technology and served as a liaison to CMS, private payers, and other industry stakeholders. Jane also teaches health care corporate compliance for the George Washington University School of Public Health and Health Services and volunteers with two health care charities in the D.C. metro area. She received an A.B. magna cum laude in History and a Certificate in American Studies from Princeton University and a J.D. from Vanderbilt University School of Law.

### **CHIEF OPERATING OFFICER'S ACHIEVEMENT AWARD**

February 5, 2008

**Donna Jenkins**, of the Office of Financial Management in Baltimore, MD, has been selected for the Chief Operating Officer's Achievement Award. Donna is being recognized for this honor for her consistently high quality performance, professionalism, and contributions to Medicare Part C and Part D premium withhold accounting processes and issues.

**Lyla Nichols**, of the Denver Regional Office, has been selected for the Chief Operating Officer's Achievement Award. Lyla is being recognized for this honor for exemplifying an outstanding degree of public service, integrity, accountability, excellence, and respect, which embodies the CMS core values while working with our partners.

February 19, 2008

**Mary Schreck**, of the Office of the Administrator in Baltimore, Maryland, has been selected for the Chief Operating Officer's Achievement Award. Mary is being recognized for this honor for applying her outstanding organization skills to improve the processes and appearance of the Baltimore Office of the Administrator.

**Lavalea'I (Lea) Faleafine**, of the San Francisco Regional Office, has been selected for the Chief Operating Officer's Achievement Award. Lea is being recognized for her professional, consistent, and outstanding customer service to internal and external customers in Region IX.

March 3, 2008

**Beth French**, of the Center for Medicare Management in Baltimore, has been selected for the Chief Operating Officer's Achievement Award. Beth is being recognized for this honor for her exemplary role in significantly reducing the number of CMM's outstanding OIG/GAO Corrective Actions Plans (CAPS). Throughout this endeavor she has exhibited outstanding organizational and interpersonal skills.

**Treva Wornath**, of the Seattle Regional Office, has been selected for the Chief Operating Officer's Achievement Award. Treva is being recognized for this honor for her exceptional dedication, demonstrated tenacity, and innovative approach to resolving State and tribal

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Medicaid issues.

March 17, 2008

**Dennis Bogley**, of the Office of Beneficiary Information Services in Baltimore, has been selected for the Chief Operating Officer's Achievement Award. Dennis is being recognized for this honor for his professionalism, planning, and creativity as exhibited in the financial and contractual management of the Next Generation Desktop Task Order.

**Maria Martino**, of the Office of Legislation in Washington, DC, has been selected for the Chief Operating Officer's Achievement Award. Maria is being recognized for this honor for her outstanding analytical skills, consistent production of high quality materials and exceptional customer service to Congress.

March 31, 2008

**Timothy Hoogerwerf**, of the Center for Beneficiary Choices in Baltimore, has been selected for the Chief Operating Officer's Achievement Award. Timothy is being recognized for this honor for his dedication and personal commitment as demonstrated in the HPMS Medicare Advantage and Part D compliance modules.

**Peter Hickman**, of the Office of Policy in Washington, DC, has been selected for the Chief Operating Officer's Achievement Award. Peter is being recognized for this honor for his significant analyses and development of presentations that have aided Senior Leadership's understanding of the Medicare solvency problem and the Medicare Advantage program.

April 14, 2008

**David Santana**, of the Central Office, has been selected for the Chief Operating Officer's Achievement Award. David is being recognized for this honor for his outstanding work in the development and dissemination of a creative new product to reach Hispanic Americans with Medicare.

**Barbara Cebuhar**, of the Office of External Affairs, Washington, DC, has been selected for the Chief Operating Officer's Achievement Award. Barbara is being recognized for this honor for her outstanding work identifying crucial testimonials in support of the EHR demonstration to bridge the message from the provider/policy community to the public.

