

**GOVERNMENT OF THE DISTRICT OF COLUMBIA
Office of the Senior Advisor**



**Responses to Fiscal Year 2018-2019
Performance Oversight Questions**

**Beverly Perry
Senior Advisor, Office of the Senior Advisor**

Submission to

**Committee on Government Operations
Council of the District of Columbia
The Honorable Brandon T. Todd, Chairperson**

February 4, 2019

John A. Wilson Building
1350 Pennsylvania Ave. NW
Washington, DC 20004

1. Please provide the legislative history for the creation of the Office, which includes the following information:

- a. The legislative vehicle by which the Office was created (Mayor's Order, Resolution, or Statute).

The Office of the Senior Advisor was created by the Mayor through a reorganization of the Executive Office.

- b. What powers the Office has been delegated through Mayor's Order.

There are no specific powers delegated to the Office of the Senior Advisor (OSA) through the Mayor's order.

- c. The legislative vehicle by which the Director was appointed (Mayor's Order, Resolution, Statute).

The Director of the OSA was appointed by Mayor's Order 2015-003 January 2, 2015.

2. Please explain the mission of your Office.

The Office of the Senior Advisor (OSA) serves as liaison to local, regional, federal, and international partners by developing strategies and providing policy analysis to advance the Mayor's legislative agenda. Through the Office of the Secretary, OSA is also the custodian of the District's records and archives.

In addition to advancing the Mayor's local legislative agenda, the Office of Policy and Legislative Affairs (OPLA) is responsible for the processing, filing, and publication of hundreds of legislative items, reports, contracts, regulations, and correspondence each year. OPLA acts as the liaison between the Mayor's Office and executive agencies to the Council of the District of Columbia.

The Office of Federal and Regional Affairs (OFRA) was created by Mayor Bowser to navigate Congress, federal agencies, the White House, regional governments, and organizations, and to secure resources on behalf of the District of Columbia.

3. Please provide a complete, up-to-date organizational chart for each division within the office, including an explanation of the roles and responsibilities for each division and subdivision.

- a. Please provide a list of all employees (name and title) for each subdivision and the number of vacant positions.

OFRA- 1 Deputy Director Position

OPLA- 2 Associate Director Positions

(See Attachments 1 and 2 below for organizational charts.)

Please provide a narrative explanation of any organizational changes made during the previous year.

There were no organizational changes in FY18.

4. Please provide a complete position listing for your office for fiscal year 2018 to date, including the following information.

- a. Name of employee.
- b. Title of position.
- c. Grade, series, and step of position.
- d. Date employee began.
- e. Salary and fringe benefits.
- f. Job status (continuing, term, temporary or contract).

Posn Nbr	Title	Name	Hire Date	Grade	Step	Salary	Fringe (17.9%)	Job Status
00042864	Associate Director	Osborne, Calvin Lavoe	4/16/2018	6	0	\$ 91,722.63	\$ 16,418.35	Reg - Full Time
00044561	Policy Analyst	George, Deborah A	1/24/2011	6	0	\$ 91,722.69	\$ 16,418.36	Reg - Full Time
00046520	Dir, Pol & Legislative Affairs	Intrieri, Alana	5/5/2014	11	0	\$ 156,041.40	\$ 27,931.41	Reg - Full Time
00046831	Associate Director of Legislat	Rivera, Gianelle E.	6/19/2017	7	0	\$ 91,722.63	\$ 16,418.35	Reg - Full Time
00047250	Associate Director	Miller, Michaela	4/23/2018	7	0	\$ 91,722.63	\$ 16,418.35	Reg - Full Time
00048620	Deputy Director	Talamante, Tomas Arturo	1/2/2015	8	0	\$ 109,835.00	\$ 19,660.47	Reg - Full Time
00071737	Associate Director	Kessler, Jenny A	8/6/2018	6	0	\$ 91,722.63	\$ 16,418.35	Reg - Full Time
00073366	Associate Director	Chapin, Jeremiah Marsh	9/19/2016	6	0	\$ 91,722.63	\$ 16,418.35	Reg - Full Time
00073530	Associate	Hum,	9/17/2018	7	0	\$	\$	Reg -

