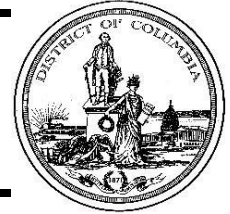


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**OFFICE OF AT-LARGE COUNCILMEMBER ANITA BONDS**  
CHAIR, COMMITTEE ON HOUSING & NEIGHBORHOOD  
REVITALIZATION

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January 22, 2020

Laura Newland, Director  
Department of Aging and Community Living  
500 K Street, NE  
Washington, DC 20002

Dear Director Newland:

The annual performance hearing for the District of Columbia Department of Aging and Community Living is scheduled for **February 25, 2020, beginning at 10:00 AM in Room 500**. The government witness(es) for the agency will testify following public testimony. Please plan to arrive in time to listen to the entirety of the public testimony presented with respect to the agency.

Written pre-hearing questions for your agency are attached. So that I may make effective use of your responses, please provide **six hard copies** of your responses as well as an electronic version in Microsoft Word format **by the close of business on February 18, 2020**.

If you feel that I could use additional information outside the scope of the attached questions, please feel free to include an additional written statement. If your office requires clarification of any of the attached questions, please contact the Committee's Legislative Counsel, Aimellia Siemson, at (202) 724-8153 or [asiemson@dccouncil.us](mailto:asiemson@dccouncil.us). Thank you in advance for your timely and comprehensive response.

Sincerely,

Anita Bonds  
At-Large Councilmember  
Chairperson, Committee on Housing and Neighborhood Revitalization

## District of Columbia Department of Aging and Community Living

### Performance Questions

1. Please provide a current organizational chart for the agency, including the number of vacant, frozen, and filled positions in each division or subdivision. Include the names and titles of all senior personnel and note the date that the information was collected on the chart.

Please see Attachment Q1 – DACL’s Organizational Chart.

- a. Please provide an explanation of the roles and responsibilities of each division and subdivision.

#### **Office of the Director (OD)**

The OD provides the vision, planning, and leadership for the Department of Aging and Community Living, including executive management, policy, legal, strategic and financial planning, communications, and resource management. OD also manages, leads, and directs all programs and services of DACL. Additionally, OD controls and disseminates work assignments and coordinates agency operations to ensure the attainment of the agency’s mission statement and achievement of the goals and objectives of DACL’s State Plan.

#### **General Services**

The General Services team is responsible for building support services, risk management, human resource services, information technology, and overall administrative support for DACL. The team also works to improve the efficiencies of basic services and provide the most cost-effective management and maintenance resources.

#### **Social Services Division (SSD)**

SSD is a newly named division that is the direct service arm of DACL. This division includes the social work and information services teams within DACL. SSD also includes the Aging and Disability Resource Center, which houses Information & Referral/Assistance, Medicaid Enrollment, and State Health Insurance assistance Program (SHIP) teams. SSD engages and supports older adults (60 years and older), adults with disabilities (18 years and older), and their caregivers.

#### *Social Work/Nursing Home Transition Teams*

This program consists of the three Adult Protective Services teams, the community social work team and the nursing home transition team. In addition to support the work of the teams there is a housing coordinator who provides information and support to assist with the transition of nursing home residents as they return to the community.

## **District of Columbia Department of Aging and Community Living**

### *Aging and Disability Resource Center (ADRC)*

ADRC provides information and referral services, by phone and in person, for individuals seeking information about long term services and supports for seniors and adults with disabilities. ADRC includes the following teams:

#### *Information and Referral/ Assistance*

This team staffs the call center and provides information on programs and services available in the District and makes referrals to DACL and community-based services.

#### *Medicaid Enrollment*

This team provides information about eligibility and enrollment in the Elderly and Persons with Physical Disabilities (EPD) Waiver. The EPD Waiver is a combination of home- and community-based long- term care services designed to help older adults and adults with disabilities stay in their home, as an alternative to institutionalized care. This team provides streamlined access to the EPD Waiver program by providing assistance with application, submission, and linkage to EPD Waiver case management. ADRC has one staff member dedicated to State Plan Medicaid Adult Day Health Program (ADHP) enrollment. ADHP enrollment consists of receiving and processing ADHP referrals from Delmarva Foundation (DHCF provider) and completing a home visit and Person-Centered Plan for each interested ADHP applicant.

#### *State Health Insurance counseling Project (SHIP)*

SHIP provides free health insurance information, education, and counseling services to Medicare beneficiaries. In addition to assistance with health insurance issues, HICP also assists seniors with resolving unpaid medical bills and resolving pharmacy issues.

### **External Affairs and Communications (EAC)**

The External Affairs and Communication (EAC) team is charged with providing information about the events and activities of the DACL to residents of the District of Columbia. Additional responsibilities include: developing and articulating the vision for the agency to key administration stakeholders and the community; and developing, championing, and implementing a comprehensive integrated strategic communications plan. This includes developing, directing, coordinating, and administering policies relating to all of the agency's internal and external communications. The team manages all press inquiries and oversees the informational content provided on the agency's website and social media sites. The team also includes the data team (3 FTEs) that was created with the Senior Strategic Plan legislation.

## District of Columbia Department of Aging and Community Living

### Budget and Performance Management

The Budget and Performance Management team develops, maintains, and monitors the agency's fiscal and performance plans to achieve the agency goals, while conforming to the policies and procedures established by the District and the federal government. Fiscal responsibility and transparency are achieved through the review of procurement transactions, expenditures, and projections.

### Programs

The Programs team oversees the programmatic and fiscal efficiency of senior services provided through DACL grants and contracts. This includes the effective planning, developing, coordinating, and implementation of programs and services to ensure a continuum of services are available for District seniors, adults with disabilities, and caregivers. This team monitors DACL's Senior Service Network (SSN) comprised of 20 community-based, non-profit, and private organizations that operate 40 programs in all eight wards to the District's older adult residents. These programs support a broad range of legal, nutrition, social, and health services for older adults as well as support programs for caregivers.

- b. Please provide a narrative explanation of any changes to the organizational chart made during the previous year.

The transfer of Adult Protective Services (APS) from the Department of Human Services effective October 1, 2020, was the most significant change to DACL's organizational chart. Related to the transfer, DACL renamed its direct services teams to the Social Service Division, adding the three APS teams to the two social work teams DACL already had on staff. DACL also added additional staff to handle the additional administrative duties related to the transfer, including a Legal Fellow, Clinical Director, IT Specialist, HR Specialist, and Deputy Director of Communications. The Senior Strategic Plan legislation also created a data team to create a 10-year strategic plan. This team is joining the External Affairs and Communications team. DACL also had normal agency staff turnover throughout the year.

2. Please provide a current Schedule A for the agency which identifies each position by program and activity, with the employee's title/position, salary, fringe benefits, and length of time with the agency. Please note the date that the information was collected. The Schedule A should also indicate if the position is continuing/term/temporary/contract or if it is vacant or frozen. Please separate salary and fringe and indicate whether the position must be filled to comply with federal or local law.

Please see Attachment Q2 – Schedule A.



**District of Columbia Department of Aging and Community Living**

3. Please list all employees detailed to or from your agency. For each employee identified, please provide the name of the agency the employee is detailed to or from, the reason for the detail, the date of the detail, and the employee’s projected date of return.

Name/Position	Agency Detailed From	Reason for Detail	Date of Detail	Projected Date of Return
Holt, Lance (Staff Assistant)	OCA	Reassignment	04/09/19	n/a: employee will move to DACL’s Schedule A in FY21

4. Please provide the Committee with:
- a. A list of all employees who received or retained cellphones, personal digital assistants, or similar communications devices at agency expense in FY19 and FY20, to date;

Please see Attachment Q4a – Technology Equipment Inventory

- b. A list of all vehicles owned, leased, or otherwise used by the agency and to whom the vehicle is assigned, as well as a description of all vehicle accidents involving the agency’s vehicles in FY19 and FY20, to date;

Please see Attachment Q4b – Vehicles List

- c. A list of travel expenses, arranged by employee for FY19 and FY20, to date, including the justification for travel; and

Please see Attachment Q4c – Travel Expenses

- d. A list of the total workers’ compensation payments paid in FY19 and FY20, to date, including the number of employees who received workers’ compensation payments, in what amounts, and for what reasons.

**District of Columbia Department of Aging and Community Living**

DACL currently has one open claim receiving benefits in FY20 (and FY19). The claim receiving benefits is from an incident in 1976.

	Payment Type		Grand Total
	Medical	Indemnity	
<b>Payments by Fiscal Year</b>			
FY 2019	\$2,904.27	\$19,041.46	\$21,945.73
FY 2020	\$2,436.57	\$5,999.76	\$8,436.33
<b>Grand Total</b>	<b>\$5,340.84</b>	<b>\$25,041.22</b>	<b>\$30,382.06</b>

5. For FY19 and FY20, to date, what was the total cost for mobile communications and devices, including equipment and service plans?

FY19 Communications	\$58,999.69
FY19 Equipment	\$ 969.98
<b>Total</b>	<b>\$59,969.67</b>
FY20 Communications	\$8,422.27
FY20 Equipment	\$0
<b>Total</b>	<b>\$8,422.27</b>

6. For FY19 and FY20, to date, please list all intra-District transfers to or from the agency.

Please see Attachment Q6 – Intra-District Transfers.

7. For FY19 and FY20, to date, please identify any special purpose revenue funds maintained by, used by, or available for use by the agency. For each fund identified, provide:
- The revenue source name and code;
  - The source of funding;
  - A description of the program that generates the funds;
  - The amount of funds generated by each source or program;
  - Expenditures of funds, including the purpose of each expenditure; and
  - The current fund balance.

DACL does not have any special purpose revenue funds maintained by, used by, or available for use by the agency for FY19 and FY20 to date.

8. For FY19 and FY20, to date, please list any purchase card spending by the agency, the employee making each expenditure, and the general purpose for each expenditure.

Please see Attachment Q8 – FY19 and FY20 Purchase Card Spending.

## **District of Columbia Department of Aging and Community Living**

9. Please list all memoranda of understanding (“MOU”) entered into by your agency during FY19 and FY20, to date, as well as any MOU currently in force. For each, indicate the date on which the MOU was entered and the termination date.

Please see response to Question 6. DACL’s intra-district transfers are done via MOUs.

10. Please list the ways, other than MOU, in which the agency collaborated with analogous agencies in other jurisdictions, with federal agencies, or with non-governmental organizations in FY19 and FY20, to date.

### **DACL and U.S. ACL Collaboration**

The Department of Aging and Community Living (DACL) and the U.S. Administration for Community Living (ACL) work in close collaboration. DACL’s Director and staff regularly engage and are guided by ACL’s Regional Administrator and staff with a focus on policy development, budget guidance, and service coordination. ACL’s Regional Administrator oversees Older Americans Act programming for the District and other regional states. Through this collaboration, it allows DACL to keep in close communication with other state regional partners to compare programs, discuss challenges, and solutions to these challenges. In addition, DACL participates in ACL’s annual Regional State Unit on Aging and Area Agencies on Aging Conference with its partners to share ideas and to access training on federal requirements and policies.

### **Money Smart for Older Adults**

DACL and the Elder Abuse Prevention Committee implement the “Money Smart for Older Adults” (MSOA) consumer education program in collaboration with the U.S. Consumer Financial Protection Bureau (CFPB). MSOA is an instructor-led training, developed jointly by the Federal Deposit Insurance Corporation (FDIC) and CFPB. The module provides awareness among older adults and their caregivers on how to prevent elder financial exploitation and to encourage advance planning and informed financial decision-making.

### **Senior Service Network**

DACL collaborates continuously with the agency’s Senior Service Network, which is comprised of over 22 community based non-profit and private organizations that operate 40+ programs that provide vital, life-sustaining and life enhancing services and supports to the District’s older adults (age 60 and older), adults with disabilities, and their caregivers.

**District of Columbia Department of Aging and Community Living**

**DACL & University Partners**

**Howard University Multidisciplinary Center for Gerontology Partnership**

DACL and the Howard University Multidisciplinary Center for Gerontology have begun collaborating in FY20 to provide professional development opportunities for Howard graduate students and training for DACL’s direct services staff. The collaboration’s goal is two-fold: 1) to create a stronger pipeline of high-performing social workers who choose aging as a field of practice; and 2) provide training to DACL’s current workforce to stay abreast of best-practices in the aging field.

**George Washington University Departments of Clinical Research & Leadership and Neurology**

DACL and George Washington University (GW) are collaborating in FY20 in caregiver research. GW has received a grant from DC Health to conduct research on services and supports for people diagnosed with Alzheimer’s Disease and other Related Dementias (ADRD). DACL is working with GW on the development of the research questions and identification of individuals to participate in focus groups and interviews.

**DC Office of the Attorney General (OAG)**

DACL and OAG work closely together on referrals from Adult Protective Services to OAG for potential criminal and civil prosecution of elder abuse. The District’s Collaborative Training and Response for Older Victims (DC TROV) DACL participates in DC TROV’s multidisciplinary team dedicated to improving the response to victims of elder abuse.

11. Please provide a table showing your agency’s Council-approved original budget, revised budget (after reprogrammings, etc.), and actual spending, by program and activity, for FY19, FY20, and the first quarter of FY20.
  - a. For each program and activity, please include total budget and break down the budget by funding source (federal, local, special purpose revenue, or intra-district funds).
  - b. Include any over- or under-spending. Explain any variances between fiscal year appropriations and actual expenditures for FY19 and FY20 for each program and activity code.
  - c. Attach the cost allocation plans for FY19 and FY20.
  - d. In FY19 or FY20, did the agency have any federal funds that lapsed? If so, please provide a full accounting, including amounts, fund sources (e.g. grant name), and reason the funds were not fully expended.

Please see Attachment Q11abd – FY19 and FY20 DACL Budget.  
Please see Attachment Q11c – Cost Allocation Plan.

## District of Columbia Department of Aging and Community Living

12. Please provide as an attachment a chart showing the agency's federal funding by program for FY18 and FY19, to date.

Please see Attachment Q12 – FY18, FY19, & FY20 Federal funding by Program.

13. With respect to capital projects, please provide.

- a. A list of all capital projects in the financial plan.

Please see responses to 13b and 13c.

- b. For FY18, FY19, and FY20, an update on all capital projects under the agency's purview, including a status report on each project, the timeframe for project completion, the amount budgeted, actual dollars spent, and any remaining balances, to date.

**Senior Wellness Centers Refreshers and Expansion:** The Department of General Services (DGS) was originally given a capital budget of \$4 million for upgrades and interior refreshers at six (6) of DACL's Senior Wellness Centers. DGS worked with DACL on the scope of work for the various sites, and in FY18 engaged the services of an architectural and engineering firm for the design and permitting services. Construction kicked off at the end of FY19, and DGS is nearing the end of the project for each site. The projects will all be finished before the end of this fiscal year.

In DACL's FY19 budget there was an additional \$1.5 million added for the expansion of Model Cities Wellness Center (Ward 5) and Congress Heights Senior Wellness Center (Ward 8). DGS and DACL have worked with participant task forces at both senior wellness centers on the scope of the expansions and have come up with final designs for both sites. The work will be submitted for solicitation for construction and DGS is planning the construction to start in the Summer of 2020, with a projected completion in the middle of fiscal year FY21.

The total amount for this project is \$5.5M and the total amount spent to date is \$3,876,194.16. Remaining balance to date is \$1,658,053.84. This includes \$1,500,000.00 for the Model Cities and Congress Heights expansion projects. All remaining funds will be spent on the projects.

- c. An update on all capital projects planned for FY20, FY21, FY22, FY23, and FY24.

In FY2018, the Mayor announced an \$11.4 million investment for a new senior wellness center in Ward 8, projected to be completed in FY2023 (FY22: \$2.5M, FY23: \$8.4M). In FY19, this project was moved up in the capital schedule for completion in FY2021. DGS and DACL are finalizing sites for the new wellness center.

## District of Columbia Department of Aging and Community Living

- d. A description of whether the capital projects begun, in progress, or concluded in FY18, FY19, or FY20, to date, had an impact on the operating budget of the agency. If so, please provide an accounting of such impact.

No capital projects have had an impact on the agency's operating budget.

14. Please provide a list of all budget enhancement requests (including capital improvement needs) for FY19 and FY20, to date. For each, include a description of the need and the amount of funding requested.

DACL works with the Mayor's Office of Budget and Performance Management and the Office of the Deputy Mayor for Health and Human Services on developing each fiscal year budget. The Mayor's budgets for FY19 and FY20, as submitted to the Council, maintained the appropriate funding levels to operate the agency's services and programs.

15. Please list, in chronological order, each reprogramming in FY19 and FY20, to date, that impacted the agency, including those that moved funds into the agency, out of the agency, and within the agency. Include the revised, final budget for your agency after the reprogrammings for FY19 and FY20, to date. For each reprogramming, list the date, amount, rationale, and reprogramming number.

Please see Attachment Q15 – FY19 & FY20 Reprogrammings.

16. Please list each grant or sub-grant received by your agency in FY19 and FY20, to date. List the date, amount, source, purpose of the grant or sub-grant received, and amount expended.
  - a. How many FTEs are dependent on grant funding? What are the terms of this funding? If it is set to expire, what plans, if any, are in place to continue funding the FTEs?

Please see Attachment Q16 – FY19 & FY20 Grants, Sub-Grants, and Multi-Year Grants Received by DACL.

17. Please list each contract, procurement, and lease, entered into, extended, and option years exercised by your agency during FY19 and FY20, to date. For each contract, please provide the following information, where applicable:
  - a. The name of the contracting party;
  - b. The nature of the contract, including the end product or service;
  - c. The dollar amount of the contract, including amount budgeted and amount actually spent;
  - d. The term of the contract;
  - e. Whether the contract was competitively bid;
  - f. The name of the agency's contract monitor and the results of any monitoring activity; and
  - g. The funding source.

## District of Columbia Department of Aging and Community Living

Please see Attachment Q17 – FY19 and FY20 Contracts.

18. Please list all pending lawsuits that name the agency as a party. Identify which cases on the list are lawsuits that potentially expose the District to significant financial liability or will result in a change in agency practices, and describe the current status of the litigation. Please provide the extent of each claim, regardless of its likelihood of success. For those identified, please include an explanation about the issues involved in each case.

*Veronica Butler v. DACL*, OEA Matter No. 1601-0132-14. Filed in September 2014, employee appealed her termination contending her due process rights were violated when DACL did not provide her with an advance written notice of the charges against her; that DACL did not establish it had cause to discipline her for being absent from work; and that she was retaliated against for filing a discrimination complaint with the EEOC. Employee requested that she be reinstated with back pay and benefits. In the initial decision, the administrative judge concluded the employee's retaliation argument was not within OEA's jurisdiction. The judge also found that DACL did not meet its burden of proof to sustain the charges against employee and, therefore, ordered employee's termination be reversed and she be reinstated with back pay and benefits. DACL appealed the decision to the OEA Board, which remanded the case back to the administrative judge for further review. After an evidentiary hearing, the administrative judge found for the employee and awarded her backpay, benefits, and reinstatement. In compliance with OEA's order, employee has received approximately \$438,000 in back pay, was reinstated to a comparable role with another District Government agency, and her benefits are either in the process of, or have already been, restored. The Agency has also settled the attorney's fees portion of the case for \$98,000.

Under the current administration, DACL carefully considers any relevant mitigating or aggravating factors before proposing adverse employment actions against career service employees. In all such cases, the agency works closely with its human resources and general counsel's offices before making any decisions.