In recognition of their accomplishments, those employees from central office each earn the privilege of using a reserved parking space for two weeks. Additionally, their pictures are posted on the CMSNet. Those employees outside central office have their pictures posted on the CMSNet.

Charlene Frizzera

### **NOT CONVENIENT CHECKS!**

FEDweek.com advises, if you get one of those credit-card "convenience check" offers in the mail, shred the whole package. They usually come with high fees and low consumer protections. In a typical solicitation, you're told you can transfer your outstanding credit card balances to a low-rate card. However, the promised low rate won't last long. In addition, these checks often have a \$10 minimum transaction fee--even if you write a check for only \$25 or \$50.

If you use a convenience check for a cash advance, as is frequently suggested, expect to be hit with a lofty interest rate, much higher than the rate on purchases. Nationally, the average cash-advance rate for these checks is nearly 20 percent. Worst of all, you could face financial problems if a convenience check is lost or stolen. The federal law that limits losses to \$50 for improper use of a credit card does not necessarily apply to convenience checks. Similarly, you might not be entitled to relief on defective merchandise, under the Truth in Lending Act.

Thus, when you see something like this in your mailbox, it's better shred than read.

### **TAX FREE**

FEDweek.com reminds us that Roth IRAs were funded with after-tax dollars. After five years and after age 59 1/2, all withdrawals are tax-free. What's more, there are no minimum required distributions from a Roth IRA. If you don't need the money, you can pass on the account to beneficiaries, who can stretch tax-free distributions over their life expectancy.

But, even though a Roth IRA avoids income tax, it will be included in your taxable estate. If you are concerned with estate tax, you can take tax-free distributions from your Roth IRA and use the money to buy insurance on your life.

If the life insurance policy is held in an irrevocable trust, the death benefit will avoid estate tax. Then those death benefits can be used to pay the estate tax bill and the Roth IRA can be passed on to beneficiaries, free of estate and income tax.

### **CASHING IN LIFE INSURANCE**

FEDweek.com advises that when a life insurance policy is sold, the tax bill will depend on the amount paid and the seller's basis in the policy, which usually will be the total amount of premiums paid. Suppose, for example, Janet Baker has a \$500,000 policy she no longer needs. Over the years, Janet has paid \$80,000 in premiums and has taken no withdrawals or cash dividends.

At the time of the sale, Janet's policy has \$100,000 in cash value. She sells the policy for \$125,000.

\* The \$20,000 difference between Janet's basis (the \$80,000 she paid in premiums) and the \$100,000 cash value will be taxed as ordinary income, at rates up to 35 percent.

\* The \$25,000 excess of the purchase price (\$125,000) over the cash value (\$100,000) will be taxed at only 15 percent, as a long-term capital gain.

What if a term life policy is sold? These policies have no cash value. The IRS has not said that the gain will be taxed as ordinary income so you might decide to treat any profit as a long-term capital gain.

### **KOMEDY KORNER**

#### **ALPHABET FOR THE AGED**

(Submitted by Pat Sasse, President of the Social Security Alumni Association)

A for arthritis,  
B for bad back,  
C is for chest pains. Perhaps cardiac?  
D is for dental decay and decline,  
E is for eyesight--can't read that top line.  
F is for fissures and fluid retention  
G is for gas (which I'd rather not mention)  
H high blood pressure [I'd rather have low)  
I for incisions with scars you can show.  
J is for joints, that now fail to flex  
L for libido--what happened to sex?

Wait! I forgot about K!

K is for my knees that crack when they're bent (Please forgive me, my Memory ain't worth a cent)

N for neurosis, pinched nerves and stiff neck  
O is for osteo-and all bones that crack  
P for prescriptions, I have quite a few Give me another pill; I'll be good as new!  
Q is for queasiness. Fatal or flu?  
R is for reflux--one meal turns into two  
S is for sleepless nights, counting my fears  
T for tinnitus--I hear bells in my ears  
U is for urinary: difficulties with flow  
V is for vertigo, that's "dizzy", you know.  
W is worry, now what's going 'round?  
X is for X ray--and what might be found.