	Director of Legislat	Bryan Andrew				91,722.63	16,418.35	Full Time
00073609	Director, Federal and Regional	Kinlow, Eugene D.	11/16/2015	10	0	\$ 140,675.30	\$ 25,180.88	Reg - Full Time
00085927	Associate Director	Kingland, Declan Leo	1/22/2018	7	0	\$ 91,855.01	\$ 16,442.05	Reg - Full Time
00087624	Senior Advisor	Perry, Beverly Lee	1/2/2015	11	0	\$ 198,500.00	\$ 35,531.50	Reg - Full Time
00087625	Associate Director	Williams, Rachel Y	2/20/2018	6	0	\$ 91,722.63	\$ 16,418.35	Reg - Full Time
00088192	Chief of Staff	Leonard Jr., Joe E.	11/27/2017	9	0	\$ 125,525.70	\$ 22,469.10	Reg - Full Time
00088334	Deputy Director	Scalf, Matthew D.	9/19/2016	9	0	\$ 113,784.20	\$ 20,367.37	Reg - Full Time
00088335	Staff Assistant	White, Giavanna	3/6/2017	3	0	\$ 65,139.98	\$ 11,660.06	Reg - Full Time
00094543	Associate Director	O'Dell, Mia Simone	9/10/2018	7	0	\$ 91,722.63	\$ 16,418.35	Reg - Full Time
00095168	Director of Operations	Montoya-Mercado, Gerald Samuel	9/8/2014	5	0	\$ 73,902.16	\$ 13,228.49	Reg - Full Time

There are three vacant positions.

5. Does the office conduct annual performance evaluations of all its employees? If so, who conducts such evaluations? What steps are taken to ensure that all office employees are meeting individual job requirements?

Yes, OSA conducts annual performance evaluations. The Senior Advisor evaluates the Directors of OFRA and OPLA, the Secretary of the District, the Chief of Staff, and the Staff Assistant. The Directors of OFRA and OPLA evaluate their staffs respectively, and provide regular, direct feedback on work product in writing and in person.

6. Please provide a list of employees detailed to, or from your office. Provide the reason for the detail, the detailed employee's date of detail, and the detailed employee's projected date of return.

No were no employees detailed in FY18.

7. Please provide the Committee with:
 - a. A list of all employees who receive cellphones, personal digital assistants, or similar communications devices at the Office's expense.

AI FY 2018 Cellphones, Personal Digital Assistants or Similar Communications Devices

First Name	Last Name	Email	Vendor	Phone#	Service Type	Device Type	FY Total
ALANA	INTRIERI	alana.intrieri@dc.gov	Verizon	2022155586	Cellular	iPhone 7	415.20
JERRY	CHAPIN	jerry.chapin2@dc.gov	AT&T	2022790215	Cellular	iphone 6	150.00
DESIREE	HOFFMAN	desiree.hoffman@dc.gov	AT&T	2022790215	Cellular	iphone 6	291.97
CALVIN	OSBORNE	calvin.osborne@dc.gov	AT&T	2022868273	Cellular	iphone 6S	445.31
MIA	ODELL	mia.odell@dc.gov	AT&T	2022975049	Cellular	iPhone 7	150.00
KIMBERLY	AFOAKWAH	kimberly.afoakwah@dc.gov	AT&T	2023403265	Cellular	iphone 6	291.69
JENNIFER	WAITS	jennifer.waits@dc.gov	AT&T	2023408426	Cellular	iphone 6S	145.77
JENNY	KESSLER	jenny.kessler@dc.gov	AT&T	2023940834	Cellular	iPhone 7	146.84
RACHEL	WILLIAMS	rachel.williams3@dc.gov	AT&T	2023942869	Cellular	iphone 6S	494.31
BRYAN	HUM	eom.atc@dc.gov	AT&T	2023949995	Cellular	iPhone 7	150.00
RACHEL	WILLIAMS	rachel.williams3@dc.gov	AT&T	2023942869	Cellular	iphone 6S	148.12
BRYAN	HUM	eom.atc@dc.gov	AT&T	2023949995	Cellular	iPhone 7	270.09
WILLIAM	PAIGE	william.paige@dc.gov	AT&T	2027165137	Cellular	iphone 6S	396.12
KYLE	WINSLOW	kyle.winslow@dc.gov	AT&T	2027165137	Cellular	iphone 6S	591.08
DEBORAH	GEORGEJOHNSON	deborah.georgejohnson@dc.gov	AT&T	2022975175	Cellular	iphone 6	75.86
EUGENE	KINLOW	eugene.kinlow@dc.gov	AT&T	2023413857	Cellular	iphone 6	591.08
JOE	LEONARD	joe.leonard@dc.gov	AT&T	2024128795	Cellular	iphone 6S	683.01
MICHAELA	MILLER	michaela.miller@dc.gov	AT&T	2026790963	Cellular	iphone 6S	591.36
GERALD	MONTOYA	gerald.montoya2@dc.gov	AT&T	2027463072	Cellular	iphone 6S	591.08
NIKOLAS	NARTOWICZ	nikolas.nartowicz@dc.gov	AT&T	2022156740	Cellular	iphone 6S	653.93
BEVERLY	PERRY	beverly.perry@dc.gov	AT&T	2022571423	Cellular	iphone 6S	586.93
GIANELLE	RIVERA	gianelle.rivera@dc.gov	AT&T	2022562538	Cellular	iphone 6S	415.20
MATTHEW	SCALF	matthew.scalf@dc.gov	AT&T	2024314648	Cellular	iPhone 6S Plus	148.40
TOMAS	TALAMANTE	tomas.talamante@dc.gov	AT&T	2023747897	Cellular	iphone 6	150.00
GIAVANNA	WHITE	giavanna.white@dc.gov	AT&T	2024128483	Cellular	iPhone 7	291.97
TOTAL:							\$11755.72