*Chantelle Teasdell et al. v. DC, et al.*, Case No. 15-CV-00445-ABJ. Filed in 2015, the case is currently pending in U.S. District Court. Six (6) former employees sued the District of Columbia, the former Executive Director, and former Chief of Staff. The surviving claims allege violations of the DC Whistleblower Protection Act; Age Discrimination in Employment Act; and the DC Human Rights Act. The District entered into settlement agreements with five plaintiffs, leaving Veronica Butler as the sole remaining plaintiff in the case (who is also the appellant in the OEA case immediately above). At an upcoming mediation session, the District will attempt to settle with the sole remaining plaintiff.

Under the current administration, DACL works closely with its human resources and general counsel's offices before taking any adverse personnel actions, including, where appropriate, a careful analysis of any aggravating or mitigating factors.

*Ivy Brown, et al., v. District of Columbia*, Civil Action No. 10-2250 (ESH). Filed in 2010, this lawsuit alleges that the District unlawfully segregated people with disabilities in nursing homes when they were capable of and wanted to live in the community. The primary agencies involved in this litigation are DACL and DHCF. After protracted litigation that

## District of Columbia Department of Aging and Community Living

included several amended complaints by the plaintiffs, a ruling certifying the class action that withstood an interlocutory appeal, and a lengthy bench trial, the court ruled for the District. In its ruling, the court found that there was no single injunction that could remedy the violations alleged by the class members, and that it was a lack of available, affordable housing, as opposed to deficient transition services, that resulted in plaintiffs' continued residence in nursing facilities.

Plaintiffs appealed the ruling to the U.S. Court of Appeals for the D.C. Circuit, which reversed and remanded to the District court, while instructing that the proper question on remand for the trial court is whether the relief plaintiffs' demand in their proposed injunction is reasonable. Plaintiffs' demanded relief includes assuming several functions that are, by regulation, nursing facilities' responsibilities, committing to a set number of discharges each year, and increased reporting. Trial is set for May, although the parties are engaged in settlement negotiations. During the period of litigation, the District has transformed access to and tracking of Medicaid-funded HCBS and the District's nursing home transition team.

19. Please list all settlements entered into by the agency or by the District on behalf of the agency in FY19 or FY20, to date, and provide the parties' names, the amount of the settlement, and if related to litigation, the case name and a brief description of the case. If unrelated to litigation, please describe the underlying issue or reason for the settlement (e.g. administrative complaint, etc.).

See response to Q18. In *Teasdell et. al.* (see case description in the answer to Q18), Employee 4 settled for \$100,000, and Employee 5 settled for \$150,000.

20. Please list the administrative complaints or grievances that the agency received in FY19 and FY20, to date, broken down by source. Please describe the process utilized to respond to any complaints and grievances received and any changes to agency policies or procedures that have resulted from complaints or grievances received. For any complaints or grievances that were resolved in FY19 or FY20, to date, describe the resolution.

DACL did not receive any administrative complaints or grievances in FY19 and FY20, to date.

21. Please describe the agency's procedures for investigating allegations of sexual harassment or misconduct committed by or against its employees. List and describe any allegations received by the agency in FY19 and FY20, to date, whether or not those allegations were resolved.

DACL's sexual harassment policy complies with Mayor's Order 2017-313. All employees who know of incidents of sexual harassment, as well as behavior which may create an intimidating, hostile or offensive work environment, or who are victims of sexual harassment or inappropriate conduct, are to report the sexual harassment or inappropriate conduct to DACL's Sexual Harassment Officer or the supervisor or manager of the employee engaging in inappropriate conduct, or to their own supervisor. If the alleged harasser is the employee's immediate supervisor, then the employee should report the conduct to the alleged harasser's supervisor, or to the Sexual Harassment Officer.



## District of Columbia Department of Aging and Community Living

Any supervisor or manager who receives a complaint or concern regarding sexual harassment or inappropriate conduct must take immediate steps to notify the Sexual Harassment Officer, who will ensure that an investigation is conducted and take other appropriate action. Where there is an allegation of criminal misconduct, after consulting its General Counsel, place the victim and/or the alleged harasser on administrative leave with pay pending final administrative resolution of the complaint or any criminal proceeding. The complainant at his or her choice may report the alleged criminal violation to a law enforcement agency, including the Metropolitan Police Department (MPD). Where either the agency or an appropriate law enforcement officer determines that a criminal violation occurred, the agency shall recommend discipline of the perpetrator up to, and including, termination.

When an allegation of sexual harassment is reported, including allegations of criminal conduct, the agency shall notify the agency's General Counsel, who in turn must notify the Mayor's Office of Legal Counsel (MOLC) of the allegation. Allegations of sexual harassment shall be investigated and resolved as soon as practicable, but no later than sixty (60) days after reporting. The agency or office investigating the charges must provide the employee and the alleged harasser with a written notification of its findings and conclusions after the sixty (60) day period, and shall convey the same to MOLC. The agency shall also require that any employee found to have engaged in inappropriate conduct who is not terminated must attend mandatory sexual harassment training within sixty (60) days of receipt of the findings. Such training is supplemental to any disciplinary actions and must occur even if the employee recently received training.

There have been no allegations of sexual harassment or misconduct received by the agency in FY19 or FY20, to date.

22. Please list and describe any ongoing investigations, audits, or reports on the agency or any employee of the agency, or any investigations, studies, audits, or reports on the agency or any employee of the agency that were completed during FY19 and FY20, to date.

In a December 2018 report, the Office of the DC Auditor found that multiple District agencies, including DACL, made mistakes when submitting travel mileage reimbursement requests. The report also found that the OCFO did not exercise sufficient care when approving employees' submissions. Mistakes were related to errors in the calculation of actual travel and costs, resulting in both over- and/or underpayments to employees. The DACL finding was limited to one employee's incorrect calculation of reimbursable mileage for intraday work travel in her personal car. DACL ceased the incorrect practice immediately after being informed by the Office of Finance and Revenue Management (OFRM) within OCFO of the appropriate process, and proper guidance was given to DACL staff instructing them on how to accurately calculate reimbursable mileage. A preliminary Board of Ethics and Government Accountability (BEGA) investigation prompted by the ODCA's audit findings is underway, and DACL is in discussions with BEGA on a possible resolution.

See also response to Q27.

## District of Columbia Department of Aging and Community Living

23. Please describe any spending pressures the agency experienced in FY19 and any anticipated spending pressures for the remainder of FY20. Include a description of the pressure and the estimated amount. If the spending pressure was in FY19, describe how it was resolved, and if the spending pressure is in FY20, describe any proposed solutions.

Each year DACL works closely with the Executive Office of the Mayor to develop the agency's budget, ensuring that all programs are funded adequately to serve the District's seniors.

DACL faced no spending pressures for FY19.

In FY20, DACL is working closely with the Office of Budget and Performance Management (OBPM) to address additional expenditures related to the build out of DACL headquarters for the transfer of 24 Adult Protective Services (APS) FTEs.

24. Please provide a copy of the agency's FY19 performance plan. Please explain which performance plan objectives were completed in FY20 and whether they were completed on time and within budget. If they were not, please provide an explanation.

Please see Attachment Q24 – DACL FY19 Performance Plan Accountability Report.

DACL met its Key Performance Indicators (KPIs) and workload measures in FY19 on time and within budget. Only one (1) KPI was not met: "Percent of callers looking for information and assistance that heard about 19 services through the agency's outreach efforts." Due to staff changes in our Information & Referral/Assistance unit, this KPI was not closely tracked. The data for this KPI is generated from the "How did client hear about us?" field in our system, which was not a required field. It has now been assigned as a required field. The KPI has also been updated to more accurately reflect the agency's goal to understand the volume of residents seeking information more broadly and capture all outreach. The KPI now reads, "percent of callers seeking information or assistance on DACL-specific programs or services."

DACL continues to work on improving the collection of comprehensive data and using data to improve its programmatic efforts.

25. Please provide a copy of your agency's FY20 performance plan as submitted to the Office of the City Administrator.

Please see Attachment Q25 – DACL FY20 Performance Plan.

26. Please provide the number of FOIA requests for FY19 and FY20, to date, that were submitted to your agency. Include the number granted, partially granted, denied, and pending. In addition, please provide the average response time, the estimated number of FTEs required to process requests, the estimated number of hours spent responding to these requests, and the cost of compliance.

Please see Attachment Q26 – FY2019 FOIA Report.

## District of Columbia Department of Aging and Community Living

Thus far in FY20, DACL has received two FOIA requests: DACL granted one in full and did not have responsive records for the second.

27. Please provide a list of all studies, research papers, reports, and analyses that the agency prepared or contracted for during FY19 and FY20, to date. Please state the status and purpose of each. Please submit a hard copy to the Committee if the study, research paper, report, or analysis is complete.

No new studies, research papers, or analyses were prepared by DACL during FY19 and FY20 to date.

In FY19, DACL contracted with a firm for the re-branding of the agency, and they provided a report on stakeholder interviews. Please see Attachment Q27 – DACL Stakeholder Audit Report.

In addition, the firm conducted an environmental scan of peer units on aging to gather key insights on branding practices.

Please see Attachment Q27b – DACL Environmental Scan.

See also the response to Q22.

28. Provide a list of all publications, brochures and pamphlets prepared by or for the agency during FY19 and FY20 to date.

### **Paid Media:**

*Beacon Newspaper:* Spotlight on Aging (Published Monthly)

*Current Newspaper:* Spotlight on Community Living (Published Monthly, until March 2019)

*The Informer:* Spotlight (Published Monthly)

### **Press Releases/Media Advisories:**

Mayor Bowser Honors District Centenarians (Press Release)

Mayor Bowser Signs Bill Designating DC Office on Aging as the Department on Aging and Community Living (Press Release)

### **Special Event Programs:**

Mayor's Annual Senior Holiday Celebration Program

Mayor's Annual Senior Holiday Celebration Flyer

Mayor's Older Americans Month Breakfast Program

Mayor's Older Americans Month Breakfast Flyer

Mayor's Annual Senior Symposium Program

Mayor's Annual Senior Symposium Flyer

Ms. Senior DC Program

Ms. Senior DC Flyer

Centenarian Salute Program

Centenarian Salute Flyer

Brain Games Competition Flyer

Outreach Event Flyers (one per DACL initiated event, modified to reflect event specifics)

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Senior Telephone Townhall Flyer  
Senior Pride Event Flyer  
Falls Prevention Awareness Day Flyer

### **Program Information Fact Sheets and Flyers:**

DACL Fact Sheet (also published in Spanish, Amharic, Mandarin, French, Vietnamese, and Korean)  
ADRC Trifold  
Caregiver Respite Program Flyer  
Community Transition Program Flyer  
Community Dining Sites by Ward Flyer  
LGBTQ Programs Flyer  
LGBTQ Advisory Committee Flyer  
Safe at Home Flyer (also published in Spanish, Amharic, Mandarin, French, Vietnamese, and Korean)  
EPD Waiver Flyer  
Fit & Well Seniors Flyer  
Medicaid SNAP Flyer (English and Spanish)  
Saturday Respite Flyer  
Citywide Money Management Program  
Grandparent Caregiver Transportation Program Flyer  
Ambassador Program Flyer  
Volunteer Caregiver Respite Program Flyer  
Senior Wellness Center Flyer (English and Spanish)  
Health Insurance Counseling Project flyer  
Health Insurance Counseling Project cards  
Senior Transportation Options Flyer  
Qualified Medicare Beneficiary Program Flyer (English, Chinese, Spanish, and Amharic)  
Housing Resources Flyer

### **Publications:**

2019 – 2022 DCOA State Plan on Aging  
EPD Waiver Self-Enrollment Packet  
Notice of Funding Availability-FY 2021 Alzheimer’s Disease (ADRD) Competitive Grant  
Notice of Funding Availability-Fiscal Year 2020 DC Office on Aging Day Care Competitive Grant  
Notice of Funding Availability-Fiscal Year 2020 Department of Aging and Community Living Senior LGBTQ Program Competitive Grant

29. Please separately list each employee whose salary was \$100,000 or more in FY19 and FY20, to date. Provide the name, position number, position title, program, activity, salary, and fringe. In addition, state the amount of any overtime or bonus pay received by each employee on the list.

Please see Attachment Q29 – Salaries.

30. Please list in descending order the top 25 overtime earners in your agency in FY19 and FY20, to date, if applicable. For each, state the employee’s name, position number,

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position title, program, activity, salary, fringe, and the aggregate amount of overtime pay earned.

No DACL staff received overtime payments in FY19. Adult Protective Services (APS) was transferred to DACL effective October 1, 2020. DACL compensates overtime for APS personnel due to the nature of their work.

Position Number	Name	Activity Code	Program Code	Program & Activity Name	Position Title	Salary	FY20 Fringe (22.3%)	Overtime Pay
00099713	Brewer,Barbara Jane	1000	1010	Agency Management Services	Social Worker	\$100,225.00	\$22,350.18	\$ 3,079.17
00099714	Ndichu,Eric W.	1000	1010	Agency Management Services	Social Worker	\$ 89,997.00	\$20,069.33	\$ 2,696.25
00099703	Johnson,Sammie	1000	1010	Agency Management Services	Social Worker	\$ 81,505.00	\$18,175.62	\$ 1,986.44
00099702	Luster,Joann	1000	1010	Agency Management Services	Social Worker	\$ 92,195.00	\$20,559.49	\$ 780.00
00099720	Silva,Sierra	1000	1010	Agency Management Services	Social Worker	\$ 75,091.00	\$16,745.29	\$ 760.33
00099708	Cacho Sr.,Andrew C	1000	1010	Agency Management Services	Social Worker	\$ 79,367.00	\$17,698.84	\$ 342.84
00099697	Watson-Brooks,Karen Y.	1000	1010	Agency Management Services	Social Worker	\$ 92,195.00	\$20,559.49	\$ 271.74
00099698	Reyes-Negron,Karen	1000	1010	Agency Management Services	Social Worker	\$ 89,997.00	\$20,069.33	\$ 152.87
00099699	Reed,Kevin D.	1000	1010	Agency Management Services	Social Worker	\$ 75,091.00	\$16,745.29	\$ 110.45
00099706	Meyers,Leslie Ross	1000	1010	Agency Management Services	Social Worker	\$ 83,643.00	\$18,652.39	\$ 58.78

31. For FY19 and FY20, to date, please provide a list of employee bonuses or special pay granted that identifies the employee receiving the bonus or special pay, the amount received, and the reason for the bonus or special pay.

In FY19, DACL provided bonus pay to five employees through a Special Act/Service Award for their exemplary work provided to seniors affected by the catastrophic Arthur Capper fire. These employees worked beyond their tour of duty for several months to ensure the Arthur Capper seniors had adequate temporary housing, intensive case management services, meals, and transportation to and from medical appointments.

FY19 Bonus or Special Pay	
Name	Bonus/Special Pay
Lourdine Jean-Francois	\$1,654.70
Melanie Gilliam	\$1,661.56
Vanessa Edwards-Hicks	\$1,707.42
Joel Lucas	\$1,569.54
Angela Fields	\$1,617.50
<b>Total Pay</b>	<b>\$8,211.02</b>

No special employee bonuses or special pay have been granted in FY20.

32. Please provide each collective bargaining agreement that is currently in effect for agency employees. Please include the bargaining unit and the duration of each agreement. Please note if the agency is currently in bargaining and its anticipated completion.

Beginning in FY20, Adult Protective Services employees with the American Federation of State, County and Municipal Employees Local 2401, Comp. Units 1 & 2 transferred to

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DACL from the Department of Human Services. The agency is now under a collective bargaining agreement effective October 1, 2017 through September 30, 2021. The agency is not currently bargaining with units.

Please see Attachment for Q32 – Collective Bargaining Agreement.

33. If there are any boards or commissions associated with your agency, please provide a chart listing the names, confirmation dates, terms, wards of residence, and attendance of each member. Include any vacancies. Please also attach agendas and minutes of each board or commission meeting in FY19 or FY20, to date, if minutes were prepared. Please inform the Committee if the board or commission did not convene during any month.

A roster of current, voting Commissioners, including their Ward of residence, confirmation dates, date their term expires, follows on the table below.

In addition, please see Attachment Q33b – Attendance Record Sheets and Attachment Q33a – Agendas and Minutes.

Please note the Commission is on break each year during the month of August. In FY19, the December 26, 2018 Commission meeting was canceled due to the holidays. Also, the April 24, 2019 Commission meeting was canceled due to DACL’s budget hearing. In FY20, the December 18, 2019 Commission meeting was canceled due to the Mayor’s Senior Holiday party.

<b>Commission on Aging Voting Members</b>					
<i>as of January 29, 2019 (confirmed by Mayor’s Office of Talent and Appointment)</i>					
<b>First Name</b>	<b>Last Name</b>	<b>Confirmation Date</b>	<b>Term Ends</b>	<b>Ward</b>	<b>Appointment Authority</b>
Guleford	Bobo	10/27/2019	10/27/2022	8	Mayor
Carolyn	Matthews	10/28/2014	10/28/2020	1	Mayor
John	Giacomini	6/16/2017	10/28/2019	3	Mayor
Jo-Anne	Hersh	10/28/2019	10/28/2022	2	Mayor
Barbara	Lee	1/22/2018	10/28/2020	5	Mayor
Grace	Lewis	9/25/2017	10/28/2020	5	Mayor
Alice	Love	4/4/2018	10/27/2020	6	Mayor
Nancy	Miranda	10/28/2019	10/28/2022	1	Mayor
Hattie	Pierce	10/28/2019	10/28/2022	5	Mayor
Mary	Taylor	10/27/2017	10/27/2020	7	Mayor
Gloria	Whitfield	10/30/2019	10/28/2022	8	Mayor
Maria	Wilson	5/2/2019	10/28/2022	4	Mayor

By statute, ex officio (non-voting) members of the Commission are the Directors or designees of the Department of Human Services (DHS), the Department of Housing and Community Development (DHCD), the Department of Recreation (DPR), the Department of Transportation (DDOT), the Department of Employment Services (DOES), the Public Library (DCPL), the Chief of the Metropolitan Police Department (MPD), and a member of the Council of the District of Columbia. Ex officio members

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from the Executive branch were identified in the Fall of 2016. The ex-officio member of the D.C. Council is Councilmember Hector Rodriguez.

34. Please list all reports or reporting currently required of the agency in the District of Columbia Code or Municipal Regulations. Provide a description of whether the agency is in compliance with these requirements, and if not, why not (e.g. the purpose behind the requirement is moot, etc.).

<b>Legal Citation</b>	<b>Name of Report</b>	<b>Description</b>
Sections 2(2) and 2(3) of the Act. (D.C. Official Code §§2-1931(2) and 1931(3)).	Language Access Report	DACL submits reports due every quarter and annually to OHR.
D.C. Law 1-24. District of Columbia Act on the Aging and D.C. Law 19-321, as part of District’s Budget Submission to the U.S. Congress.	Agency Performance Plan	DACL submits reports every quarter to OCA. The Agency Performance Annual Report is submitted to Council through performance and budget oversight.
D.C. Act 16-595 the Disability Rights Protection Act of 2006. ODR is lead.	<i>Olmstead</i> Report	DACL submits reports to ODR 30 days after each quarter
D.C. Act 22-130. Law L22-0033. Fiscal Year 2018 Budget Support Act of 2017. Subtitle C. Prior Budget Act. Sec. 7071. Short title. “Prior Budget Support Act Clarification Amendment Act of 2017.” And, the Fiscal Year 2016 Budget Support Act of 2015, D.C. Law 21-36;62 DCR 10905, as amended.	Council Report	DACL submits to Council 30 days after the end 2nd and 4th Quarter of the Fiscal Year (Biannual).
D.C. Law 1-24. District of Columbia Act on the Aging	5-year plan to be reviewed annually	DACL develops the State Plan with the advice of the Commission on Aging and the community.
D.C. Law 5-156, D.C. Official Code § 7-1913, Adult Protective Services Act of 1984	Adult Protective Services annual report	APS report that includes data on cases, costs, and protective services provided. APS transferred to DACL in FY20.
D.C. Law 22-267, D.C. Official Code § 7-503.07, Senior Strategic Plan Amendment Act of 2018	10 year Senior Strategic Plan (SSP)	DACL will soon onboard staff dedicated to developing and implementing the SSP. The legislation had a deadline of December 31, 2019, which is going to be corrected via the BSA to allow DACL the necessary time to onboard personnel, reasonable time for necessary research and information-gathering, community engagement, and for the plan to be developed. The proposal will change the due date of the initial SSP from December 31, 2019, to May 1, 2021.