Y for another year I've left behind  
Z is for zest that I still have my mind,  
Have survived all the symptoms my body's deployed,  
And kept twenty-six doctors gainfully employed!!!

And here is a batch of goodies under the Banner:

**PLEASE TELL ME THIS WON'T HAPPEN TO US**

Submitted by Bob Brown & Mary Stewart

**LOST IN THE DARNDDEST PLACES**

An elderly Floridian called 911 on her cell phone to report that her car had been broken into. She was hysterical as she explained her situation to the dispatcher. "They've stolen the stereo, the steering wheel, the brake pedal and even the accelerator!" she cried.

The dispatcher said, "Stay calm. An officer is on the way."

A few minutes later, the officer radioed in. "Disregard," He said, "She got in the back-seat by mistake."

**FAMILY**

Three sisters, ages 92, 94 and 96, lived in a house together. One night the 96-year-old drew a bath. She put her foot in and paused. She yelled to the other sisters, "Was I getting in or out of the bath?"

The 94-year-old yelled back, "I don't know. I'll come up and see." She started up the stairs and paused, "Was I going up the stairs or down?"

The 92-year-old was sitting at the kitchen table having tea listening to her sisters. She shook her head and said, "I sure hope I never get that forgetful, knock on wood." She then yelled, "COME IN."

**I CAN HEAR JUST FINE!**

Three retirees, each with a hearing loss, were playing golf one fine March day. One remarked to the other, "Windy, isn't it?" "No," the second man replied, "it's Thursday." And the third man chimed in, "So am I. Let's have a beer."

**LITTLE LADY**

A little old lady was running up and down the halls in a nursing home. As she walked, she

would flip up the hem of her nightgown and say "Supersex." She walked up to an elderly man in a wheelchair. Flipping her gown at him, she said, "Supersex." He sat silently for a moment or two and finally answered, "I'll take the soup."

### **OLD FRIENDS**

Now this one is just too Precious...LOL! Two elderly ladies had been friends for many decades. Over the years, they had shared all kinds of activities and adventures. Lately, their activities had been limited to meeting a few times a week to play cards. One day, they were playing cards when one looked at the other and said, "Now don't get mad at me, I know we've been friends for a long time, but I just can't think of your name! I've thought and thought, but I can't remember it. Please tell me what your name is." Her friend glared at her. For at least three minutes she just stared and glared at her. Finally she said,

"How soon do you need to know?"

### **SENIOR DRIVING**

As a senior citizen was driving down the freeway, his car phone rang. Answering, he heard his wife's voice urgently warning him, "Herman, I just heard on the news that there's a car going the wrong way on Interstate 77. Please be careful!"

"Heck," said Herman, "It's not just one car. It's hundreds of them!"

### **DRIVING**

Two elderly women were out driving in a large car - both could barely see over the dashboard. As they were cruising along, they came to an intersection. The stoplight was red, but they just went on through. The woman in the passenger seat thought to herself, "I must be losing it. I could have sworn we just went through a red light." After a few more minutes, they came to another intersection and the light was red again. Again, they went right through. The woman in the passenger seat was almost sure that the light had been red but was really concerned that she was losing it. She was getting nervous. At the next intersection, sure enough, the light was red and they went on through. So, she turned to the other woman and said, "Mildred, did you know that we just ran through three red lights in a row? You could have killed us both!"

Mildred turned to her and said, "Oh, crap, am I driving?"

**ELDERLY LADY POEM**

Anonymous

When an elderly lady died in the geriatric ward of a small hospital near Dundee, Scotland, it was felt that she had nothing left of any value. Later, when the nurses were going through her meager possessions, they found this poem. Its quality and content so impressed the staff that copies were made and distributed to every nurse in the hospital. One nurse took her copy to Ireland. The elderly lady's sole bequest to posterity has since appeared in the Christmas edition of the News Magazine of the North Ireland Association for Mental Health. A slide presentation has also been made based on her simple, but eloquent, poem....And this little old Scottish lady, with nothing left to give to the world, is now the author of this "anonymous" poem winging across the Internet. Goes to show that we all leave "SOME footprints in time."