- b. A list of all vehicles owned, leased, or otherwise used by the Office and to whom the vehicle is assigned.

OSA does not own, lease, or otherwise use any vehicles.

- c. A list of employee bonuses or special award pay granted in FY18 and FY19, to date.

There were no employee bonuses or special award payments paid in FY18 or FY19, to date.

- d. A list of travel expenses, itemized by employee.

OSA Travel FY2018					
Employee Name	Conference/Purpose	Destination	Date	Airfare	Lodging
Beverly Perry	Chicago Council of Global Affairs – Paris Agreement	Chicago, IL	12/4/2017	\$ 738.40	
Beverly Perry	International Council of Shopping Centers	Las Vegas, NV	5/19/18 - 5/22/18	\$ 820.07	\$ 1,213.17
Beverly Perry	United States Conference of Mayors	Columbia, SC	9/26/18-9/30/18	\$ 405.40	
Subtotal				\$ 1,963.87	\$ 1,213.17
Grand Total					\$ 3,177.04
OFRA Travel FY2018					
Employee Name	Conference/Purpose	Destination	Date	Airfare	Lodging
Declan Kingland	United States Conference of Mayors	Boston, MA	5/21/18-5/22/18	\$ 352.39	\$ 230.55
Tomas Talamante	United States Conference of Mayors	Boston, MA	5/21/18-5/22/18	\$ 352.39	\$ 230.55
Tomas Talamante	Federation of Canadian Municipalities	Halifax, Nova Scotia	5/31/18-6/3/2018	\$ 483.81	\$ -
Rachel Williams	League of Women Voters Convention	Chicago, IL	6/28/18-6/30/18	\$ 600.96	\$ 713.09
Rachel Williams	National Association of Counties	Nashville, TN	7/12/18-7/16/18	\$ 399.96	\$ 869.75

Declan Kingland	National Association of Counties	Nashville, TN	7/12/18-7/16/18	\$ 592.96	\$ 869.75
Tomas Talamante	National Association of Counties	Nashville, TN	7/13/18-7/15/18	\$ 565.96	\$ 486.74
Eugene Kinlow	National Association of Counties	Nashville, TN	7/13/18-7/16/18	\$ 592.96	\$ 672.48
Rachel Williams	National Caucus of State Legislators	Los Angeles, CA	7/29/18-8/2/18	\$ 393.39	\$ 875.92
Eugene Kinlow	National Caucus of State Legislators	Los Angeles, CA	7/29/18-8/2/18	\$ 576.60	\$ 681.03
Declan Kingland	National Caucus of State Legislators	Los Angeles, CA	7/29/18-8/2/18	\$ 646.00	\$ 875.92
Rachel Williams	American Legislative Exchange Council	New Orleans, LA	8/7/18-8/11/18	\$ 289.77	\$ 804.27
Eugene Kinlow	American Legislative Exchange Council	New Orleans, LA	8/7/18-8/13/18	\$ 683.40	\$ 804.27
Tomas Talamante	Milan Food Policy Pact Conference	Tel Aviv, Ben Gurion	9/1/18-9/7/18	\$ 810.60	\$ 652.44
Tomas Talamante	United States Conference of Mayors	Columbia, SC	9/26/18-9/30/18	\$ 405.40	-
Subtotal				\$7,746.55	\$ 8,766.76
Grand Total					\$ 16,513.31

- e. A list of the total overtime and workman's compensation payments paid in FY18 and FY19 to date.