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35. Please provide a list of any additional training or continuing education opportunities made available to agency employees. For each additional training or continuing education program, please provide the subject of the training, the names of the trainers, and the number of agency employees that were trained.

Each year, the Department of Aging and Community Living staff have the opportunity to attend the National Association of Area Agencies on Aging (n4a) Annual Conference & Trade Show. This is the premier gathering of Area Agency on Aging (AAA) staff and leaders across the country to connect with colleagues and other jurisdictions, learn about new trends in the field, and get educated on critical issues facing the aging network. In FY19, DACL's Deputy Chief of Staff, Director of Communications, and Program Manager attended the conference was hosted in New Orleans and DACL in collaboration with agency grantees presented "Safer Spaces: Creating Community-Driven Programs for LGBTQ Older Adults."

In addition, DACL's Deputy Chief of Staff and Program Manager participated in the N4A Leadership Institute, which is an intensive two-and-a-half-day training on leadership self-assessment, learning new ways to communicate effectively, creative problem-solving, and networking with peers and leaders from the Aging Network. The workshop was presented by Doug Krug, co-founder of Enlightened Leadership Solutions and author of *The Missing Piece in Leadership*.

DACL's Deputy Director and Chief of Staff also attended the Administration for Community Living's Regional III/IV State Unit on Aging and Area Agencies on Aging Conference in Atlanta to receive federal requirements training and assistance from federal partners and to share ideas and solutions to issues with other state regional partners.

DACL's General Counsel attended the American Society on Aging Conference in New Orleans to learn, network and participate in the largest multidisciplinary conference covering issues of aging and quality of life for older adults.

Three members of DACL's Aging and Disability Resource Center attended the State Health Insurance Conference in July 2019 in San Diego, CA hosted by the Senior Medicaid Patrol to help educate them on how to assist Medicare-eligible individuals, their families, and caregivers on how to make informed health insurance decisions that optimize access to care and benefits.

One member of the ADRC attended the Centers for Medicaid and Medicare Services Training - State Health Insurance Program in July 2019 to be nationally trained on Medicare and Medicaid, and the Federally-facilitated Health Insurance Marketplace.

DACL's IT Specialist went to CareForum 2019 in Kansas City, MO in August 2019. CareForum 2019 was a conference for WellSky (formerly Mediware) users and the wider community of professionals in acute and post-acute health care and human services. The conference helped the agency understand up and coming improvements to its current case management system.



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Three members of DACL's Aging and Disability Resource Center (ADRC) joined the Aging and Disability I&R/A professionals at the 41th Annual Alliance of Information and Referral Assistance (AIRS) I&R Training and Education Conference held in Dallas, Texas, which featured national, state and local professionals from across the country discussing initiatives and innovations in aging and disability I&R/A programs and offered a training opportunity to become AIRS certified.

DACL also had five members of the ADRC attend the National Association of States United for Aging and Disabilities HCBS Conference, which is hosted annually in DC which is centered around improving state systems that deliver long-term services and supports (LTSS) for all ages and abilities.

DACL's nutritionist attended the Food and Nutrition Conference and Expo (FNCE) held in Washington, DC in October 2018. The annual meeting hosted by the Academy of Nutrition and Dietetics allows more than 10,000 registered dietitian nutritionists, nutrition science researchers, policy makers, health-care providers and industry leaders to address key nutrition issues and trends. The conference provided 18 CEUs from presentations ranging from "The Multicultural Healthy Diet for Cognition," "Muscle, Protein, Exercise and Healthy Aging," and "The Science of Modified Carbohydrate Diets and Application in the Clinic."

DACL's Director and Director of Communication attended the Cooper Service Design Immersive held in Brooklyn, New York in March 2019. Through this training, attendees learned how to use the design thinking process to address various problems in customer service.

Twelve staff members of DACL's Programs unit held an in-house training by Management Concepts in August and September 2019 about "Evaluating Financial Capabilities" and "Prioritizing and Conducting Grant Monitoring."

In addition, DACL provided additional training and continuing education opportunities for its social work staff in FY19 with the following topics:

- 11 staff members took two trainings hosted by Dr. Gillian Berry "Taking our work to the next level: Social Work Practice that makes 'real' difference" and "A Leopard Can Change its Spots: Motivational Interviewing with an aging population."
- 10 staff members took a training titled "Social Work Training Race, Culture, and Ethical Implications in Social Work Practice" trained by Dr. Vivian Jackson.
- 12 staff attended a training on "Clinical Features in Working with Seniors with Mental Health Concerns" trained by Emily Dickerson and Patricia Martin-O'Meally, Stephanie Clark Dr. Tahira Lodhi, Tyreese McAllister, and Toya Fisher.
- 4 staff attended "Person-Centered Training" done in-house at DACL by trainers Linda Irizarry, Shawn Terrell, and Lourdine Jean-Francois.
- 8 staff attended a training on "We Work; Working as We Grieve" trainers were Makia Burgess and Jasmine Blue.

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- 7 staff members attended a training on “Advance Directives & Advance Care Planning for Health Care Providers” by trainer Makia Burgess.

36. Does the agency conduct annual performance evaluations of all its employees? Who conducts such evaluations? What steps are taken to ensure that all agency employees are meeting individual job requirements?

Yes. DACL conducts an annual performance evaluation of all its employees. Each manager conducts performance evaluations for each member of his/her team to ensure that each employee is meeting job requirements. Performance evaluations are reviewed before they are finalized to ensure consistency throughout the agency. The last performance evaluation was conducted at the end of FY19, per DCHR’s annual requirement. Managers also hold mid-year performance conversations with each employee, as well as regular 1:1 meetings with each team member throughout the year.

### Agency-specific Questions

37. Please list each new policy initiative of the agency during FY19 and FY20 to date. For each initiative please provide:
- a. A detailed description of the program;
  - b. The name of the employee who is responsible for the program;
  - c. The total number of FTEs assigned to the program;
  - d. The amount of funding budgeted to the program.

#### **Integration of Adult Protective Services (APS) from DHS to DACL**

**Description:** In FY20, DACL assumed the operations of APS and is working to fully integrate the functions of Adult Protective Services (APS) with DACL’s larger direct services delivery system. With the addition of APS, DACL is working on a successful transition and create a responsive, integrated, and adaptive social work team. The integration is allowing clients who come into contact with APS to be better connected to services from initial crisis, to stabilization, and continuing support in the community.

**Employees responsible:** Please see response to Q2 – Schedule A.

**Number of FTEs:** 24

#### **SAH Cost-Share Program Component**

**Description:** In FY19, DACL continued the operations of the Safe at Home Program and added a new cost-sharing component to accommodate residents who make up to 100% of the Area Median Income (AMI). The goal is to allow more older residents who are middle-income to access SAH services in order continue living in their homes and communities. DACL brought in a new grantee, Rebuilding Together, to operate the cost-share component.

**Employees responsible:** Rinaldo Washington

**Number of FTEs:** 1

#### **Senior MedExpress Program Launch and Transfer to DFHV**

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**Description:** In FY19, DACL launched the Senior MedExpress (SME) Program, which provides essential medication transportation service provides non-emergency, life-sustaining medical transportation services for qualified seniors. Senior MedExpress is operated by the Yellow Cab Company and is grant-funded by DACL. Transportation is available to and from medically essential and necessary services or benefits appointments, Monday through Friday, 6am – 6pm. This program provides transportation for clients whose medical needs may prevent them from using other available transportation. In order to help streamline and better coordinate transportation options for seniors, DACL has transferred SME to the Department of For-Hire Vehicles (DFHV) in FY20 through a Memorandum of Understanding (MOU) with a permanent transfer in FY21.

**Employees responsible:** Asha Hamilton

**Number of FTEs:** 1

### Launch of Wards 2 & 3 Satellite Wellness Program

**Description:** In FY19, DACL created more opportunities for older residents to access services and wellness activities in Wards 2 & 3 where no brick and mortar Senior Wellness Centers (SWCs) exist by implementing a Satellite Wellness Pilot Program in these wards. The pilot has increased the number of fitness and wellness activities across both Wards and served 300 new seniors who were not part of any DACL service.

**Employees responsible:** Jennifer Adu

**Number of FTEs:** 1

### 10-Year Senior Strategic Plan

**Description:** In FY20, DACL will work on the development of a 10-year comprehensive strategic plan that will serve as a long-term planning tool for District services for older adults. Per legislation, the plan requires consultation with seniors and community partners. DACL will work to include a diverse group of stakeholders in the development of the plan.

**Employees responsible:** DACL is in the process of hiring personnel.

**Number of FTEs:** 3

### New Ward 8 Adult Day Program

**Description:** Iona Senior Services received the competitive grant for DACL's Adult Day Care Center, which was previously operated by another grantee at 926 11th Street, NW. Iona plans on opening a new site in Congress Heights (scheduled to open April 2020) that will provide a full range of geriatric day care services. The service scope for this RFA includes providing: 1) therapeutic services to functionally-impaired District residents 60 years and older, in order to avoid or forestall institutionalization; 2) respite for family members and caregivers, engaging them in prevention health and education activities; 3) specialized services to easily access resources and support services needed to effectively navigate long-term care options to remain independent and connected to the community and; 4) resource information on services and supports, e.g., Elderly and Persons with Disabilities (EPD) Waiver, that prevent institutionalization when they are no longer able to function in the day care setting.

**Employees responsible:** Jennifer Adu

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**Number of FTEs:** 1

### **Partnership with Howard University College of Pharmacy on Medicare Counseling**

**Description:** In FY20, DACL's State Health Insurance Counseling Program (SHIP) is partnering with Howard University College of Pharmacy to develop and implement a training program for DC pharmacists that would provide additional information and support regarding Medicare benefits for seniors. SHIP staff, in conjunction with HU College of Pharmacy staff and students, has developed a Medicare webinar specifically targeted to DC Pharmacists and pharmacy technicians, which provides an overview of the Medicare program. Providers will be able to receive continuing education credits for their participation in the program. Additionally, the partnership will involve identifying and engaging Howard University College of Pharmacy students to disseminate pharmacy information/referral kits and participate in outreach events.

**Employees responsible:** Cheryl Smith

**Number of FTEs:** 1

### **Partnership with UDC on SAH Program Evaluation**

**Description:** In FY20, DACL is working with the University of the District of Columbia (UDC) to collect and analyze data to evaluate the impact of the Safe at Home (SAH) Program in reducing falls or falls-risks for those who have received SAH services. During FY20, UDC and DACL are working with grantees and participants to implement a research methodology and perform preliminary statistical data analysis that can be utilized to improve program operations in FY21.

**Employees responsible:** Asha Hamilton

**Number of FTEs:** 1

### **New Virtual Reality Program Component to Adult Day Programs**

**Description:** In FY20, DACL is partnering with Iona and Viva Vita to implement a virtual reality component to our Adult Day Programs. This initiative will bring virtual reality to seniors with cognitive decline issues and engage them in experiences that promote brain health and community fellowship in a convenient setting. Viva Vita's trained team is coming directly to the sites with everything needed for immersive and engaging virtual reality sessions.

**Employees responsible:** 1

**Number of FTEs:** Jennifer Adu

38. Please describe any initiatives the agency implemented within FY19 and FY20 to date, to improve the internal operation of the agency, reduce waste, fraud and abuse, or the interaction of the agency with outside parties. Please describe the results, or expected results, of each initiative.

### **Agency Wide Community Outreach**

In FY 2019, the agency required all DACL staff at all levels to complete four hours of community outreach every quarter, which has increased the agency's ability to participate in and host regular Senior Health and Wellness Fairs at places of worship, senior apartments,

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recreation sites, hospitals, and the DC Jail. Other benefits of this program include more visibility for DACL, greater interaction with DACL's target audience, and improved employee morale. As a result, DACL completed 209 community outreach events in FY19.

### **Brand Training**

The agency successfully rolled out the new logo, tagline, and branding for the agency and required all staff and network grantees to participate in a 1-hour training. The training was designed to provide guidance on the proper usage of the agency logo and tagline and to ensure that agency staff and the grantee network had the resources and tools to appropriately represent the agency brand in public. Ongoing training will help enable the agency to maintain the integrity and consistency of the DACL brand across all programs and services.

### **Implementation of a New Invoicing Template for Grantees**

In FY19, DACL successfully rolled out a standard automated invoicing template ("M-1") that all grant recipients use when submitting their monthly invoices for reimbursement by DACL. The template provides the agency with increased transparency into how program costs are allocated across cost categories and services. As a result, the invoicing template has improved the quality of monitoring across grant programs and improved programmatic and financial dialogue between the agency and grant recipients. The enhanced M-1 was piloted with grantees before its implementation and feedback and comments were incorporated in order to make it a useful tool for grantees as well to track their grant expenditures, including burn rates.

### **Revision of Senior Service Network (SSN) Service Standards**

In FY20, DACL worked collaboratively with the SSN grantees to revise and improve service standards for: comprehensive assessment, case management, and counseling service standards. Additionally, the agency updated its comprehensive assessment tool to improve the intake process, identify needs quicker, and minimize burdensome and unnecessary questioning. DACL created a Taskforce composed of SSN grantees to ensure collaboration on this effort. With the revision of our service standards, DACL's goal is to improve quality of service, better coordination of care for clients, and to bring these into best clinical practice. The revised standards will be effective on February 1, 2020. DACL plans to continue revising its service standards across other services in FY20.

### **Documentation**

In FY20, DACL introduced a standardized format for clinical documentation to ensure that assessments, case management and referrals are made in a timely and efficient manner to provide high quality services to clients. This format will be used across all social work teams in DACL and will be expanded to the senior network throughout this year.

### **Formalization of Internal Procedures**

In FY19 and FY20, the agency continued to review and adapt its business processes and policies for all teams, as needed. This includes reviewing and standardizing financial

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processes, grant monitoring, and internal procedures for each team within the Social Services Division.

39. Please explain the impact on the agency of any legislation passed at the federal level during FY19 and FY20 to date.

The agency is not aware of any legislation passed at the federal level during FY19 and FY20 to date that impacts DACL's ability to provide programs and services.

40. Please describe the effects on the capacity of the agency due to federal budget cuts.

DACL has not experienced any federal budget cuts in FY19 or FY20 to date.

41. Please describe any preparations by the agency in anticipation of policy and priority changes under the federal administration.

DACL does not expect any policy or priority changes to impact DACL's federal funding for senior services.

One key priority change DACL expects is the roll out of ACL's Title III's New State Performance Report/Older Americans Act Performance System (SPR/OAAPS). The system will be used to enter required data on federal grants and services provided by DACL to District seniors. To prepare for the change, DACL has participated in webinars to receive information on the new exploratory testing site as well as resources, including technical documents, training resources, and technical assistance that will be available to Title III users for support. In addition, DACL has been invited to a small cohort to pilot test the system. The nationwide launch of SPR/OAAPS is expected to be October 2021.

42. Please describe the agency's efforts to utilize federal grants and other alternative funding sources.

DACL continuously explores the use of different funding sources to improve and expand its service areas. DACL closely reviews all funding source requirements to ensure compliance and that funds are appropriately allocated to address the needs of targeted populations. Some key efforts include:

- Medicaid Administrative Claiming, which allows the agency to claim federal Medicaid reimbursement for activities related to the administration of the District's Medicaid plan.
- Applying for federal grants to use more federal funding for services to District seniors. Most recently, DACL was awarded a multi-year Alzheimer's Dementia Support Services Program grant by the U.S. Administration on Community Living (ACL).
- Leveraging any unspent federal dollars by seeking no-cost extensions that allow the agency to use federal funds to expand a service or create a new innovative way to spend the funds. For example, in FY20, State Health Insurance Council federal rollover dollars have been used to create a new Pharmacy Outreach Initiative with Howard University to: 1) advertise opportunities to disseminate pharmacy outreach

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and referral kits to pharmacies that could benefit from receiving information about a) Low-income Subsidy/Limited Income Net Program (LIS/LINET) and Qualified Medicare Beneficiary (QMB), and b) how to make referrals to DC SHIP. Representatives from the College of Pharmacy are partnering with DC SHIP to clarify scheduled outreach opportunities that students can participate in; and 2) recruit potential volunteers to serve as SHIP volunteers specifically for outreach events, assisting with Medicare Part D Open Enrollment, and disseminating pharmacy outreach and referral kits. Representatives from the College of Pharmacy will assist with identifying students for the roles indicated above. This initiative will allow more seniors to know about their Medicare options.

- In previous years, DACL has also assisted grantees in becoming Medicaid-providers to leverage more Medicaid dollars.

43. What steps, if any, has the agency taken during FY19 and FY20 to date, to reduce the following:

- a. Space utilization
- b. Communications costs
- c. Energy use
- d. Criminal activity in and around developments

DACL continues to look for innovative ways to reduce space utilization, communication costs, energy use, and criminal activity in and around developments. In FY19, the agency has taken steps to repurpose rooms and build out additional cubicles within its HQ to help accommodate staff capacity without infringing upon senior programmatic space at the Hayes Senior Wellness Center. This build out project will be completed in FY20.

All managers do a regular review of communications equipment assigned to their teams to ensure that DACL only pays necessary communications costs. In addition, the agency supplied senior wellness centers with recycling bins to reduce waste and save energy. DACL also has continued to forge a strong partnership with the Department of General Services Protective Services Division and General Counsel's office to ensure our facilities are safe and secure.

44. What District legislation has yet to be implemented by the agency, if any? If legislation has not yet been implemented, please explain why.

In FY19, B22-686 Senior Strategic Plan Amendment Act of 2018 was signed into law, subject to appropriations, requiring DACL to lead the development of a comprehensive strategic plan that will serve as a long-term planning tool for District services for older adults. As part of this process, DACL will partner with sister agencies to evaluate the needs of older District residents, including needs pertaining to housing, transportation, employment, and the prevention of elder abuse and fraud.

The Council funded this legislation in FY20. DACL is currently hiring three FTEs—a Supervisory Data Management Analyst, a Data Management Analyst, and a Performance Analyst. In FY 20, DACL will begin engaging the community through surveys, in-depth

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interviews, and focus groups to evaluate needs in the District. Per the legislation, the 10-Year Strategic Plan will focus on the District's changing demographics, current needs of District seniors, an evaluation of current services provided by DACL and the grantee network, analysis of national best practices, and recommendations.

45. How does the agency plan on executing a coordinated outreach plan regarding the District legislation to change the name from the District of Columbia Office on Aging to the Department on Aging and Community Living?