This is in single column format to make the verses line up right!

What do you see, nurses, what do you see?  
What are you thinking when you're looking at me?  
A crabby old woman, not very wise,  
Uncertain of habit, with faraway eyes?  
Who dribbles her food and makes no reply  
When you say in a loud voice, "I do wish you'd try!"  
Who seems not to notice the things that you do,  
And forever is losing a stocking or shoe.  
Who, resisting or not, Lets you do as you will,  
With bathing and feeding, The long day to fill.  
Is that what you're thinking? Is that what you see?  
Then open your eyes, nurse; You're not looking at me.  
I'll tell you who I am as I sit here so still,  
As I do at your bidding, As I eat at your will.  
I'm a small child of ten...With a father and mother,  
Brothers and sisters, who love one another.  
A young girl of sixteen, with wings on her feet,  
Dreaming that soon now a lover she'll meet.  
A bride soon at twenty-my heart gives a leap,  
Remembering the vows that I promised to keep.  
At twenty-five now, I have young of my own,  
Who need me to guide and a secure happy home.  
A woman of thirty, My young now grown fast,  
Bound to each other with ties that should last.  
At forty, My young sons have grown and are gone,  
But my man's beside me to see I don't mourn.  
At fifty once more, Babies play round my knee,  
Again we know children, My loved one and me.  
Dark days are upon me, my husband is dead;

I look at the future, I shudder with dread.  
For my young are all rearing young of their own,  
And I think of the years and the love that I've known.  
I'm now an old woman... and nature is cruel;  
Tis jest to make old age look like a fool.  
The body, it crumbles, grace and vigor depart,  
There is now a stone where I once had a heart.  
But inside this old carcass a young girl still dwells,  
And now and again my battered heart swells.  
I remember the joys, I remember the pain,  
And I'm loving and living life over again.  
I think of the years all too few, Gone too fast,  
And accept the stark fact that nothing can last.  
So open your eyes, nurses, open and see,  
Not a crabby old woman; Look closer... see ME!!

Remember this poem when you next meet an older person who you might brush aside without looking at the young soul within. We will one day be there too!

## OBITUARIES

### ROBERT M. BALL

#### **Former Social Security Official Dies**

By JESSE J. HOLLAND | Associated Press Writer  
6:29 PM EST, January 30, 2008

WASHINGTON - Robert M. Ball, a former Social Security commissioner considered by many as its chief defender and the father of Medicare, has died at age 93. Ball's death Tuesday was announced by the National Academy of Social Insurance, which he founded in 1986. No cause was given. Ball first worked as a Social Security field assistant in New Jersey in 1939. Appointed commissioner of Social Security by President John F. Kennedy in 1962, he stayed on as commissioner until his retirement in 1973. The Medicare and the Social Security disability program was enacted under his watch, and he was considered one of the foremost experts in those areas.

"Bob Ball left an indelible mark on the Social Security programs and the agency in that he played a critical role in the establishment of Medicare," Social Security Commissioner Michael J. Astrue said Wednesday. "His commitment to Social Security was unequaled, and he will be remembered as a great leader." John Rother, AARP's public policy director, called Ball a tireless defender of Social Security and Medicare. "His dedication has inspired a whole generation of younger advocates and leaders in the field, and his writings will continue to influence the debate for broader health and pension coverage for years to come," Rother said. Ball was a member of the 1983 Greenspan Commission that was able to strike a deal to boost taxes and cut benefits to keep Social Security solvent during the Reagan administration, the last major piece of Social Security legislation passed by Congress in the 20th century. Edward D. Berkowitz, who wrote the book "Robert Ball and the Politics of Social Security" in 2003, said Ball was part of the generation of public servants who came to Washington during the New Deal. "He was probably the best of them," Berkowitz said. "He was one of the best bureaucrats in Washington and was by far the most important bureaucrat who ever worked in the Social Security Administration." Ball had called for this year's presidential candidates to insist on no benefit cuts. "The program lifts 13 million elderly beneficiaries above poverty," Ball wrote in an Oct. 29 column in The Washington Post. "Without Social Security, 55 percent of the disabled -- and a million children -- would live in poverty," he wrote. "Social Security is the nation's most effective anti-poverty program. But it's much more than that. For every worker it provides a solid base on which to try to build an adequate level of retirement income. To weaken that foundation would be grossly irresponsible."