Giavanna White received \$238.00 in FY18 in overtime pay.

8. Please provide a chart showing your office’s approved budget and actual spending, by division, for FY18 and FY19 to date. In addition, please describe any variance between fiscal year appropriations and actual expenditures.

Fund	FY	Division	Budget	Actual Expend	Intra-District Adva	Encumbrance	Pre - Encumbrance	Avail Balance	Variance Explanation
Local	2018	AGENCY MANAGEMENT	\$1,145,473	\$1,067,292	\$0	\$0	\$0	\$78,181	Under spending in contractual services
		OPLA	\$981,582	\$922,136	\$0	\$0	\$0	\$59,446	Salary lapse from vacant positions
		OFRA	\$756,948	\$611,282	\$0	\$0	\$0	\$145,666	Salary lapse from vacant positions + Under spending in contractual services & supplies
		STATEHOOD	\$0	\$0	\$0	\$0	\$0	\$0	
		2018 Total	\$2,884,003	\$2,600,710	\$0	\$0	\$0	\$283,293	
	2019	AGENCY MANAGEMENT	\$461,816	\$159,643	\$2,500	\$0	\$0	\$299,673	
		OPLA	\$1,018,593	\$258,421	\$0	\$0	\$0	\$804,498	
		OFRA	\$736,867	\$238,401	\$990	\$0	\$121,054	\$1,333,443	
		STATEHOOD	\$1,001,345	\$0	\$0	\$0	\$0	\$1,001,345	
		2019 (YTD) Total	\$3,218,621	\$656,465	\$3,490	\$0	\$121,054	\$3,438,959	

9. Please list any reprogramming, in or out, which occurred in FY18 or FY19 to date. For each reprogramming, please list the total amount of the reprogramming, the original purposes for which the funds were dedicated, and the reprogrammed use of funds.

The Office of the Senior Advisor (OSA) reprogrammed \$10,000 to OSA telecommunications. We moved OPLA to the Mayor’s bullpen. We transferred funds so we could move the phone lines.

10. Please provide a complete accounting for all intra-District transfers received by or transferred from the office during FY18 or FY19 to date.

AI0 - Office of the Senior Advisor	FY 2018 - FY 2019 Intra-District Transfers					
Fiscal Year	Seller Agency	Buyer Agency	Service Description	Fund	Service Period	Total Amount
FY 2018	OCP	OSA	Purchase Card	Local	10/01/17 - 09/30/18	\$ 172,731.41
FY 2018	OCTO	OSA	RTS	Local	10/01/17 - 09/30/18	\$ 7,297.43
	Total					\$ 180,028.84
FY 2019	OCP	OSA	Purchase Card	Local	10/01/18 - 09/30/19	\$ 26,245.51
	Total					\$ 26,245.51

11. Please identify any special purpose revenue accounts maintained by, used by, or available for use by your office during FY18 or FY19 to date. For each account, please list the following:

There were no special purpose revenue accounts maintained in FY18.

- a. The revenue source name and code.
- b. The source of funding.
- c. A description of the program that generates the funds.
- d. The amount of funds generated by each source or program in FY18 and FY19 to date.
- e. Expenditures of funds, including the purpose of each expenditure, for FY18 and FY19 to date.

12. Did the Office participate in any ethics trainings in FY 2018 and FY 2019 to date?

All OSA staff is required to take ethics training through the Office of the General Counsel and Mayor's Office of Talent and Appointments, in coordination with the Board of Ethics and Government Accountability. All staff is currently in compliance with this training requirement.

13. Please provide a list of types and dates of training/information sessions the Office has planned for FY19.

OSA encourages all employees to participate in training sessions offered by DCHR and maintain training requirements for any licenses or certifications, such as bar memberships. OSA itself does not have any training or information sessions planned for FY19.

14. What are the top challenges the Office is presently facing?

The greatest challenge facing the office is ardently promoting statehood to people who live outside the District of Columbia.

15. What areas (e.g., financial training, procedural training, etc.) do you think the Office needs assistance with?

OSA staff members have taken purchase card training, statement of work trainings, and PASS buyer training. In the coming months of FY2019, other staff members will also take these trainings.

16. Please provide a complete list of the Office's current programs, community events, and initiatives. Include a brief description and general time frame for each item.

OSA does not sponsor programs, community events, or initiatives. OSA does sponsor the New Columbia Statehood Commission, which seeks DC statehood for residents.

17. What has the Office done in the past year to make the activities of the Office more transparent to the public? In addition, please identify ways in which the activities of the Office and information retained by the Office could be made more transparent.