In FY 2019, DACL worked with a consultant to create a new logo, brand, and visual identity to reflect the name change to the Department of Aging and Community Living. DACL worked with internal and external stakeholders to develop the logo and new tagline and seniors from all eight wards selected the final logo through a voting process. DACL continues to socialize the new brand, but has already accomplished the following:

- Rebranded all DACL-owned vehicles, including Seabury-operated buses, vans, meal-delivery trucks, and SUVs, creating more visibility in neighborhoods across the city
- Redesigned all newsletters, flyers, brochures, pamphlets, stationary, and business cards.
- Launched a Live Boldly Social Media campaign
- Conducted promotional outreach events at Senior Wellness Centers and 40 Community Dining Sites
- Executed an internal launch of the brand for all DACL staff, which included comprehensive training on the brand, background, DACL's new mission, vision, and logo usage and guidance
- Held a network launch of the brand for all network grantees which included comprehensive training on the brand, background, DACL's new mission, vision, and logo usage and guidance
- Promoted the new brand in the community newspapers such as the Senior Beacon and The Informer
- Promoted the new brand on the SeniorZone, 1340AM
- Sent letters to clients to increase awareness of the name change
- Continued promotion of the brand at the Mayor's Annual Senior Holiday Celebration with more than 3,000 participants

In FY2020, DACL will continue to socialize the new brand in the community through continued distribution of promotional items, continued participation in community outreach events, and securing earned media around major events including, but not limited to, Cupids Kids, Older Americans Month events, Mayor's Annual Senior Symposium, Ms. Senior DC, Capital Pride. DACL is also in the process of rebuilding its website to make it more user-friendly and reflective of the new brand.

46. What has the agency done in FY19 and FY20 to date to make the activities of the agency more transparent to the public? In addition, please identify ways in which the activities of the agency and information retained by the agency could be made more transparent.

Each fiscal year, DACL engages the community on activities of the agency through the following forums:



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- **Outreach** - The agency wide community outreach initiative provides an opportunity for staff at all levels to spend more time engaging directly with older residents in the community, provide updates on programs and services and hear feedback from more residents in more neighborhoods. In FY19, the agency participated in 208 outreach events, covering all eight wards of the city. Agency staff receive annual training on effective community outreach and communications.
- **Senior Wellness Center (SWC) Town Halls**- Each year DACL requires all Senior Wellness Centers providers to hold budget meetings with participants to review the current programming, discuss priorities, and reach understanding on any programmatic changes for the current or next fiscal year.
- **DACL Town Halls** - The DACL Director conducts town halls at senior wellness centers and other community centers across the city on a regular basis to provide agency updates, budget presentations, and an opportunity for the public to provide feedback. In FY 19, the agency held 13 town hall meetings and two citywide telephone town halls in partnership with DMHHS and AARP. In addition, the agency director visited 39 community dining sites to chat with participants directly. DACL leadership also partnered with DGS to hold seven community town halls to discuss capital expansions at two Senior Wellness Centers and refreshers at six senior wellness centers.
- **Mayor's Telephone Town Hall** - The Mayor hosts every year a telephone town hall with seniors across the city to hear directly from them about their issues and priorities ahead of the next fiscal year's budget.
- **Additional Community Forums** - DACL also holds community forums and participates in community meetings as requested. DACL regularly participates in Commission on Aging meetings, as well as other meetings on request such as with the Senior Advisory Coalition, the Citizens Advisory Group, Seniors Speaking Out and Up and various task forces and ANCs across the city. In addition, DACL continued its regular meetings with the LGBTQ Advisory Committee to provide updates on the progress of developing LGBTQ programs.
- **Reporting** - DACL reports on its operations on a regular basis. DACL submits quarterly reports to the Council; the Aging and Disability Resource Center (ADRC) develops bi-weekly and quarterly reports to measure the successes of the Elderly and People with Physical Disabilities (EPD) Waiver and the Adult Day Health Programs (ADHP); and DACL provides quarterly Olmstead reports.
- **DACL Website** - DACL updates the agency website regularly and on an as needed basis to ensure that current forms and information are available in a timely manner. In FY20 DACL began working with OCTO to build a new site, to reflect the updated name of the agency; include better organization of programs and services and implement more user-friendly navigation. DACL is currently in the process of moving information from the old dcoa.dc.gov site over to the new dacl.dc.gov site, while updating the information and ensuring that content is easily accessible to target audiences. DACL will also be using the new site to post results of surveys and studies that will be a part of the Senior Strategic Plan and provide an update of the progress of the plan. DACL will also share grant and budget information to keep the public aware of the agency's investments in seniors and services.
- **Senior Service Network Grantees** – DACL meets with the grantee network on a regular basis to provide agency updates and trainings. In addition, information on

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programs and events are circulated to the network to be passed on to their participants.

In FY 20, DACL will continue to work on ensuring residents know the services, activities, and programs available from DACL and its Senior Service Network. We will continue to work with grantees to ensure that information is consistently shared with the community.

47. How often does the agency make updates to the public website regarding statistical information, services, forms, etc.?

DACL updates the agency website regularly and on an as needed basis to ensure that current forms and information are available in a timely manner. In FY20 DACL began working with OCTO to build a new site, to reflect the updated name of the agency; include better organization of programs and services, and implement more user-friendly navigation. DACL is currently in the process of moving information from the old dcoa.dc.gov site over to the new dacl.dc.gov site, while updating the information and ensuring that content is easily accessible to target audiences.

DACL will also be using the new site to post results of surveys and studies that will be a part of the Senior Strategic Plan and provide an update of the progress of the plan.

48. Please discuss whether the agency has conducted or plan to survey the senior community to obtain health profiles of the residents. If so, please describe the agency's plan in detail.

With the funding of B22-686 Senior Strategic Plan Amendment Act of 2018, DACL will lead to the development of a comprehensive strategic plan that will serve as a long-term planning tool for District services for older adults. As part of this process, DACL will partner with sister agencies to evaluate the needs of older District residents, including needs pertaining to housing, transportation, employment, and the prevention of elder abuse and fraud. DACL is currently hiring three FTEs—a Supervisory Data Management Analyst, a Data Management Analyst, and a Performance Evaluator—to lead this effort.

In FY 20 DACL will begin engaging the community through surveys, in-depth interviews, and focus groups to evaluate needs in the District. Per legislation, the 10-Year Strategic Plan will focus on changing demographics in the District, current needs of District seniors, an evaluation of current services provided by DACL and the grantee network, analysis of national best practices, and recommendations. The plan will be updated every two years.

49. Is there a regular or routine cycle of information dissemination from the office to the senior population? If so, how is it accomplished?

DACL continues to use various media to promote programs and services, including: publishing its monthly newsletter in the *Senior Beacon*, *The Informer*, and, until printing ceased in March 2019, *The Current Newspapers*; a quarterly radio address from the director on the SeniorZone (1340am); and a monthly electronic newsletter which is circulated to more than 2,600 residents.

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Additionally, all staff at the agency are required to participate in at least four hours of Community Outreach each quarter, which increased the agency's ability to participate in and host regular Senior Health and Wellness Fairs at places of worship, senior apartments, recreation sites, hospitals, the DC Jail, and federal prisons.

In FY19, DACL significantly increased its social media presence on Facebook, Instagram, and Twitter, resulting in an increase in followers at 40 percent, 21 percent, and 7 percent, respectively. The increased multimedia presence has enabled the agency to promote services, activities, and programs on a daily basis. In FY19, DACL participated in or hosted 208 community outreach covering all eight wards of the city.

In FY19, DACL changed its name and underwent a complete agency rebranding, which included increased outreach events at all DACL sites, rebranding of all agency vehicles, redesign of agency printed materials, and increased social media presence. In the first quarter of FY 20, DACL has already completed 54 outreach events, including promotional events to introduce the new brands at all Senior Wellness Centers and 40 community dining sites.

50. Please describe the type(s) of outreach efforts currently in place to communicate the agency's services to the community.

Please see response to Q45 and Q49.

51. Please detail the Commission's efforts in FY20 for outreach and engagement with seniors in the District.

The Commission is working to formalize their efforts in FY20 for outreach and engagement with seniors in the District. In past years, the Commissioners have attended neighborhood meetings, wellness centers, and other locations/events hosted throughout the District to engage with seniors. Commissioners would then share any information collected with the Commission as a whole. If commissioners heard any concerns, they would share the concerns with DACL staff and/or the Commission's Ex-Officio members.

52. Please describe how the agency solicits feedback from customers.
- What has the agency learned from this feedback?
  - How has the agency changed its practices as a result of this feedback?

DACL continuously seeks opportunities to engage with seniors, and the community, and solicits feedback through:

- **Annual Surveys:** Providers in DACL's Senior Service Network assess customer satisfaction on an annual basis via survey evaluations, which are included in their annual reports to DACL.
- **Senior Wellness Centers:** Senior Wellness Centers are required to hold open budget meetings to solicit feedback on program offerings from participants of the wellness center and make changes based on the feedback. This is required by all senior wellness center grantees before budgets are given final approval by DACL.

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- **Town Halls:** The DACL Director conducts town halls at senior wellness centers and other community centers across the city on a regular basis to provide Agency updates, budget presentations, and an opportunity for the public to provide feedback. In FY 19, the agency held 13 town hall meetings and two citywide Senior Town Talks via Facebook live in partnership with DMHHS and AARP. In addition, the Director visited 39 community dining sites to chat with participants directly. DACL leadership also partnered with DGS to hold seven community town halls to discuss capital expansions at two Senior Wellness Centers and refreshers at six senior wellness centers.
- **Agency Wide Community Outreach:** The agency wide community outreach initiative provides an opportunity for staff at all levels to spend more time engaging directly with older residents in the community and hear feedback from more residents in more neighborhoods. In FY19, the agency participated in 208 outreach events, covering all eight wards of the city. Agency staff receive annual training on effective community outreach.
- **Phone/Email:** The Information & Referral/Assistance phone number, “Ask the Director” email, and “Ask ADRC” email are widely circulated in print and online media, the agency website and social media accounts, and provided at all in-person outreach events.
- **Social Media:** DACL’s social media accounts are regularly monitored for comments and tags. In FY19, social media engagement increased significantly across all platforms.

Through these feedback processes, DACL has identified several recurring themes from the community this past year:

- The community wanted a new brand that reflects a greater diversity of seniors and adults with disabilities, evoking a sense of inclusivity and belonging
- Many customers accessing senior programs, activities, and services were not aware that they were funded by DACL
- The community wanted to see more outreach to underserved populations
- The community wanted more opportunities to engage with their community and with DACL

As a result of the feedback, DACL has done the following:

- **Including the community in the rebranding process:** In FY19, DACL worked with a consultant to create a new logo, brand, and visual identity to reflect the name change to the Department of Aging and Community Living. DACL worked with internal and external stakeholders to develop the logo and new tagline. The final logo was chosen from a voting process where participants in programs from across the grantee network, representing all eight wards, chose their favorite logo and tagline to represent DACL. DACL’s current logo was designed based on feedback from the community and was chosen by the community to represent the agency.
- **Increased brand consistency across programs:** As part of the rebranding process, DACL held a training for all grantees to provide guidance on brand usage in their individual marketing materials to ensure more consistency and visibility of the agency across all funded programs. In FY19, DACL rebranded all agency vehicles, including

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Seabury-operated buses, meal-delivery trucks, vans, and SUVs with the new logo to increase visibility of the agency in neighborhoods across the city.

- **Used community feedback to drive the creation of DACL programs:** DACL heard from the community that more needed to be done to serve seniors who identify as LGBTQ. In early FY19, DACL continued to engage with the LGBTQ Advisory Committee, formed in FY18 and made up of District residents, service providers, government representatives, older LGBTQ adults, and community advocates. In FY19, recommendations from the committee formed the basis of DACL's LGBTQ pilot programs and the creation of the first RFA specifically for LGBTQ senior programming. DACL awarded grants to five organizations to deliver programming that aligned with the advisory committee recommendations and in FY20, D.C. became one of only a handful of cities to deliver programs specifically for LGBTQ older adults, which include peer-led support groups, social activities, conversation and entertainment around a meal, intergenerational mentoring, and special events.
- **Reached new populations with continued agency-wide outreach:** DACL continues to require all staff, regardless of role, to engage in four hours of community outreach on a quarterly basis. Thanks to this effort, the agency continues to host or participate in more than 200 outreach events annually. In FY19, DACL continued to focus on new underserved populations who were not previously connected to DACL programs. This included older adults currently experiencing homelessness. DACL held two Community Health and Wellness fairs at Central Union Mission and one at New Endeavors for Women, where participants were able to engage with several service providers, receive free health screenings, including dental, vision, blood pressure, and hearing and speech pathology. Thanks to these efforts, in FY20 DACL was invited back to deliver health and wellness fairs on a monthly basis at Central Union Mission, helping to connect older adults experiencing homelessness with vital health screenings and programs. In addition, DACL partnered with the Mayor's Office on Returning Citizens Affairs to reach out to older District residents currently incarcerated in out-of-state federal prisons. This engagement has enabled DACL to engage with hard-to-reach aging populations and provide information to programs and services to help ensure their transition back into their communities are successful. In FY19, DACL presented to 303 District residents and soon-to-be returning citizens residing in federal prisons in West Virginia, Maryland, and New Jersey.

53. Which programs at the agency are in most need of funding?

All DACL programs are adequately funded.

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

Please see response to Q46.

55. Please explain the impact on the agency of any legislation passed at the federal level during the last year. Specify such legislation and relevant provisions if possible.

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Please see response to Q39.

56. Please identify any statutory or regulatory impediments to the agency's operations.

DACL does not currently have any statutory or regulatory impediments to the agency's operations.

57. Please provide a copy of the agency's FY20 **performance accountability report**.

- a. Please explain which performance plan strategic objectives and key performance indicators (KPIs) were met or completed in FY20 and which were not.
- b. For any met or completed objective, also note whether they were completed by the project completion date of the objective and/or KPI and within budget. If they were not on time or within budget, please provide an explanation.
- c. For any objective not met or completed, please provide an explanation.

There is no FY20 performance accountability report yet. The report is done after the fiscal year concludes. However, please see Attachment Q24 - DACL FY19 Performance Accountability Report for FY19's report.

58. Please provide a copy of your agency's FY20 **performance plan** as submitted to the Office of the City Administrator. Please discuss any changes to outcomes measurements in FY19 or FY20, including the outcomes to be measured, or changes to the targets or goals of outcomes; list each specifically and explain why it was dropped, added, or changed.

Please see responses to Q24; Q25 and Attachment Q25 - DACL FY20 Performance Plan.

In FY20, DACL's performance plan includes the following changes:

- New core business measures which are now standard to all District government agencies' performance plans. The goal of these measures is to create and maintain a highly efficient, transparent, and responsive District government. Many of these have new targets or are under a data collection phase as indicated in Attachment Q25.
- New Adult Protective Services (APS) measures. These were added to reflect the transfer of APS from DHS to DACL, and include:
  - KPI: Percent of referrals in non-emergency cases where initial client contact and investigation takes place within ten working days by APS.
  - KPI: Percent of Emergencies Responded to Within 24 Hours by APS.
  - Workload Measure: Number of referrals received in APS.
  - Workload Measure: Number of court Appointed Guardians/Conservators
  - Workload Measure: Number of cases investigated in APS

59. What are your top five priorities for the agency? Please provide a detailed explanation for how the agency expects to achieve or work toward these priorities in FY20.

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**Reimagining the front door experience** – DACL continues to focus on creating a more seamless customer experience when accessing programs, services, and supports. In FY20 DACL will continue efforts towards strengthening our programs, quality of services, and streamlining access to all services and supports across the aging network. Adult Protective Services (APS) is being combined with the agency’s larger direct services delivery system to create a responsive, integrated, and adaptive social work team. This integration will allow clients who come into contact with APS to be better connected to services from initial crisis, to stabilization, and continuing support in the community. To accomplish this, DACL will also continue work with our grantee network to ensure consistency in service and a strong continuum of services both within the agency and throughout the aging network.

**Combatting Social Isolation** – Combatting social isolation continues to be a top priority for the agency. To strengthen DACL’s ability to identify and serve isolated and home-bound seniors, DACL must rely on the community itself. In FY20 we will continue to focus on strengthening volunteer models to reach more seniors, by encouraging neighbor-to-neighbor connections through regular check-in calls, home visits, and neighborhood social events and gatherings. This includes continued support for senior villages, senior peer support and companion programs, and LGBTQ engagement and programming. In addition, DACL will continue with its community outreach efforts and monthly Ambassador trainings to ensure that more District residents are mobilized to assist the agency in identifying potential socially isolated seniors. DACL will also continue to facilitate intergenerational connections through initiatives like Cupids Kids, LGBTQ intergenerational mentoring programs, and more partnerships with local schools.

**Senior Strategic Plan** – Per B22-686 Senior Strategic Plan Amendment Act of 2018, DACL will lead the development of a comprehensive strategic plan that will serve as a long-term planning tool for District services for older adults. As part of this process, DACL will partner with sister agencies to evaluate the needs of older District residents, including needs pertaining to housing, transportation, employment, and the prevention of elder abuse and fraud. DACL is currently hiring three FTEs—a Supervisory Data Management Analyst, a Data Management Analyst, and a Performance Evaluator—to lead this effort. In FY20, DACL will begin engaging the community through surveys, in-depth interviews, and focus groups to evaluate needs in the District. Per legislation, the 10-Year Strategic Plan will focus on changing demographics in the District, current needs of District seniors, an evaluation of current services provided by DACL and the grantee network, analysis of national best practices, and recommendations. Once the Plan has been completed, it will be updated every two years.

**Supporting a learning environment** – As the agency continues to grow, DACL is focused on cultivating a culture of learning and professional development within the agency and across the network. In FY20, DACL will continue to promote learning opportunities and professional development at all levels, both agency wide, and in areas that are specific to individual roles, and short-term, and long-term goals. DACL continues to require all staff to participate in community outreach on a quarterly basis and support the agency in major community events. In addition, DACL will continue to create opportunities for all staff to engage in program and system designs.

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**Increase Visibility of DACL** – DACL continues to socialize its new name and brand in the community in FY20, which has included increased community outreach at 208 total events completed in FY19 and increased promotion and brand visibility, including rebranding all agency vehicles. This year, with the addition of a Deputy Director of Communications, the agency will focus on more earned media opportunities, increased outreach through mailings, and advertising, and a more robust multimedia presence to include videos, social media, and electronic newsletters, in addition to its print newsletters, and quarterly radio spots. DACL also continues to work with the network to ensure brand consistency across all programs and services.

60. What are five goals that DACL achieved in FY19?

**Rebranding** – In FY 19, the agency was officially designated as the Department of Aging and Community Living (DACL) and the agency successfully created and launched a new logo, brand, and visual identity for the first time since the agency was established in 1976. Seniors from all eight wards provided input on the design of the new logo through in-depth stakeholder interviews and by selecting the final logo through a voting process. In addition, the Agency rebranded all vehicles, including buses, vans, and meal-delivery vehicles to increase brand visibility throughout the city. As part of its citywide communications and outreach strategy, DACL staff held promotional events in all eight wards at Senior Wellness Centers and community dining sites to promote the new brand, mission, and vision of the agency. DACL will continue these efforts in FY20.

**LGBTQ programs** – In FY19 DACL issued the first-ever request for applications (RFA) for LGBTQ-specific programming for older adults, allowing LGBTQ organizations and others to apply for funding and propose innovative programming to address the needs of seniors who identify as LGBTQ. Through the competitive grant process DACL selected five organizations, Seabury, Capitol Hill Village, TERRIFIC, Inc., Iona, and for the first time, the LGBTQ organization, DC Center. In FY20, DACL officially launched the programs which included peer-led support groups, wellness activities and programs around a meal, intergenerational mentoring, and social and educational opportunities and outings.

**Reached more seniors through Satellite Wellness Pilot** – In FY19, DACL officially launched the Around Town satellite wellness pilot program in Wards 2 and 3, using community spaces to deliver the same high-quality programs found in Senior Wellness Centers, and connecting residents to programming that currently exists in wards without a brick-and-mortar senior wellness center. In FY19, the program served 444 unduplicated clients, of which, 365 were interacting with DACL for the first time.