**Statement from Lawrence Thompson, Chair NASI Board of Directors,  
on the Death of NASI Founder,  
Robert M. Ball**

I am deeply saddened to report that Bob Ball died late last night at the age of 93.

No individual has done more to advance American social insurance programs than Robert M. Ball. He led the Social Security program for more than twenty years and he has been it's most influential and articulate advocate, architect, and philosopher.

From his early appointment in a field office to his selection as Commissioner of Social Security by President Kennedy in 1962, to advisory roles in following presidential administrations, Bob Ball sought a balance between political pragmatism and his determination to protect the principles of social insurance.

He also played a crucial role in the origins of Medicare and then successfully carried out the ambitious task of implementing the program. His unique ability to persuade policymakers to put aside partisanship for the sake of posterity will be remembered and missed.

Those of us fortunate enough to have worked with Bob have been blessed with a unique privilege. We experienced first hand his dedication to the social security program, his determination to protect, preserve and improve it, his genius in melding policy and politics, his remarkable ability to persuade others of the wisdom of his proposals, and his ability to lead. No other individual combined these qualities so effectively as Bob. We have lost a giant. We must carry on his work as a continual memorial to him.

As part of his long-term commitment to social insurance, Bob Ball founded the National Academy of Social Insurance (NASI) in 1986. It is in his legacy that NASI will continue the work of safeguarding the programs.

National Academy of Social Insurance (NASI) 1776 Massachusetts Avenue, NW, Suite 615  
Washington, DC 20036

phone: 202.452.8097 | fax: (202) 452-8111 | web: <http://www.nasi.org>

**THANK YOU FROM JEAN RITCHIE**

Jean Ritchie has asked us to pass along her extreme gratitude for all the outpouring of sympathy on the death of her son Steven Douglas Garland. She very much appreciated all of the visits to the funeral home and all of the phone calls and cards that she has received from Alumni members. These things have meant a lot to her during this difficult time.

# **IN MEMORIAM**

**The Alumni Association respectfully acknowledges**

**the passing of the following**

**Alumni/Employees/Spouses and expresses its**

**sympathy to family members:**

**ROBERT M. BALL (1/29/08) \***

**SARAH FRANCIS (1/8/08)\*\***

**STEVEN DOUGLAS GARLAND (3/9/08)\*\*\***

**ROBERT EDWARD KELLY (2/28/08)\*\*\*\***

**BRUCE MORRIS (2/1/08)\*\*\*\*\***

**FRANK D. RETTALIATA (3/18/08)\*\*\*\*\***

**SYLVIA STREIMER (2/8/08)\*\*\*\*\***

\* Former Commissioner of Social Security & "Father of Medicare"

\*\* Former attorney with OGC and Wife of CMS Employee Walton Francis

\*\*\* Son of HCFA/CMS Alumni Association Member Jean Ritchie

\*\*\*\* 1977 Retiree from the Division of Intermediary Operations, Contractor Performance Branch

\*\*\*\*\* HCFA and SSA Retiree

\*\*\*\*\* CMS employee (CMS/OA/OOM/EPMAG)

\*\*\*\*\* Mother of HCFA/CMS Alumni Association Member Robert Streimer

**If you are aware of any other deaths of Alumni please notify the editorial staff**

**April 2008**