OPLA: OPLA engages regularly with members of the public, including advocates and stakeholders, related to legislative issues. In addition, OPLA interacts daily with the Council of the District of Columbia.

OFRA: In an effort to expand opportunities for DC youth to gain exposure to politics, OFRA worked with Marion Barry Summer Youth Employment Program (MBSYEP) to establish summer opportunities for MBSYEP participants on Capitol Hill and provides internships via the DC LEAD internship program.

18. What collaborations, initiatives, or programs have been successful in FY18 and FY19 to date? Why were they successful?

OFRA: The collaboration with Congresswoman Norton's office has secured and preserved SOAR, DC Tag and provide for the first time dedicated funding for WMATA which impacts the lives of the citizens in all eights wards in Washington, DC.

OPLA: OPLA works closely with District agencies and Council offices to achieve desired legislative outcomes for District residents.

19. How does the Office solicit feedback from customers? Please describe.

- a. What has the Office learned from this feedback?
- b. How has the Office changed its practices as a result of such feedback?

The Office of the Senior Advisor does not have external customers in the traditional sense, but we do solicit feedback from external stakeholders. Our main forms of feedback are through engagement with the Council, Congress, and other advocacy groups. Each of our offices maintains an open-door policy with regard to meeting with stakeholder groups to discuss issues of interest or concern. These interactions help us to better understand a broad range of views regarding various legislative and policy issues.

20. Please provide a list of all studies, research papers, and analyses ("studies") the Office requested, prepared, or contracted for FY18 and FY19 to date. Please state the status and purpose of each study.

"Washington, DC Statehood: 2018 Year in Review and Path Forward", was prepared and published in [FY18]. The purpose of the study was to provide a framework for OSA's Congressional strategy to achieve statehood.

21. How many community based grants were awarded in FY 2018?

There were no community-based grants awarded in FY18.

22. How many community based grants have been or will be awarded in FY 2019?

There have been no community-based grants awarded in FY19.

23. Please list each contract, procurement, lease, and grant (contract) awarded or entered into by your office during FY 2018 – FY 2019 to date. For each contract, please provide the following information where applicable.

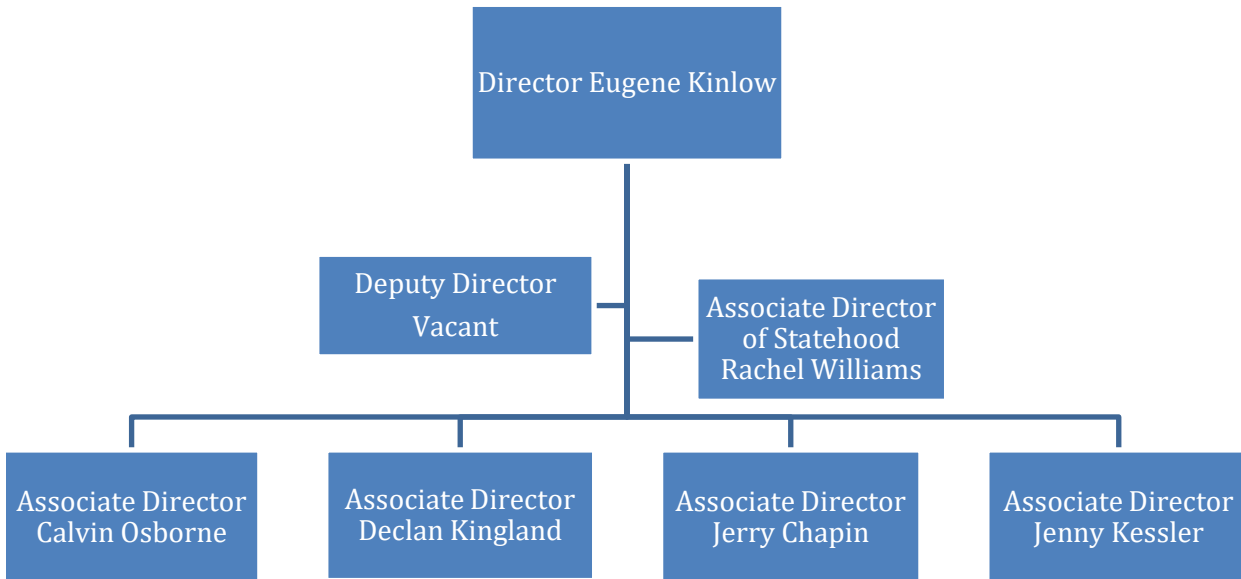
Please see the chart on the following page.