**Safe At Home highest number of record completions in any given year** – In FY19, Safe at Home completed the highest number of projects in any given year since its launch in 2016 at 1,162 in-home adaptations and 676 security camera installations. Since this program launched in 2016, we've made more than 3,000 homes safer through in-home adaptations like grab bars, stair lifts, tub cuts, and furniture risers. And through the installation of 1,400 exterior security cameras.



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**Improved technical and budgetary assistance to the grantee network** – In FY19, DACL developed an advanced payment policy to address concerns regarding various financial burdens at grantee organizations. All DACL-funded grantees may now request an advance payment of the executed grant award amount up to 25% of the approved budget. The goal of this policy is to support grantees in maintaining the capacity needed to operate DACL-funded programs. This policy ensures grantees are better able to spend the full amount of their funding by the end of the fiscal year and create more consistency in the services provision. DACL has received positive feedback from grantees that this policy has helped them continue to deliver high quality services. In addition, DACL has made significant improvements to its grants processes. After a successful pilot period with select grantees, DACL successfully rolled out a standard automated invoicing template (“M-1”) that all grant recipients use when submitting their monthly invoices for reimbursement by DACL. The template provides the agency and grantees with increased transparency into how program costs are allocated across cost categories and services. As a result, the invoicing template has improved the quality of monitoring across grant programs and improved programmatic and financial dialogue between the agency and grant recipients.

61. What are five areas that DACL hopes to improve upon in FY20?

**Reimagining the front door experience** – DACL continues to focus on creating a more seamless customer experience when accessing programs, services, and supports. In FY20 DACL will continue efforts towards strengthening our programs, quality of services, and streamlining access to all services and supports across the aging network. Adult Protective Services (APS) is being combined with the agency’s larger direct services delivery system to create a responsive, integrated, and adaptive social work team. This integration will allow clients who come into contact with APS to be better connected to services from initial crisis, to stabilization, and continuing support in the community. To accomplish this, DACL will also continue work with our grantee network to ensure consistency in service and a strong continuum of services both within the agency and throughout the aging network.

**Combatting Social Isolation** – Combatting social isolation continues to be a top priority for the agency. To strengthen DACL’s ability to identify and serve isolated and home-bound seniors, DACL must rely on the community itself. In FY20 we will continue to focus on strengthening volunteer models to reach more seniors, by encouraging neighbor-to-neighbor connections through regular check-in calls, home visits, and neighborhood social events and gatherings. This includes continued support for senior villages, senior peer support and companion programs, and LGBTQ engagement and programming. In addition, DACL will continue with its community outreach efforts and Ambassador trainings to ensure that more District residents are mobilized to assist the agency in identifying potentially socially isolated seniors. DACL will also continue to facilitate intergenerational connections through initiatives like Cupids Kids, LGBTQ intergenerational mentoring programs, and more partnerships with local schools.

**Supporting a learning environment** – As the agency continues to grow, DACL is focused on cultivating a culture of learning and professional development within the agency and across the network. In FY20, DACL will continue to promote learning opportunities and professional development at all levels, both agency wide, and in areas

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that are specific to individual roles, and short-term, and long-term goals. DACL continues to require all staff to participate in community outreach on a quarterly basis and support the agency in major community events. In addition, DACL will continue to create opportunities for all staff to engage in program and system designs.

**Increasing visibility and understanding of programs and services available** – DACL continues to socialize its new name and brand in the community in FY20, which has included increased community outreach events at 208 total events completed in FY19, increased promotion and brand visibility, including rebranding all agency vehicles. This year, the agency will focus on more earned media opportunities, increased outreach through mailings, and advertising, and a more robust multimedia presence to include videos, social media, and electronic newsletters, in addition to its print newsletters, and quarterly radio spots. DACL is particularly focused on highlighting services available in the District to all older Washingtonians. While all District seniors, adults with disabilities, and caregivers may not need our services today, DACL is focused on ensuring that all residents know that we are there if and when they need us. DACL also continues to work with the network to ensure brand consistency across all programs and services.

**Promoting consistent access to healthy nutritious food** - DACL is committed to promoting consistent access to healthy nutritious food through education, affordability, and choice. Through its community dining sites located in all eight wards, DACL provides daily lunch in a communal dining space, where residents can obtain a nutritious meal and participate in activities during the week. In addition, DACL provides a Saturday dining program at the Washington Senior Wellness Center. For older adults who are frail or homebound, DACL, through its lead agencies, provides home-delivered meals and supplements. In addition to these programs, DACL works with community organizations to develop new and innovative programs to ensure that residents have access to a variety of nutritious foods. In FY20, as part of the senior strategic plan process, DACL will be assessing the efficacy of these nutrition programs and work with the community to ensure that residents are able to access healthy food options wherever they reside in the District.

62. Please list the 5 biggest challenges that faced today by District seniors, and what actions DACL has undertaken to assist seniors with these challenges.

**Consistent access to healthy nutritious food:** Older adults who face hunger are significantly more likely to have diabetes, depression, high blood pressure, congestive heart failure, or a heart attack, and more likely to report fair or poor general health, gum disease, asthma, and at least one activity of daily living (ADL) limitation. The District has the fourth highest rate of food insecurity among all states.<sup>1</sup>

DACL is committed to promoting consistent access to a variety of healthy nutritious foods through education, affordability, and choice. Through its 46 community dining sites located in all eight wards, DACL provides daily lunch in a communal dining space, where residents can obtain a nutritious meal and participate in activities during the week. In

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<sup>1</sup>Dr. James P. Ziliak and Dr. Craig G. Gundersen. *State of Senior Hunger in America 2017: An Annual Report*. (2019). Food insecurity is defined as reports of reduced quality, variety, or desirability of diet or multiple indications of disrupted eating patterns and reduced food intake.

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addition, DACL provides a Saturday dining program at the Washington Senior Wellness Center. For older adults who are frail or homebound, DACL, through its lead agencies, provide home-delivered meals and supplements.

In addition to these programs, DACL works with community organizations to develop new and innovative programs to ensure that residents have access to a variety of nutritious foods. In FY20, as part of the senior strategic plan process, DACL will be assessing the efficacy of these nutrition programs and work with the community to ensure that residents are able to access healthy food options wherever they reside in DC.

**Social isolation and Loneliness:** More than half of District residents 60+ live alone.<sup>2</sup> Social isolation and loneliness have profoundly negative health impacts, similar to smoking 15+ cigarettes a day, and are more consequential than inactivity and obesity. Research links social isolation and loneliness to increased risks of developing chronic disease, increased risk of falls, increased risk for hospital readmissions, and increased risk of dementia.<sup>3</sup> LGBTQ older adults are twice as likely to live alone and face isolation.<sup>4</sup> Combatting social isolation continues to be a top priority for the agency.

To strengthen DACL's ability to identify and serve isolated and home-bound seniors, DACL must rely on the community itself. In FY20 we will continue to focus on strengthening volunteer models to reach more seniors, by encouraging neighbor-to-neighbor connections through regular check-in calls, home visits, and neighborhood social events and gatherings.

DACL continues to provide programs and supports to combat social isolation, which include, but is not limited to the following:

- Launching new citywide programs for LGBTQ older adults including a meal and entertainment social program, peer-led support groups, and Pride events for seniors;
- Piloting a Satellite senior wellness model in Wards 2 and 3, using community spaces to deliver high-quality senior programs throughout the wards
- Supporting the most vibrant, dynamic collection of senior villages in the country;
- Providing transportation to Senior Wellness Centers and senior events;
- Funding 46 community dining sites across the District;
- Participating in more than 200 community outreach events annually;
- Hosting large-scale events such as the Mayor's Annual Senior Holiday Celebration, Senior Symposium, Older Americans Month Events, Centenarian Salute, and the Annual Senior Picnic, in conjunction with the Department of Parks and Recreation (DPR);

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<sup>2</sup>U.S. Census Bureau; American Community Survey, 2014 - 2018 American Community Survey 5-Year Estimates.

<sup>3</sup>Holt-Lunstad, J., Smith, T. B., Baker, M., Harris, T., & Stephenson, D. (2015). Loneliness and Social Isolation as Risk Factors for Mortality. *Perspectives on Psychological Science*, 10(2), 227–237. doi: 10.1177/1745691614568352

<sup>4</sup> Wahrman, A. (2018, July 18). The facts on LGBT aging. Retrieved from <https://www.sageusa.org/resource-posts/the-facts-on-lgbt-aging/>

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- Providing more opportunities for homebound seniors to engage from home through the Cupid's Kids initiative where District of Columbia Public School students send handmade Valentine's Day cards for home-delivered meal clients.

**Care for Caregivers:** Caregivers are the backbones to our communities. They provide care for others, while often neglecting their own needs. Care for the Caregiver continues to be a priority for DACL. In FY20, DACL and the DPR will begin planning a state-of-the-art caregiver complex with a \$35 million capital investment towards rebuilding a therapeutic recreation site in Ward 7. This new complex will provide therapeutic, respite, and support services all under one roof for unpaid and family caregivers in the District. DACL will also create more events and opportunities for unpaid and family caregivers to learn, engage, socialize, and build networks of support, through activities such as an Annual Caregiving Conference, and DC's first ever Caregiver 5k run and walk in May.

**Preventing falls and other accidents:** Falls among older adults are the leading cause for both fatal and nonfatal injuries for older adults and may lead to severe physical and cognitive health problems that result in extended stays in hospitals and long-term care facilities.<sup>5</sup> In FY19, the Safe at Home Program completed the highest number of home preventative adaptation projects for DC seniors and people with disabilities in any given year, at 1,162 completions of in-home adaptations and 676 security camera installations. Since the start of the program in FY16, Safe at Home has made more than 3,000 homes safer for the District's seniors and adults with disabilities.

DACL also continues to host the annual Falls Prevention Awareness Day program, providing free falls risk assessments to residents in all eight wards. For the first time in FY19, DACL partnered with Whitman-Walker and Iona's Silver Circle program to provide a falls prevention screening at Whitman-Walker's facility in Ward 2. Preventing falls and other accidents remain a top priority for the Agency, and these programs continue to be popular among residents.

**Negative perceptions of aging and aging services:** DACL continues to focus on promoting a positive image of aging and ensuring that District residents know that one's relevancy does not decline with each birthday. DACL has heard from seniors that one of the barriers to accessing programs and services through DACL is the perceived negativity around growing older and fear of being left behind in a city that is rapidly growing and changing. Concerns regarding ageism in employment or activities in venues that cater to younger audiences have also been cited as reasons older adults may choose to not participate in their communities.

In addition to promoting services and programs, DACL is committed to using its platforms to reflect positive, active aging, particularly over its social media accounts, through various print publications such as the *Senior Beacon* and *The Informer*, and participation in many intergenerational social events such as the H Street Festival and the annual Pride Parade and Festival. In addition, the new agency tagline: Live Boldly, reflects an older generation that's active, engaged, and connected to community.

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<sup>5</sup> Falls Prevention Facts. (2018, June 4). Retrieved from <https://www.ncoa.org/news/resources-for-reporters/get-the-facts/falls-prevention-facts/>

**District of Columbia Department of Aging and Community Living**

63. Please provide the following information pertaining to the Safe at Home program.

a. Total number of applications **received** in FY19 and FY20 to date, with a breakdown by Ward.

- In FY 2019 the Safe at Home (SAH) Program completed 2,195 intakes, and enrolled 1,077 new clients.<sup>6</sup>

FY19		Number of Clients Intake Completed	Number of Clients Enrolled
Ward	1	105	55
	2	49	25
	3	35	21
	4	412	202
	5	476	234
	6	194	100
	7	523	239
	8	401	201
Age	Age 18-59	183	87
	Age 60 and over	2012	990

- In FY 2020 to date, SAH has completed 827 intakes, and enrolled 488 new clients. The ward breakdown is as follows:

FY20 YTD		Number of Clients Intake Completed	Number of Clients Enrolled
Ward	1	44	29
	2	11	5
	3	18	9
	4	154	81
	5	181	109
	6	74	34
	7	204	128
	8	141	93
Age	Age 18-59	71	49
	Age 60 and over	756	439

b. Total number of applicants that were **approved** in FY19 and FY20 to date, with a breakdown by Ward.

- In FY 2019, SAH successfully completed 1,162 home adaptation client projects, includes clients who rolled over from FY 2018. The breakdown by ward is as follows:
  - Ward 1: 61

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<sup>6</sup> Does not include rollover clients.

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- Ward 2: 19
  - Ward 3: 17
  - Ward 4: 203
  - Ward 5: 239
  - Ward 6: 121
  - Ward 7: 289
  - Ward 8: 213
- In FY20 to date, SAH has completed 361 home adaptation client projects, includes clients who rolled over from FY 2019. The breakdown by ward is as follows:
    - Ward 1: 21
    - Ward 2: 11
    - Ward 3: 9
    - Ward 4: 61
    - Ward 5: 74
    - Ward 6: 27
    - Ward 7: 83
    - Ward 8: 75
- c. Please provide the age breakdown of the participants of the Safe at Home program.

SAH Program serves District residents, age 60 and over, or adults with disabilities, age 18 and over, who are homeowners or renters of a property used as a primary residence. Please see section (a) above for the age breakdown in FY19 and FY20 to date.

- d. Please provide a category breakdown of the in-home adaptations completed in the homes in FY19 and FY20 to date.

The tables below present a breakdown and count of each project completed by type, from highest number to lowest.

- In FY 2019 SAH installed a total of 10,590 in-home adaptation by type.

<b>In-Home Adaptation by Type</b>	<b>#</b>
Grab Bar 18 inch	1,032
Grab Bar 24 inch	545
Railing - Interior	434
Grab Bar 32 inch	419
Handheld Shower	373
Bed Handle	368
Lights (Night Light w/ Battery)	363
Chair Power Lift Recliner	340
Seat Shower with Back	330
Grab Bar Custom	309
Stairlift Straight Standard up to 300 lbs Interior	309

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Clamp Handheld Shower on Grab Bar	298
Toilet Hinge riser with seat	297
Railing Iron Rail Without Pickets - Two Post (5' and Under)	287
Handheld Clamp	208
Lights Motion Sensor Indoor/Outdoor	181
Mats Shower/Bath	180
Reacher	154
Railing with Pickets Exterior 06 ft	145
Grab Bar 36 inch	133
Toilet Seat Elevated	130
Toilet Handles	122
Toilet Riser with handles	121
Railing with Pickets Exterior 07 ft	116
Railing without Pickets Interior 03 ft	111
Railing Wood Handrail Repair	106
Grab Bar "L"	101
Railing Metal Rail/Grab Bar Repair	99
Walker Rollator	93
Freedom Alert	90
Stairlift Straight Standard up to 300 lbs Exterior	86
Grab Bar 16 inch	84
Railing with Pickets Exterior 08 ft	81
Shower Curtain Curved Rod Roller Rings and Curtain	80
Shower/Bathmat	77
Tub Cut Custom	76
Laundry Backpack	75
Lights 3 Way Switch for Light on Stairs	74
Bench Tub Transfer Slide/Swivel	72
Furniture Risers	65
Railing with Pickets Exterior 09 ft	65
Railing with Pickets Exterior 05 ft	62
Railing without Pickets Interior 02 ft	59
Hurry Cane - Reg	55
Railing without Pickets Interior 12 ft	55
Toilet Comfort Height	55
Grab Bar Toilet Paper	54
Commode Bedside	52
Railing without Pickets Interior 05 ft	52
Railing without Pickets Interior 04 ft	50
Step Stool with Handle	48
Grab Bar 12 inch	44
Chair Shower Bariatric	41
Tub Lift Power	39
Railing Iron Rail Without Pickets - One Post (attached to wall)	38
Kitchen Perch Stool	35
Railing Iron Rail with Pickets - Two Post (5' and under)	35

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Railing without Pickets Interior 06 ft	33
Power for Lift	32
Clamp Handheld Shower Installed on Wall	31
Super Pole with Pivot Arm	30
Mail Catcher	29
Concrete Repair (associated with modifications)	28
Railing without Pickets Exterior 07 ft	28
Railing without Pickets Interior 10 ft	27
Railing without Pickets Interior 11 ft	26
Railing without Pickets Interior 13 ft	26
Lights Install Bulb	25
Mail Catcher	23
Wheelchair Transport Transformer 18 inch	23
Wheelchair Transport Transformer 20 inch	23
Outlet/switch/light install	22
Railing without Pickets Interior 15 ft	22
Walker Rollator (bariatric)	22
Railing Pine Wood Handrail, sanded and painted/stained	20
Stairlift Straight Long up to 300 lbs Interior	20
Tub Transfer Bench Bariatric	19
Door Tap-n-go	18
Grab Bar 42 inch	18
Railing without Pickets Interior 14 ft	17
Ramps Custom	17
Railing without Pickets Interior 08 ft	16
Threshold Repair	16
Outlet/Switch Repair	15
Railing without Pickets Interior 07 ft	15
Railing without Pickets Exterior 08 ft	14
Stair Climber	14
Chair with Arms for Dressing	13
Hip Kit	13
Railing with Pickets Exterior 01 ft	13
Ramps Aluminum Modular Systems	13
Ramps Transition Modular 2 ft	13
Shower Curtain D-Ring Rod Kit and Curtain	12
Railing without Pickets Exterior 06 ft	11
Wheelchair Transport Transformer	11
Concrete Stairs	9
Rugs - Non-Slip	9
Super Pole Without Pivot Arm	9
Toilet Seat Hinge	9
Tub Cut 18 inch	9
Doorbell	8
Railing without Pickets Exterior 03 ft	8
Railing without Pickets Exterior 05 ft	8



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Ramps Wood Platform for Portable Ramps	8
Chair Healthy Back Lift Chair with Heat	7
Grab Bar 48 inch	7
Railing without Pickets Exterior 11 ft	7
Railing without Pickets Interior 09 ft	7
Stairlift Straight Long up to 300 lbs Exterior	7
Toilet Seat Repair	7
Bed Rail Acrorail	6
HandyBar	6
Stairlift Exterior Power for Stairlift	6
Stairlift Straight Standard up to 400 lbs Interior	6
Toilet Safety Rails (DMI)	6
Door Reverse Swing for Door	5
Grab Bar 09 inch	5
Railing Iron Rail Wall Mount	5
Railing without Pickets Exterior 09 ft	5
Ramps Transition Modular 5 ft	5
Seat Shower Tub Transfer	5
Bed Hospital Electric	4
Bed Over Bed Hospital Table	4
Door Pocket Door Interior	4
Floor Tile Replace	4
Railing with Pickets Exterior 04 ft	4
Railing without Pickets Exterior 04 ft	4
Railing without Pickets Exterior 12 ft	4
Ramps Transition Modular 6 ft	4
Clamp Tub Grab Bar	3
Doorway Threshold	3
Hurry Cane - Folding	3
Railing with Pickets Exterior 03 ft	3
Railing without Pickets Exterior 14 ft	3
Ramps Transition Modular 4 ft	3
Toilet Safety Frame	3
Walker Front Wheel	3
Bed Hospital	2
Door Handles Lever	2
Railing with Pickets Exterior 02 ft	2
Railing with Pickets Interior 10 ft	2
Railing with Pickets Interior 11 ft	2
Railing with Pickets Interior 15 ft	2
Railing without Pickets Exterior 10 ft	2
Railing without Pickets Exterior 13 ft	2
Stairlift Straight Long up to 400 lbs Exterior	2
Wheelchair Platform Lift Replace	2
Brick for Walkway Repair	1
Commode Shower with Wheels	1

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Door Automatic Door Opener	1
Door Hinge Offset	1
Door Widening	1
Junction Box Install (associated with modification)	1
Lever Faucet Handles	1
Lift Patient/Hoyer	1
Railing Iron Rail with Pickets - One Post (Attached to Wall)	1
Railing with Pickets Exterior 10 ft	1
Railing without Pickets Exterior 02 ft	1
Railing Without Pickets Interior 01 ft	1
Sink Wall Hung	1
Stairlift Exterior	1
Tub Cut 24 inch	1
<i>Other &lt; \$25.00</i>	<i>8</i>
<i>Other &gt; \$25.00</i>	<i>141</i>
<b>TOTALS</b>	<b>10,590</b>

\*Please note that the total number of clients who received each project type is not additive on this table, as it would create duplication in the number of clients served. In FY 2019, SAH completed a total of 1,162 unduplicated client projects. This table reflects, by type, the number of clients who chose, received, and completed the type of modification and/or equipment within the 1,162 pool of clients served. Clients can receive more than one project type depending on his or her needs as determined by the Occupational Therapist Assessment and Scope of Work.