FY2018 – FY2019 List of Contracts

Contract / Procurement vs Grant	Vendor / Grantee Name	Contract / Grant Number	Original Contract Amount	FY18 Funding Amount	Funding Source	Nature of Contract	Contract Term	Competitively bid?
Contract	METROPOLITAN OFFICE PRODUCTS	PO574977	\$6,105	\$6,105	Local	office supplies	n/a	yes
Contract	METROPOLITAN OFFICE PRODUCTS	PO574979	\$6,105	\$6,105	Local	office supplies	n/a	yes
Contract	DELL COMPUTER CORP	PO577576	\$6,836	\$6,836	Local	computers for the office	n/a	yes
Contract	POLITICO LLC	PO577822	\$7,597	\$7,597	Local	Congressional information service	n/a	yes
Contract/ Membership	NATIONAL LEAGUE OF CITIES INC	PO577936	\$24,554	\$24,554	Local	Membership dues	n/a	no
Contract	DELL COMPUTER CORP	PO578735	\$5,644	\$5,644	Local	Computers for the office	n/a	yes
Contract	MERIDIAN ZERO DEGREES, LLC	PO579386	\$86,878	\$86,878	Local	Kiosks for statehood	n/a	yes
Contract/ Membership	AFRICAN AMERICAN MAYORS ASSOC	PO580409	\$20,000	\$20,000	Local	Membership dues	n/a	no
Contract	THE PROSPER GROUP CORPORATION	PO582125	\$4,500	\$4,500	Local	SMS/text messages for statehood	n/a	yes
Procurement	HALES CREATIVE SOLUTIONS	PO582571	\$136,000	\$136,000	Local	RFP	Fiscal year	yes
Contract/ Membership	UNITED STATES CONFERENCE OF MA	PO582858	\$26,216	\$26,216	Local	Membership dues	n/a	no
Contract/ Membership	NATIONAL ASSOC. OF COUNTIES	PO582864	\$12,034	\$12,034	Local	Membership dues	n/a	no
Contract	THE PROSPER GROUP CORPORATION	PO582902	\$25,750	\$25,750	Local	SMS/text messages for statehood	n/a	yes
Contract	LABELS AND LIST INC.	PO583648	\$47,444	\$47,444	Local	Email lists for statehood	n/a	yes
Contract	ALINEA PROMOS, LLC	PO586442	\$11,325	\$11,325	Local	statehood	n/a	yes
				\$ 426,988				

- a. The nature of the contracting party.
 - b. The nature of the contract, including the end product or service.
 - c. The dollar amount of the contract, including the budgeted amount and the amount actually spent.
 - d. The term of the contract.
 - e. Whether the contract was competitively bid or not.
 - f. Funding source.
24. Did the Office conduct oversight of the organization to which it awards grants to ensure funds are used as intended? If so, how many oversights?
- The OSA does not provide community based grants.
25. Of the organizations that received a community-based grant in FY 2018, how many also received community based grants in FY 2017?
- The OSA does not provide community based grants.
26. Please describe how an organization is selected to receive a community based grant.
- The OSA does not provide community based grants.
27. Did the Office receive any grants in FY 2018? If so, what was the source and duration of the grant(s), and what was it used to accomplish?
- The OSA did not receive any grants in FY18.
28. Has the Office sought any grant opportunities in FY 2019?
- The Office of the Senior Advisor did not seek out any grant opportunities.
29. Does the Office ever request internal or external audits to be conducted on the operation of your office as a precautionary tool?
- No, OSA has not requested an internal or external audit as a precautionary tool.
30. What are the Office's goals going forward in FY2019?
- The goals of the Office of the Senior Advisor is to continue providing policy analysis and strategy to the Mayor's Office, in order for the administration to continue making lasting changes that improve the lives of District residents in all eight wards. The Office will continue to be a tireless advocate for the District of Columbia to achieve Statehood for the over 700,000 citizens that call the city home. In FY19, our Statehood approach will consist of promoting statehood by receiving a floor vote in Congress on the DC Admission Act, educating citizens of different states about the importance of statehood on multiple media platforms, and receiving feedback from focus groups in targeted states. Additionally, the Office, through OPLA, will continue to advance the Mayor's legislative agenda before the Council of the District of Columbia.

Attachment 1: Office of Federal and Regional Affairs Organizational Chart



Attachment 2: Office of Policy and Legislative Affairs Organizational Chart