- In FY 2020, year to date, SAH installed a total of 3,196 in-home adaptation by type.

<b>In-Home Adaptation by Type</b>	<b>#</b>
Grab Bar 18 inch	320
Grab Bar Custom	196
Railing Iron Rail Without Pickets - Two Post (5' and Under)	162
Clamp Handheld Shower on Grab Bar	139
Grab Bar 24 inch	115
Handheld Shower	112
Chair Power Lift Recliner	110
Toilet Seat Elevated	110
Bed Handle	107
Lights (Night Light w/ Battery)	98
Stairlift Straight Standard up to 300 lbs Interior	93
Seat Shower with Back	80
Railing Wood Handrail Repair	77
Railing without Pickets Interior 03 ft	76
Mats Shower/Bath	69
Shower Curtain Curved Rod Roller Rings and Curtain	67

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Grab Bar 32 inch	65
Grab Bar "L"	64
Toilet Hinge riser with seat	63
Toilet Handles	58
Railing Metal Rail/Grab Bar Repair	55
Grab Bar 36 inch	49
Railing without Pickets Interior 02 ft	48
Grab Bar 12 inch	39
Bench Tub Transfer Slide/Swivel	37
Tub Lift Power	36
Lights Motion Sensor Indoor	33
Grab Bar Toilet Paper	32
Railing without Pickets Interior 04 ft	31
Railing without Pickets Interior 05 ft	28
Walker Rollator	25
Railing without Pickets Interior 12 ft	22
Door Tap-n-go	19
Outlet/switch/light install	19
Toilet Riser with handles	19
Railing without Pickets Exterior 07 ft	18
Toilet Comfort Height	18
Commode Bedside	17
Grab Bar 16 inch	17
Railing without Pickets Interior 13 ft	16
Bed Over Bed Hospital Table	15
Railing without Pickets Interior 15 ft	15
Chair Shower Bariatric	14
Chair with Arms for Dressing	14
Furniture Risers	14
Railing Iron Rail with Pickets - Two Post (5' and under)	14
Railing Iron Rail Without Pickets - One Post (attached to wall)	14
Ramps Custom	14
Tub Cut Custom	14
Railing without Pickets Exterior 06 ft	13
Railing without Pickets Interior 11 ft	13
Wheelchair Transport Transformer	13
Railing without Pickets Interior 06 ft	12
Lights Install Bulb	11
Railing without Pickets Exterior 04 ft	11
Railing without Pickets Interior 08 ft	11
Super Pole with Pivot Arm	11
Railing without Pickets Interior 07 ft	10
Bed Hospital Electric	9
Railing without Pickets Exterior 05 ft	9
Railing without Pickets Interior 09 ft	9
Railing without Pickets Interior 10 ft	9

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Stairlift Straight Standard up to 300 lbs Exterior	9
Tub Transfer Bench Bariatric	9
Power for Lift	7
Walker Rollator (bariatric)	7
Mail Catcher	6
Railing without Pickets Exterior 03 ft	6
Railing Without Pickets Interior 01 ft	6
Super Pole Without Pivot Arm	6
Grab Bar 42 inch	5
Railing without Pickets Exterior 02 ft	5
Railing without Pickets Exterior 08 ft	5
Railing without Pickets Interior 14 ft	5
Stairlift Straight Long up to 300 lbs Interior	5
Ramps Wood Platform for Portable Ramps	4
Toilet Seat Repair	4
Wheelchair Transport Transformer 18 inch	4
Doorbell	3
Outlet/Switch Repair	3
Railing with Pickets Interior 04 ft	3
Railing without Pickets Exterior 12 ft	3
Railing without Pickets Exterior 15 ft	3
Ramps Transition Modular 3 ft	3
Tub Cut 24 inch	3
Wheelchair Transport Transformer 20 inch	3
Clamp Handheld Shower Installed on Wall	2
Clamp Tub Grab Bar	2
Lights 3 Way Switch for Light on Stairs	2
Railing with Pickets Exterior 03 ft	2
Railing with Pickets Exterior 06 ft	2
Railing with Pickets Interior 11 ft	2
Railing without Pickets Exterior 09 ft	2
Ramps Aluminum Modular Systems	2
Ramps Transition Modular 4 ft	2
Ramps Transition Modular 6 ft	2
Sink Pedestal	2
Stairlift Straight Standard up to 400 lbs Interior	2
Toilet Seat Hinge	2
Walker Front Wheel	2
Bed Hospital	1
Brick for Walkway Repair	1
Concrete Repair (associated with modifications)	1
Door Pocket Door Interior	1
Grab Bar 48 inch	1
Grab Bar Flip Up Stainless	1
Lever Faucet Handles	1
Railing Iron Rail Wall Mount	1

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Railing Iron Rail with Pickets - One Post (Attached to Wall)	1
Railing with Pickets Exterior 01 ft	1
Railing with Pickets Exterior 04 ft	1
Railing with Pickets Exterior 08 ft	1
Railing with Pickets Exterior 10 ft	1
Railing with Pickets Interior 05 ft	1
Railing with Pickets Interior 08 ft	1
Railing with Pickets Interior 13 ft	1
Railing with Pickets Interior 15 ft	1
Railing without Pickets Exterior 13 ft	1
Shower Curtain D-Ring Rod Kit and Curtain	1
Stairlift Exterior Power for Stairlift	1
Stairlift Straight Long up to 300 lbs Exterior	1
Tub Cut 18 inch	1
Wheelchair Platform Lift Replace	1
<b>Totals</b>	<b>3,196</b>

\*Please note that the total number of clients who received each project type is not additive on this table, as it would create duplication in the number of clients served. In FY 2020 to date, SAH has completed 361 client projects. This table reflects, by type, the number of clients who chose, received and completed the type of modification and/or equipment within the 361 pool of clients served. Clients can receive more than one project type depending on his or her needs as determined by the Occupational Therapist Assessment and Scope of Work.

- e. Please provide the average cost per program participant in FY19 and FY20 to date.
  - In FY2019, the average cost per project was \$5,278.76.
  - In FY2020 year to date, the average cost per project has been \$5,044.00.
  
- f. Please provide the total number of requests for a private security camera system in FY19 and FY20 to date.
  - In FY2019, 1,210 security camera referral requests were received.
  - In FY2020, year to date, 439 security camera referral requests have been received.
  
- g. How do applicants access the Safe at Home program? How are determinations made as to eligibility? What office makes these decisions?
  - Applicants access the SAH program through the DACL Information & Referral Assistance (I&RA) call center. The I&RA team provides information on SAH program services, informs applicants of eligibility requirements (income and falls-risk), collects basic demographic information, and refers interested applicants to SAH grantees.

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- The SAH grantee contacts the applicant by phone to administer the Vulnerable Elders Survey (VES-13), a simple function-based tool that screens for those in need of SAH services. Applicants with a score of four or higher have moderate or higher mobility challenges and are eligible to apply for SAH program services. These applicants are sent a program application.
  - Once the grantee receives eligibility documentation back from the client to verify age, income, and residency, the applicant is enrolled in the SAH program.
64. Please list the number of calls the Housing Coordinator within DACL’s ADRC received, and a breakdown of the housing requests in FY19 and FY20 to date.

**Housing Oversight Data FY19-FY20 (Q1)**

<b>FY19</b>	<b>Total Contacts</b>	<b>Housing Requests</b>
<b>FY19 Total</b>	171	77
<b>FY20 Q1</b>	33	7

The “total contacts” column reflects the universe of calls/in person contacts the housing coordinator had during the period. These calls range from individuals who are asking for a landlord contact list, to those seeking information about reverse mortgages to more complicated issues that require a referral to legal services. The “housing requests” column is specific to individuals who have no housing and are seeking assistance to find housing in the community.

The contacts with the housing coordinator come both from internal staff at DACL and also from external contacts such as social workers in the senior network, community members and individuals who may have had contact with the agency in the past and whose housing situation has changed requiring additional information or support.

65. How many clients were provided services in FY19 and FY20 to date, and how many clients are in the District yet do not utilize the services of DACL?

Recent U.S. Census data shows that DC’s population has reached 702,455. Of that number 16 percent or 119,417 individuals are 60 years of age or older.

DACL’s Senior Service Network served 16,162 clients in FY19 and approximately 11,563 clients in the first quarter of FY20. The Aging and Disability Resource Center (ADRC) served 2,763 clients in FY19 and 787 clients in the first quarter of FY20, as well as receiving 36,111 calls in FY19 and 10,699 calls in the first quarter of FY20.

Additionally, many seniors participated in DACL’s events throughout the year, including DACL’s signature events such as the Mayor’s Annual Symposium (636 in FY19), Mayor’s Annual Holiday Celebration (estimated at approximately 3,000 in FY19), and Older American’s Month Breakfast (approximately 313 in FY19).

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DACL hosted or participated in 208 outreach events across the city in FY19 and 54 outreach events in the first quarter of FY20.

66. Please provide utilization for various services (i.e. congregate meals, case management, etc.) for DACL-funded program areas overall, then broken down by each provider.

Please see Attachment Q66 – FY19 Service Units by Service.  
 Please see Attachment Q66 – FY19 Total Units of Each Service.  
 Please see Attachment Q66 – FY20 Service Units by Service.  
 Please see Attachment Q66 – FY20 Total Units of Each Service.

The following data reflects the number of clients served under each ADRC program in FY19 and FY20:

FY19	Number Served
Community Social Work and Nursing Home Transition	389
Information and Referral/Assistance	36,111
Medicaid Enrollment: EPD Waiver	2,250
Adult Day Health Program	124

FY20 Q1	Number Served
Community Social Work and Nursing Home Transition	152
Information and Referral/Assistance	10,699
Medicaid Enrollment: EPD Waiver	622
Adult Day Health Program	13

67. Please provide a list of The Community Transition and Social Work team that is comprised of social workers, transition coordinators, case managers, and a housing coordinator who provide transition assistance for adults with disabilities and older adults from institutional long-term care settings back to the community. Social workers on this team also provide assistance to DC residents, ages 1959, already living in the community, who need assistance accessing community services and supports.

Community Social Work Team  
 Elaine Richardson-Dalzell – Supervisory Social Worker  
 Ramona Butler - Social Worker  
 Melanie Gilliam - Social Worker  
 Vanessa Hicks-Edwards - Social Worker  
 Joel Lucas - Social Worker

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Orisia Wallace - Social Worker

Nursing Home Transition Team

- Angela Fields – Supervisory Social Worker
- Ekundayo Akinola - Transition Coordinator
- Emma Baxter – Transition Coordinator
- Jemila Darku - Outreach Specialist
- Brie’Asha Nwanze - Transition Administrative Specialist
- Gwen Noonan-Jones - Transition Coordinator
- Plathon Watson - Housing Coordinator
- Margaret Woods – Transition Coordinator
- Rolanda Wray - Transition Coordinator

68. What type(s) of assistance does the agency currently provide to aid seniors completing agency forms to enroll in the agency’s services

The Aging and Disability Resource Center’s (ADRC) Information and Referral/Assistance (I&R/A) staff provide a point of entry into the senior service and disability service networks. District of Columbia residents can call, email, or visit in person to obtain assistance on accessing a wide range of home and community-based services, long-term care options, and public benefits.

ADRC’s Medicaid enrollment staff assists individuals applying for the Elderly and persons with Physical Disabilities Waiver (EPD) Waiver or State Plan services/Adult Day Health program.

The Department of Human Services (DHS) also has a Social Service Representative (SSR) located at 500 K Street NE three days a week. DACL schedules appointments for the SSR, and the appointments allow seniors to receive 1:1 assistance in enrolling in benefits.

69. How many home meals were provided in FY19 and FY20 to date?  
 a. Provide the number of home-delivered meals with a breakdown by Ward.

Home-Delivered Meals Served		
Ward	FY19	FY20 Q1*
1	59,190	13,882
2	54,661	13,075
3	45,124	10,689
4	80,074	19,630
5	117,614	35,228
6	78,584	19,842
7	185,504	47,290
8	130,187	35,192
Total	750,937	194,828



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- b. How many seniors are enrolled in the home-delivered meal program? Please provide a breakdown by Ward.

Home-Delivered Meals Clients Served		
Ward	FY19	FY20 Q1*
1	374	275
2	297	232
3	207	166
4	376	300
5	525	415
6	394	277
7	834	666
8	548	439
Total	3,555	2,770

- c. How does this count compare to the number of requests received?

DACL uses a priority scale for its nutrition programs that was developed by nutritionists in the Senior Service Network and approved by DACL. Each lead agency controls a specific number of slots for home-delivered meals for that Ward and can allocate them how they choose. In FY19, DACL expanded the number of slots to make sure the highest priority clients were receiving meals. In FY20, DACL continues to work with each lead agency to make sure the highest priority clients are served through the program. Each lead agency has a different enrollment process for its DACL-funded programs, but each lead agency knows that if it assesses individual need using the priority scale, DACL will work with the lead agency to ensure the highest priority seniors are enrolled in the program, even if all of the lead agency slots are being used.

- d. How does this count compare to the official census of elderly residents by Ward?

Recent U.S. Census data shows that DC’s population has reached 702,455. Of that number 16 percent or 119,417 individuals are 60 years of age or older. Both home delivered meals and congregate meals programs reach approximately 7,668 unduplicated seniors annually with 3,555 seniors receiving home delivered meals and 4,550 receiving congregate meals. The home-delivered meal program is not intended to serve every senior in the District of Columbia. This program targets primarily home-bound seniors and/or seniors with high nutrition/hunger risk who would not otherwise be able to afford and/or access a meal.

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e. Provide the number of congregate meals with a breakdown by Ward?

Congregate Meals Served		
Ward	FY19	FY20 Q1*
1	39,680	9,535
2	45,830	11,101
3	10,303	2,237
4	32,157	8,119
5	80,896	17,683
6	31,979	7,306
7	27,584	6,188
8	43,102	9,215
Total	311,531	71,384

f. Provide the list of congregate meal sites by Ward.

Please see Attachment Q69 – Congregate Meals Sites.

\*FY20 Q1 numbers are not finalized. Grantees have up to 2 months to enter data.

70. How many clients received transportation services in FY19 and FY20 to date?

a. Provide a breakdown of transportation services by Ward and the general reason for transportation (i.e. medical, recreational, etc.)

FY19	Medical Trips		Day Care Trips		Wellness Trips		Group Trips		Total	
	Trips	Clients*	Trips	Clients*	Trips	Clients*	Trips	Clients*	Trips	Clients**
Ward 1	6,023	124	6,037	19	14,672	49	7,534	254	34,266	407
Ward 2	1,947	64	1,432	7	2,255	6	4,811	127	10,445	199
Ward 3	3,213	82	2,797	14	1,932	6	3,130	90	11,072	187
Ward 4	10,166	228	7,998	48	11,482	41	6,684	219	36,330	490
Ward 5	12,349	307	10,320	30	12,807	75	9,912	277	45,388	644
Ward 6	8,201	207	1,262	4	6,358	32	4,359	205	20,180	425
Ward 7	11,886	338	594	2	27,600	116	9,320	315	49,400	683
Ward 8	10,455	278	190	1	19,128	113	12,103	305	41,876	630

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FY20	Medical Trips		Day Care Trips		Wellness Trips		Group Trips		Total	
	Trips	Clients*	Trips	Clients*	Trips	Clients*	Trips	Clients*	Trips	Clients**
Ward 1	1,274	63	1,304	15	3,696	42	1,770	145	<b>8,044</b>	<b>242</b>
Ward 2	413	33	234	4	506	5	1,208	79	<b>2,361</b>	<b>118</b>
Ward 3	685	50	544	11	551	6	717	61	<b>2,497</b>	<b>125</b>
Ward 4	2,260	122	2,265	30	2,705	42	1,493	129	<b>8,723</b>	<b>281</b>
Ward 5	2,338	165	2,251	26	3,524	54	2,381	154	<b>10,550</b>	<b>385</b>
Ward 6	1,771	119	404	4	2,128	28	2,038	181	<b>5,357</b>	<b>275</b>
Ward 7	2,671	200	56	1	7,093	96	1,054	135	<b>11,858</b>	<b>422</b>
Ward 8	1,967	151	0	0	5,965	82	2,437	162	<b>10,313</b>	<b>356</b>

\*Unduplicated

\*\*This may include some duplication. Trips are categorized as Medical and Other (day care, wellness, and group trips). Each system provides an unduplicated count, but when added together, there may be some overlap

71. Please provide a list of services that each Lead Agency provides by Ward. Please include the number of times each service has been provided in each Ward.

FY19 Services Units by Lead Agency/Ward								
SERVICE	1	2	3	4	5	6	7	8
CareGiver Case Management	280	74	0	183	292	16	34	46
Case Management	2,066	2,465	3,885	1,640	3,665	2,775	3,476	3,090
Comprehensive Assessment	414	290	270	476	1,037	143	678	434
Congregate Meals - Weekdays	39,530	45,789	10,257	32,126	80,656	31,688	25,379	40,778
Congregate Meals - Weekend	150	41	46	31	240	291	2,205	2,324
Counseling	23,240	23,892	3,495	22,992	8,625	8,170	10,330	14,530
Extended Geriatric Day Care	22	49	0	4	149	14	692	150
Geriatric Day Care	7,040	931	1,650	14,580	20,211	2,212	6,491	1,635
Health Promotion	23,663	37,798	4,748	19,422	48,369	15,690	22,654	21,382
Home Delivered Meals – Weekdays	52,881	37,770	33,613	62,935	81,734	65,240	161,030	102,966
Home Delivered Meals – Weekend	6,310	17,156	11,511	17,139	35,880	13,079	24,474	27,221
Nutrition Counseling	508	806	388	413	795	373	248	755
Recreation/ Socialization	72,371	48,037	8,197	49,716	110,690	56,497	51,859	67,511
Transportation & Escort	6,023	1,947	3,213	10,166	12,349	8,201	11,886	10,455
Transportation to Activities	28,194	8,497	7,859	26,164	33,036	11,979	37,514	31,389

**District of Columbia Department of Aging and Community Living**

<b>FY20 Q1 Services Units by Lead Agency/Ward</b>								
<b>SERVICE</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>
CareGiver Case Management	101	28	7	89	162	5	42	22
Case Management	331	605	980	485	790	590	637	535
Comprehensive Assessment	99	106	27	155	339	29	116	80
Congregate Meals - Weekdays	9,505	11,098	2,229	8,118	17,652	7,242	5,685	8,686
Congregate Meals - Weekend	30	3	8	1	31	64	503	529
Counseling	7,124	10,772	966	7,720	2,710	2,634	1,875	3,816
Extended Geriatric Day Care	6	20	0	4	64	0	54	18
Geriatric Day Care	1,476	200	280	4,239	5,225	360	1,518	408
Health Promotion	6,877	14,890	1,467	6,376	13,548	4,258	6,191	5,384
Home Delivered Meals – Weekdays	11,477	9,174	7,596	15,475	26,669	16,410	40,493	26,694
Home Delivered Meals – Weekend	2,406	3,899	3,093	4,155	8,559	3,432	6,797	8,498
Nutrition Counseling	142	111	53	134	461	102	21	101
Recreation/ Socialization	22,426	26,746	3,224	17,008	22,857	13,303	9,749	12,302
Transportation & Escort	1,274	413	685	2,260	2,338	1,771	2,671	1,967
Transportation to Activities	4,431	2,325	1,624	5,934	6,845	3,059	7,869	7,193

72. Please describe whether the agency has any tool for oversight of social workers under each Lead Agency. Why or why not?

DACL conducts monitoring of all Lead Agency social workers through both announced and unannounced site visits throughout the fiscal year. During these site visits, DACL conducts reviews of the case management files of the social workers. DACL is able to determine if the client files are in compliance with the Department’s Case Management Service Standards. The Case Management Service Standards are a quality assurance measure to ensure uniformity in service delivery and reporting. They also establish quality control measures for our grantees delivering a service.

In FY 19, in collaboration with the Senior Service Network, DACL began the process of revising the social work service standards for Comprehensive Assessment and Case Management. These revised standards have become effective in FY 20 and require Lead Agencies to enter case management files in our database system. This will allow DACL to improve our monitoring system by tracking response times of social workers to client requests and ensuring case management services are delivered in a timely and effective manner. A standardized format for clinical documentation ensures that assessments, case management and referrals are made in a timely and efficient manner to provide high quality services to clients.

## District of Columbia Department of Aging and Community Living

73. Please include the quarterly scorecards for grantees for their services that were conducted in FY19.

Please see Attachment Q73 – Grantee Quarterly Scorecards in FY19.

In FY20, DACL is replacing the scorecards and implementing a new internal tool (“Grantee Profile”) to allow the agency to more effectively track financial and programmatic data. The goal is to coordinate this effort with the revision of DACL’s service standards in order to enhance and fully align program monitoring to these. The outcome will be an improved grant monitoring strategy that can lead to a better understanding of grantee performance and quality of services.

74. Has DACL undergone any changes in distribution of funding to its grantees from FY19 to FY20?

In FY19 (for FY20 operations), DACL competed and awarded funding for Adult Day Care and LGBTQ Programming.

- The agency awarded a grant of \$650,768 to IONA for Adult Day Care. This grant was previously awarded to Downtown Cluster's Geriatric Daycare Center. Iona will be using the funds to operate a new Adult Day Care Center in Congress Heights (scheduled to open April 2020) that will provide a full range of geriatric day care services preferably in underserved areas in Wards 5, 7, or 8. The service scope for this RFA includes providing: 1) therapeutic services to functionally-impaired District residents 60 years and older, in order to avoid or forestall institutionalization; 2) respite for family members and caregivers, engaging them in prevention health and education activities; 3) specialized services to easily access resources and support services needed to effectively navigate long-term care options to remain independent and connected to the community and; 4) resource information on services and supports, e.g., Elderly and Persons with Disabilities (EPD) Waiver, that prevent institutionalization when they are no longer able to function in the day care setting. The center is scheduled to open in April, 2020.
- DACL awarded LGBTQ grant funding to:
  - The DC Center for LGBT (\$47,077) to provide coffee/conversation events, social lunches, intergenerational thanksgiving celebration, theater/film outings, and intergenerational tables.
  - Capitol Hill Village (\$44,423) to provide intergenerational programming citywide and promote/increase LGBTQ cultural competency in the District for businesses and DACL grantees.
  - Seabury Resources for the Aging (\$40,000) to provide citywide quarterly events around a meal and recreational, social and/or educational activities to serve LGBTQ seniors.
  - IONA (\$66,500) to provide peer-led support groups around the city for LGBTQ seniors in partnership with Whitman Walker Health.
  - Terrific Inc (\$19,000) to provide a LGBTQ senior pride celebration during pride.

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In FY19, DACL addressed unplanned increases in transportation costs under Seabury Connector due to grantee's rising costs in fleet maintenance, occupancy, and insurance. DACL provided a net budget increase of \$557,544 in the FY19 distribution to address the additional need.

In addition, in FY20 DACL has increased funding to the Hungry Harvest and SHARE/Gleaning Table Programs to serve and give more seniors greater food options and access healthy foods. The Hungry Harvest Program received an additional \$8,250 for an annual total of \$16,950 and is available to 120 District seniors in Wards 5, 6, 7, and 8, on a first-come, first-serve basis. Participants are enrolled through our grantee, Seabury Resources for Aging. The program runs from May - September and eligible participants of the program receive a delivery of fresh fruits and vegetables every other week from Hungry Harvest.

The SHARE Foods/Gleaning Table Program received an additional \$21,180 for an annual total of \$72,500 and is run by Kingdom Care Senior Village and the True Gospel Tabernacle Baptist Church. The program provides monthly SHARE Food boxes within the community and to homebound seniors. Boxes are purchased from Catholic Charities' SHARE Food Network Program healthy groceries, with four to six pounds of frozen proteins and eight to 12 pounds of fresh fruits and vegetables, sometimes with seasonal grocery or dessert items. Gleaning Table distributes fresh produce monthly for seniors to pick up and choose their produce.

75. Has DACL made any improvements to its grants processes in FY20?

DACL has made significant improvements to its grants processes. After collaboration with the grantees, DACL successfully rolled out a standard automated invoicing template ("M-1") that all grant recipients use when submitting their monthly invoices for reimbursement by DACL. The template provides the agency and grantees with increased transparency into how program costs are allocated across cost categories and services. As a result, the invoicing template has improved the quality of monitoring across grant programs and improved programmatic and financial dialogue between the agency and grant recipients. DACL has also revised and updated its service standards for case management and other related services. DACL will be releasing an updated simplified grants policy manual in FY20 along with the remainder of the service standard updates. The net effect of these updates will create more transparency and create standardized expectations amongst grants and grantees.

76. Please give a detailed description of each senior village including:
- Updated status of the village;

Senior villages are independent, nonprofit, community-based organizations. Because senior villages are distinct entities, DACL does not have specific knowledge of each village's status outside of the grant funding provided by DACL.

- Description of programs carried out at each village;

DACL does not have access to each organization's operational and programmatic capabilities. In general, senior villages provide in-home support services and other community-based activities necessary to age in place. Services may include:

## District of Columbia Department of Aging and Community Living

transportation, friendly home visits, help with shopping, help running errands, household maintenance and cleaning, fitness activities, social outings, and assistance during a doctor visit. In FY19 and FY20 to date, DACL has provided funds to the villages to support staff and volunteer development, village expansion into underserved wards, and the creation of innovative and creative programming.

c. Operating budget of each village; and

Villages are financially independent from the government. DACL does not have access to each organization's accounting records.

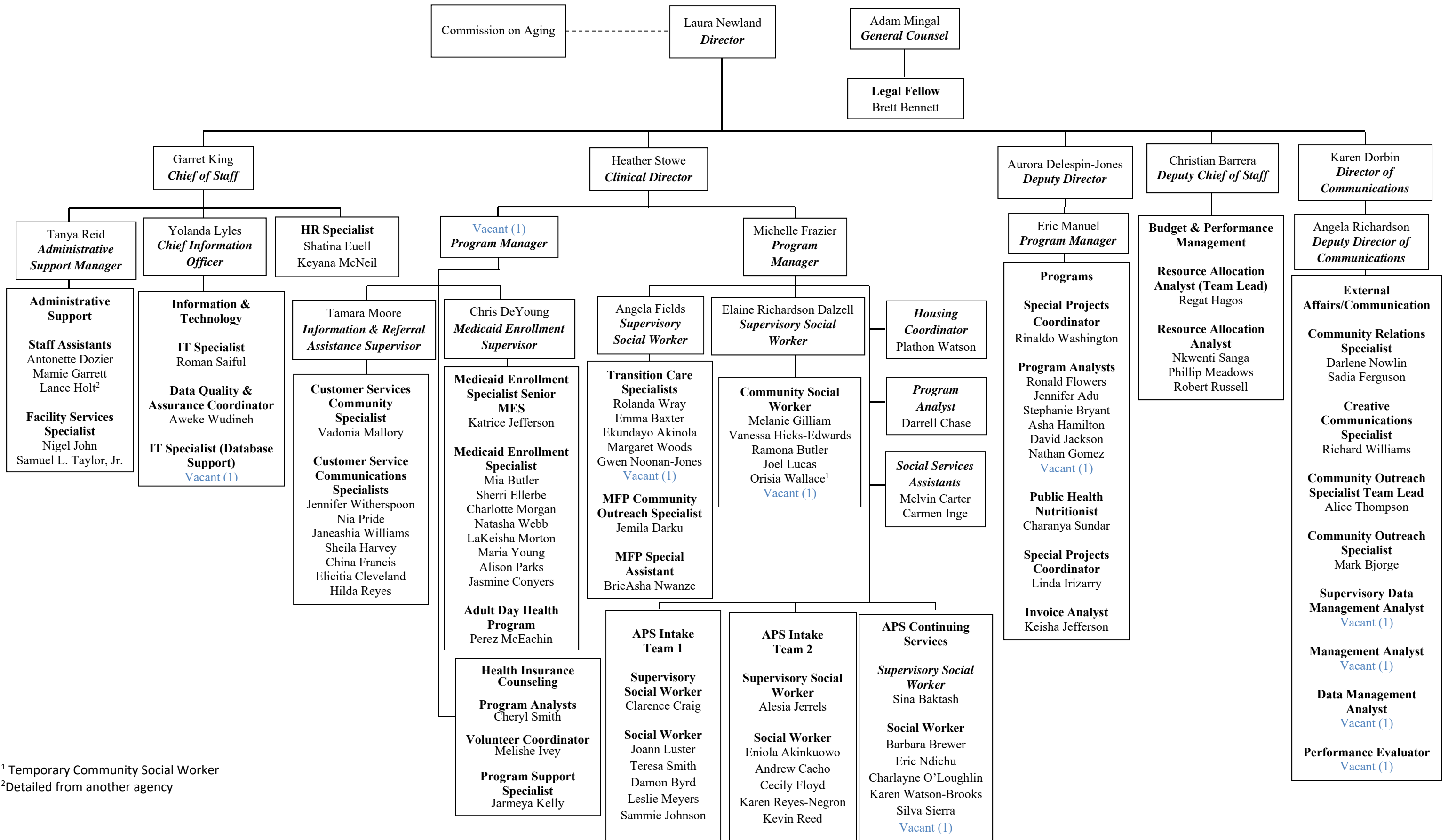
In FY19, DACL allocated \$303,000 to fund 12 villages (five more villages than in FY18), each receiving an equitable amount of \$23,500. The grant is administered and managed by the Foggy Bottom West-End Village, as decided by its fellow villages. There is an administrative fee provided to Foggy Bottom West-End Village to coordinate the grant.

d. Biggest challenge that each village faces.

Villages are operated independently, and based on feedback from the villages, villages can have unique operational challenges. Below are common challenges that villages have expressed.

- **Invoicing:** Some villages have finance/accounting personnel on staff while some villages rely on volunteers. This creates inconsistencies in invoicing over the course of a year.
- **Data reporting:** The villages expressed concerns about providing demographic data on their individual participants. In partnership with the villages, DACL developed methods for the villages to provide programmatic aggregate data via a customized data entry form. This has helped the agency collect important information on who is being served while preserving the privacy requested by villages.
- **Capacity:** Many villages share a common challenge in creating organizational capacity to generate revenue, as well as collaborating effectively among villages throughout the District.

# Department of Aging and Community Living Organizational Chart (1/28/2020)



<sup>1</sup> Temporary Community Social Worker

<sup>2</sup> Detailed from another agency



**Department of Aging and Community Living  
Organizational Chart (1/28/2020)**

<sup>1</sup> Temporary Community Social Worker  
<sup>2</sup> Detailed from another agency

Attachment Q2 - Schedule A (January 28, 2020)

Name	Title	Program & Activity Name	Grade	Step	Salary	FY20 Fringe (22.3%)	Federal/Local Law Applies	Job Status (Reg/Term/Temp/V acant/Frozen)	Length of Time with Agency
Sundar,Charanya	Public Health Nutritionist	Agency Management Services	12	1	76,126.00	16,976.10	Federal	Reg	1/6/2020
Crowder,Maxine R	Program Analyst	Agency Management Services	13	10	113,002.00	25,199.45	Federal	Reg	12/6/2004
Gomez,Nathan	Program Analyst	Agency Management Services	12	1	76,126.00	16,976.10	Federal	Reg	10/13/2019
Bryant,Stephanie	Program Analyst	Agency Management Services	12	2	78,487.00	17,502.60	Federal	Reg	5/15/2017
Ivey,Melishe	Volunteer Coordinator	Consumer Info., Assistance and Outreach	12	1	76,126.00	16,976.10	Federal	Reg	3/5/2018
Smith,Cheryl A	Program Analyst	Consumer Info., Assistance and Outreach	12	2	78,487.00	17,502.60	Federal	Term	1/7/2019
Nwanze,Brie'Asha L.	Special Assistant	Consumer Info., Assistance and Outreach	11	2	63,498.00	14,160.05	Intra-District Federal	Temp	8/5/2019
Darku,Jemila S.	Community Outreach Coordinator	Consumer Info., Assistance and Outreach	12	1	76,126.00	16,976.10	Intra-District Federal	Term	6/26/2017
Garrett,Mamie R	Staff Assistant	Agency Management Services	9	10	65,747.00	14,661.58	Local/Federal	Reg	8/26/1985
Sanga,Nkwenti Patrick	Resource Allocation Analyst	Agency Management Services	13	8	107,380.00	23,945.74	Local/Federal	Reg	5/29/2005
Hamilton,Asha C	Program Analyst	Agency Management Services	12	2	78,487.00	17,502.60	Local/Federal	Reg	1/7/2019
Gilliam,Melanie	Transition Care Specialist	Home and Community Based Support	12	6	87,931.00	19,608.61	Local/Federal	Reg	6/17/2013
Crawford Mallory,Vadonia M	Customer Svcs Community Spec	Consumer Info., Assistance and Outreach	11	8	75,360.00	16,805.28	Local/Federal	Reg	2/2/1998
Newland,Laura S	Director	Agency Management Services	E4	0	189,193.53	42,190.16	Local/Federal	Reg	11/9/2015
Meadows,Phillip M	Resource Allocation Analyst	Agency Management Services	13	5	98,947.00	22,065.18	Local/Federal	Reg	1/7/2019
Saiful,Md Roman	IT SPEC (DATAMGT/CUSTSPT)	Agency Management Services	12	1	76,126.00	16,976.10	Local/Federal	Reg	1/6/2020
Ferguson,Sadia	Community Relations Specialist	Consumer Info., Assistance and Outreach	12	3	80,848.00	18,029.10	Local/Federal	Reg	9/5/2017
Thompson,Alice Arcenia	Community Outreach Specialist	Consumer Info., Assistance and Outreach	13	6	101,758.00	22,692.03	Local/Federal	Reg	8/16/2009
Noonan-Jones,Gwendolyn A.	Public Health Analyst	Home and Community Based Support	12	9	95,014.00	21,188.12	Local/Federal	Reg	10/27/2008
Watson,Plathon	Housing Coordinator	Consumer Info., Assistance and Outreach	12	6	87,931.00	19,608.61	Local/Federal	Reg	1/13/2014
Richardson,Angela Maria	Deputy Director of Communication	Consumer Info., Assistance and Outreach	14	0	113,000.00	25,199.00	Local/Federal	Reg	1/6/2020
Hagos,Regat G.	Resource Allocation Analyst (T	Agency Management Services	14	3	110,297.00	24,596.23	Local/Federal	Reg	4/21/2014
Dozier,Antonette D	Staff Assistant	Agency Management Services	9	10	65,747.00	14,661.58	Local/Federal	Reg	1/7/2008
King,Garret	Chief of Staff	Agency Management Services	14	0	150,979.62	33,668.46	Local/Federal	Reg	3/24/2014
Dorbin,Karen	Director of Communications	Consumer Info., Assistance and Outreach	15	0	125,000.00	27,875.00	Local/Federal	Reg	10/11/2016
Akinola,Ekundayo K	Transition Care Specialist	Home and Community Based Support	12	8	92,653.00	20,661.62	Local/Federal	Reg	11/2/2014
Hicks-Edwards,Vanessa L	Transition Care Specialist	Home and Community Based Support	12	6	87,931.00	19,608.61	Local/Federal	Reg	6/5/2012
Irizarry,Linda	Special Projects Coordinator	Agency Management Services	12	8	92,653.00	20,661.62	Local/Federal	Reg	6/5/2012
Vacant	Program Manager	Home and Community Based Support	14	0	107,000.00	23,861.00	Local/Federal	Vacant	n/a
Lyles,Yolanda	IT Specialist	Agency Management Services	14	3	110,297.00	24,596.23	Local/Federal	Reg	10/9/2007
Kelly,Jarmeya F	Program Support Specialist	Consumer Info., Assistance and Outreach	11	2	63,498.00	14,160.05	Local/Federal	Term	9/6/2019
Wray,Rolanda	Transition Care Specialist	Home and Community Based Support	12	5	85,570.00	19,082.11	Local/Federal	Reg	4/7/2013
Baxter,Emma	Transition Care Specialist	Home and Community Based Support	12	5	85,570.00	19,082.11	Local/Federal	Reg	11/2/2014
Woods,Margaret L	Program Coordinator	Home and Community Based Support	13	6	101,758.00	22,692.03	Local/Federal	Reg	4/8/2013
Taylor Jr.,Samuel L L	Facilities Services Specialist	Agency Management Services	12	6	87,931.00	19,608.61	Local/Federal	Reg	5/31/2015
Vacant	IT Specialist (Data Support)	Agency Management Services	13	0	87,703.00	19,557.77	Local/Federal	Vacant	n/a
Lucas,Joel	Transition Care Specialist	Home and Community Based Support	12	4	83,209.00	18,555.61	Local/Federal	Reg	11/28/2016
John,Nigel A.	Facilities Services Specialist	Agency Management Services	12	7	90,292.00	20,135.12	Local/Federal	Reg	1/20/2015
Vacant	Program Analyst	Agency Management Services	12	0	76,126.00	16,976.10	Local/Federal	Vacant	n/a
Jefferson,Keisha	Invoicing Specialist	Agency Management Services	11	2	63,498.00	14,160.05	Local/Federal	Reg	12/23/2019
Vacant	Data Management Analyst	Agency Management Services	13	0	87,703.00	19,557.77	Local/Federal	Vacant	n/a
Vacant	Supervisory Data Management Analyst	Agency Management Services	14	0	107,843.06	24,049.00	Local/Federal	Vacant	n/a
Vacant	Performance Evaluator	Agency Management Services	13	0	87,703.00	19,557.77	Local/Federal	Vacant	n/a
Euell,Shatina	Human Resources Specialist	Agency Management Services	12	1	76,126.00	16,976.10	Local/Federal	Reg	5/26/2019
Bennett,Brett	Attorney Advisor	Agency Management Services	9	0	59,554.00	13,280.54	Local/Federal	Term	1/21/2020
Russell,Robert	Resource Allocation Analyst	Agency Management Services	13	1	87,703.00	19,557.77	Local/Federal	Reg	7/8/2019
Bjorge,Mark L.	COMMUNITY OUTREACH SPEC	Consumer Info., Assistance and Outreach	12	5	85,570.00	19,082.11	Local/Federal	Reg	12/8/2014
Fields,Angela	SUPERVISORY SOCIAL WORKER	Home and Community Based Support	13	0	95,000.00	21,185.00	Local/Federal	Reg	2/22/2016
Butler,Mia	Customer Service Specialist	Consumer Info., Assistance and Outreach	11	5	69,429.00	15,482.67	Local/Federal	Reg	5/11/2015
Morgan,Charlotte	Customer Service Specialist	Consumer Info., Assistance and Outreach	11	6	71,406.00	15,923.54	Local/Federal	Reg	2/22/2016
Ellerbe,Sherri A	Customer Service Specialist	Consumer Info., Assistance and Outreach	11	6	71,406.00	15,923.54	Local/Federal	Reg	1/26/2015
Pride,Nia	Custom Service Communications	Consumer Info., Assistance and Outreach	11	5	69,429.00	15,482.67	Local/Federal	Reg	6/27/2016
Harley,Sheila	Custom Service Communications	Consumer Info., Assistance and Outreach	11	3	65,475.00	14,600.93	Local/Federal	Reg	3/20/2017
Webb,Natasha	Customer Service Specialist	Consumer Info., Assistance and Outreach	11	4	67,452.00	15,041.80	Local/Federal	Reg	3/7/2016
Moore,Tamara	Information, Referral and Assi	Consumer Info., Assistance and Outreach	13	0	99,807.00	22,256.96	Local/Federal	Reg	7/23/2018
Mingal,Adam Branden	General Counsel	Agency Management Services	2	0	138,943.95	30,984.50	Local/Federal	Reg	10/3/2018
McEachin,Perez	Custom Service Communications	Consumer Info., Assistance and Outreach	11	1	61,521.00	13,719.18	Local/Federal	Reg	9/3/2019
DeYoung,Christopher	Medicaid Enrollment Supervisor	Consumer Info., Assistance and Outreach	13	0	99,807.00	22,256.96	Local/Federal	Reg	7/23/2018
Wudineh,Aweke	Data Quality Assurance Coordi	Agency Management Services	12	5	85,570.00	19,082.11	Local/Federal	Reg	11/2/2014
Adu,Jennifer	Program Analyst	Agency Management Services	12	5	85,570.00	19,082.11	Local/Federal	Reg	8/11/2014
Parks,Alison Browne	Custom Service Communications	Home and Community Based Support	11	3	65,475.00	14,600.93	Local/Federal	Reg	7/8/2019

Manuel,Eric D	Program Manager	Agency Management Services	14	0	118,450.00	26,414.35	Local/Federal	Reg	1/7/2019
Reyes,Hilda J.	Custom Service Communications	Consumer Info., Assistance and Outreach	11	1	61,521.00	13,719.18	Local/Federal	Reg	10/1/2018
China,Frances A.	Custom Service Communications	Consumer Info., Assistance and Outreach	11	1	61,521.00	13,719.18	Local/Federal	Reg	10/1/2018
Witherspoon,Jennifer	Custom Service Communications	Consumer Info., Assistance and Outreach	11	4	67,452.00	15,041.80	Local/Federal	Reg	6/27/2016
Williams,Janeashia	Custom Service Communications	Consumer Info., Assistance and Outreach	11	3	65,475.00	14,600.93	Local/Federal	Reg	2/6/2017
FLOWERS Jr.,RONALD D	Grants Management Specialist	Agency Management Services	12	10	97,375.00	21,714.63	Local/Federal	Reg	5/15/2017
Nowlin,Darlene E	Community Relations Specialist	Consumer Info., Assistance and Outreach	12	3	80,848.00	18,029.10	Local/Federal	Reg	5/29/1991
McNeil,Keyana	Human Resources Specialist	Agency Management Services	12	1	76,126.00	16,976.10	Local/Federal	Reg	1/21/2020
Jackson,David	Program Analyst	Agency Management Services	12	2	78,487.00	17,502.60	Local/Federal	Reg	9/16/2018
Conyers,Jasmine	Custom Service Communications	Home and Community Based Support	11	3	65,475.00	14,600.93	Local/Federal	Reg	7/8/2019
Cleveland,N. Elicitia	Medicaid Enrollment Specialist	Consumer Info., Assistance and Outreach	11	3	65,475.00	14,600.93	Local/Federal	Reg	2/6/2017
Young,Maria Y	Custom Service Communications	Consumer Info., Assistance and Outreach	11	3	65,475.00	14,600.93	Local/Federal	Reg	10/2/2017
Stowe,Heather	Clinical Director	Home and Community Based Support	16	0	164,800.00	36,750.40	Local/Federal	Reg	6/10/2019
Butler,Ramona	Program Coordinator	Home and Community Based Support	13	2	90,514.00	20,184.62	Local/Federal	Reg	4/8/2013
Reid,Tanya	Administrative Services Superv	Agency Management Services	13	0	93,776.35	20,912.13	Local/Federal	Reg	3/24/2014
Morton,Lakeisha	Medicaid Enrollment Specialist	Consumer Info., Assistance and Outreach	11	3	65,475.00	14,600.93	Local/Federal	Reg	2/20/2018
Vacant	Social Worker	Home and Community Based Support	12	0	82,326.00	18,358.70	Local/Federal	Vacant	n/a
Williams,Richard Louis	Creative Comm. & Graphics Spec	Consumer Info., Assistance and Outreach	12	2	78,487.00	17,502.60	Local/Federal	Reg	3/17/2019
Jefferson,Katrice L	Customer Service Specialist	Home and Community Based Support	12	1	76,126.00	16,976.10	Local/Federal	Reg	5/11/2015
Delespin,Aurora L	Deputy Director	Agency Management Services	16	0	159,395.98	35,545.30	Local/Federal	Reg	12/6/2004
washington,rinaldo B	Special Projects Coordinator	Agency Management Services	13	5	98,947.00	22,065.18	Local/Federal	Reg	3/4/2019
Vacant	Management Analyst	Agency Management Services	13	0	87,703.00	19,557.77	Local/Federal	Vacant	n/a
Watson-Brooks,Karen Y.	Social Worker	Home and Community Based Support	11	10	92,195.00	20,559.49	Local	Reg	10/27/2019
Reyes-Negron,Karen	Social Worker	Home and Community Based Support	12	4	89,997.00	20,069.33	Local	Reg	10/27/2019
Reed,Kevin D.	Social Worker	Home and Community Based Support	11	2	75,091.00	16,745.29	Local	Reg	11/24/2019
Smith,Teresa Belinda	Social Worker	Home and Community Based Support	12	10	105,339.00	23,490.60	Local	Reg	10/27/2019
Luster,Joann	Social Worker	Home and Community Based Support	11	10	92,195.00	20,559.49	Local	Reg	10/27/2019
Johnson,Sammie	Social Worker	Home and Community Based Support	11	5	81,505.00	18,175.62	Local	Reg	10/27/2019
Carter,Melvin	Social Services Assistant	Home and Community Based Support	8	10	64,607.00	14,407.36	Local	Reg	10/27/2019
Floyd,Cecily Williams	Social Worker	Home and Community Based Support	11	5	81,505.00	18,175.62	Local	Reg	10/27/2019
Silva,Sierra	Social Worker	Home and Community Based Support	11	2	75,091.00	16,745.29	Local	Reg	10/27/2019
Vacant	Social Worker	Home and Community Based Support	12	0	82,326.00	18,358.70	Local	Vacant	n/a
Frazier,Michelle K	Program Manager	Home and Community Based Support	14	0	129,411.00	28,858.65	Intra-District Local	Reg	10/27/2019
Meyers,Leslie Ross	Social Worker	Home and Community Based Support	11	6	83,643.00	18,652.39	Intra-District Local	Reg	10/27/2019
Inge,Carmen	Social Services Assistant	Home and Community Based Support	8	5	56,607.00	12,623.36	Intra-District Local	Reg	10/27/2019
Cacho Sr.,Andrew C	Social Worker	Home and Community Based Support	11	4	79,367.00	17,698.84	Intra-District Local	Reg	10/27/2019
Baktash,Sina	Supervisory Social Worker	Home and Community Based Support	13	0	104,201.88	23,237.02	Intra-District Local	Reg	10/27/2019
BYRD,DAMON	Social Worker	Home and Community Based Support	11	10	92,195.00	20,559.49	Intra-District Local	Reg	10/27/2019
Craig,Clarence F	Supervisory Social Worker	Home and Community Based Support	13	0	115,861.99	25,837.22	Intra-District Local	Reg	10/27/2019
Brewer,Barbara Jane	Social Worker	Home and Community Based Support	12	8	100,225.00	22,350.18	Intra-District Local	Reg	10/27/2019
Ndichu,Eric W.	Social Worker	Home and Community Based Support	12	4	89,997.00	20,069.33	Intra-District Local	Reg	10/27/2019
Oloughlin,Charlayne Letitia	Social Worker	Home and Community Based Support	12	8	100,225.00	22,350.18	Intra-District Local	Reg	10/27/2019
Chase,Darrell	Program Analyst	Home and Community Based Support	12	3	87,440.00	19,499.12	Intra-District Local	Reg	10/27/2019
Akinkuowo,Eniola O	Social Worker	Home and Community Based Support	12	10	105,339.00	23,490.60	Intra-District Local	Reg	10/27/2019
Jerrels,Alesia	Supervisory Social Worker	Home and Community Based Support	13	0	113,000.00	25,199.00	Intra-District Local	Reg	1/21/2020
Richardson-Dalzell,Elaine	Supervisory Social Worker	Home and Community Based Support	13	0	115,000.00	25,645.00	Local/Federal	Reg	1/21/2020
Vacant	Social Worker	Home and Community Based Support	12	0	82,326.00	18,358.70	Local/Federal	Vacant	n/a
Barrera-Mercado,Cristian E.	Deputy Chief of Staff	Agency Management Services	14	0	129,411.26	28,858.71	Local/Federal	Reg	12/28/2014
Wallace,Orisia	Social Worker	Home and Community Based Support	12	5	85,570.00	19,082.11	Local/Federal	Term	1/7/2019

<b>Information Technology Equipment Inventory</b>			
<b>NAME</b>	<b>LAPTOP</b>	<b>CELLPHONE</b>	<b>TABLET</b>
Adam Mingal	Y	Y	
Angela Fields	Y	Y	
Antonette Dozier		Y	
Aurora Delespin-Jones	Y	Y	
Aweke Wudineh	Y	Y	
Brie' Asha Nwanze	Y	Y	
Charlotte Morgan	Y	Y	
Cheryl Smith	Y	Y	
Chris Deyoung	Y	Y	
Christian Barrera	Y	Y	
Darlene Nowlin	Y	Y	
Ekundayo Akinola	Y	Y	
Emma Baxter	Y	Y	
Eric Manuel	Y	Y	
Garret King	Y	Y	
Gwen Noonan-Jones	Y	Y	
Heather Stowe	Y	Y	
Jemila Darku	Y	Y	
Joel Lucas	Y	Y	
Karen Dorbin	Y	Y	
Katrice Jefferson	Y	Y	
Lakeisha Morton	Y	Y	
Laura Newland	Y	Y	
Margaret Woods	Y	Y	
Mark Bjorge	Y	Y	
Melanie Gilliam	Y	Y	
Melishe Ivey	Y	Y	
Natasha Webb	Y	Y	
Nigel John		Y	
Nkwenti Sanga	Y	Y	
Orisia Wallace	Y	Y	
Phillip Meadows	Y	Y	
Plathon Watson	Y	Y	
Ramona Butler	Y	Y	
Regat Hagos	Y	Y	
Richard Williams	Y	Y	
Rinaldo Washington	Y	Y	
Robert Russell	Y	Y	
Rolanda Wray	Y	Y	
Sadia Ferguson	Y	Y	
Samuel Taylor		Y	

Shatina Euell	Y	Y	
Tamara Moore	Y	Y	
Tanya Reid	Y	Y	
Vanessa Hicks		Y	Y
Yolanda Lyles	Y	Y	

**Attachment Q4b - Vehicles List**

<b>Vehicle Tag</b>	<b>Vin#</b>	<b>Year</b>	<b>Description</b>		<b>Assignment</b>	<b>Accident</b>
DC11997	5TDDZ3DC3JS195359	2018	Toyota Sienna	leased	All Staff	The driver's side mirror was damaged while the vehicle was parked on 5th St.
DC10252	19XFB4F28DE200903	2013	Hybrid Honda Civic	Own	All Staff	
DC8835	19XFB2F54EE237429	2014	Honda Civic	Own	All Staff	
DC8113	2C7WDGBG7ER380102	2014	Dodge Caravan	Own	EAC/ Staff	
DC8110	2C7WDGBG8ER380125	2014	Dodge Caravan	Own	Medicaid Staff	
DC8111	2C7WDGBG4ER380106	2014	Dodge Caravan	Own	Medicaid Staff	
DC8112	2C7WDGBG9ER380098	2014	Dodge Caravan	Own	APS/Staff	
DC8834	19XFB2F60EE238478	2014	Honda Civic	Own	APS/ Staff	

<b>Returned/Disposed</b>	<b>Vin#</b>	<b>Year</b>	<b>Description</b>		<b>Assignment</b>	<b>Accident</b>
DC9056	1FM2U72K53UC53987	2003	SUV Ford Explorer	Own	Disposed	

**Attachment Q4c. - Travel Expenses**

<b>FY19 Travel Expenses</b>					
<b>Name of Employees</b>	<b>Position Title</b>	<b>Dates of Travel or Training</b>	<b>Location</b>	<b>Reason for Travel</b>	<b>Expenses*</b>
Adam Mingal	General Counsel	4/14/2019 through 4/19/2019	New Orleans, LA	Society on Aging Conference	\$2,721.80
Aurora Delespin-Jones	Deputy Director	4/30/2019 through 5/3/2019	Atlanta, GA	ACL, Regions III & IV Meeting	\$1,588.84
Cheryl Smith	Program Analyst	7/21/2019 through 7/24/2019	San Diego, CA	SMP/SHIP National Conference	\$1,453.86
Christian Barrera	Deputy Chief of Staff	7/27/2019 through 7/31/2019	New Orleans, LA	n4a Conference and Tradeshow	\$2,102.87
Darlene Nowlin	Community Relations Specialist	10/14/2018 through 10/19/2018	Atlantic City, NJ	Senior America Pageant	\$1,400.00
Eric Manuel	Program Manager	7/27/2019 through 7/31/2019	New Orleans, LA	n4a Conference and Tradeshow	\$1,871.66
Garret King	Chief of Staff	4/30/2019 through 5/3/2019	Atlanta, GA	ACL, Regions III & IV Meeting	\$1,604.47
Karen Dorbin	Director of Communications	3/25/2019 through 3/26/2019	Brooklyn, NY	Service Design Immersive Conference	\$2,660.53
Karen Dorbin	Director of Communications	7/27/2019 through 7/31/2019	New Orleans, LA	n4a Conference and Tradeshow	\$2,196.99
Laura Newland	Director	3/25/2019 through 3/26/2019	Brooklyn, NY	Service Design Immersive Conference	\$2,592.01
Melishe Ivey	Volunteer Coordinator	7/22/2019 through 7/25/2019	San Diego, CA	SMP/SHIP National Conference	\$1,810.48
Nia Pride	Customer Service Communications Specialist	6/2/2019 through 6/5/2019	Atlanta, GA	AIRS Training and Education Conference	\$1,374.53
Sara Tribe Clark	Associate Director	7/29/2019 through 7/31/2019	Philadelphia, PA	CMS Medicare Training - State Health Insurance Program	\$758.42
Sheila Harley	Customer Service Communications Specialist	6/2/2019 through 6/5/2019	Atlanta, GA	AIRS Training and Education Conference	\$1,424.60
Tamara Moore	Information & Referral Assistance, Supervisor	6/2/2019 through 6/5/2019	Atlanta, GA	AIRS Training and Education Conference	\$905.05
Tamara Moore	Information & Referral Assistance, Supervisor	7/21/2019 through 7/25/2019	San Diego, CA	SMP/SHIP National Conference	\$1,591.16
Yolanda Lyles	Chief Information Officer	9/8/2019 through 9/11/2019	Kansas City, MO	CareForum 2019	\$770.59

<b>FY20 Travel Expenses (YTD)</b>					
<b>Name of Employees</b>	<b>Position Title</b>	<b>Dates of Travel or Training</b>	<b>Location</b>	<b>Reason for Travel</b>	<b>Expenses</b>
Darlene Nowlin	Community Relations Specialist	10/20/2019 through 10/25/2019	Atlantic City, NJ	Senior America Pageant	\$1,550.00

\*Includes Conference/Training Fees

**Attachment Q6 - Intra**

<b>Intra-District Transfers - From Other Agencies</b>				
	<b>FY19 Amount</b>	<b>Agency</b>	<b>Date Entered</b>	<b>Duration of Transfer</b>
	\$ 100,000.00	DHCF	12/19/2018	FY19
	\$ 128,958.00	DDS	1/25/2019	FY19
	\$ 172,000.00	DHCF	10/15/2018	FY19
<b>TOTAL</b>	<b>\$ 400,958.00</b>			
<b>Intra-District Transfers - To Other Agencies</b>				
	\$ 143,712.00	OFRM	12/11/2018	FY19
	\$ 66,000.00	OFRM	12/4/2018	FY19
	\$ 59,143.86	DPW	N/A (Citywide)	FY19
	\$ 53,182.75	OUC	N/A (Citywide)	FY19
	\$ 148,272.39	OCTO	N/A (Citywide)	FY19
	\$ 144,645.17	OCTO	N/A (Citywide)	FY19
	\$ 32,768.20	Events DC	12/4/2018	FY19
	\$ 410,000.00	DOH	6/12/2019	FY19
	\$ 6,000.00	UDC	3/27/2019	FY19
<b>TOTAL</b>	<b>\$ 1,063,724.37</b>			



**District Transfers in FY19**

<b>Project Descriptions</b>
Long-Term Ombudsman Program
Independent Living Services for Deaf and Blind Seniors
Money Follows the Person - MFPDP1
OFRM Financial Services
Random Moment Time Study for Medicaid billing
Fleet Management
OUC - Communications
Citywide Telecommunications: Telephones (Landlines, mobile bills)
Hardware Servers
Mayor's Holiday Celebration
Commodity Supplemental Program
Ms. Senior DC Pageant

### Attachment Q8: Purchase Card Spending FY2019

Employee	Post Date	Merchant Name	Transaction Amount	Purpose of Expenditure
ANTONETTE DOZIER	10/15/2018	SQ *SQ *ROBERT CATHCAR	\$ 300.00	Transport for travel to Ms. Senior America Pageant
ANTONETTE DOZIER	10/15/2018	PAYPAL	\$ 80.00	Event ticket for travel to Ms. Senior America Pageant
ANTONETTE DOZIER	10/15/2018	SQU*SQ *KRAKEN REPAIR	\$ 657.00	Hotel and Pageant tickets for Ms. Senior America Pageant
ANTONETTE DOZIER	10/15/2018	CHAMPION AWARDS	\$ 164.75	Certificate and trophy plaque 2018 Brain Games
TANYA REID	10/15/2018	ACADEMY - FNCE	\$ 785.00	Registration fee for Food and Nutrition Conference and Expo
TANYA REID	10/18/2018	TURNING TECHNOLOGIES	\$ 1,000.00	IT license renewal
TANYA REID	10/23/2018	PAYPAL	\$ 386.18	Senior MedExpress Logo
TANYA REID	10/23/2018	TCS INTERPRETING	\$ 172.38	Sign language interpretation
ANTONETTE DOZIER	11/01/2018	GG TAUBER, LLC	\$ 19.41	Brain Games replacement medal
TANYA REID	11/02/2018	AND DESIGN INC	\$ 2,195.00	De-branding of vehicles
TANYA REID	11/12/2018	B&H PHOTO 800-606-696	\$ 1,799.00	Laptops for agency
TANYA REID	11/19/2018	FEDEX	\$ 33.55	FedEx Letters
TANYA REID	11/21/2018	AMZN MKTP US	\$ 58.94	IT supplies for agency
TANYA REID	11/21/2018	AMZN MKTP US	\$ 2,976.73	IT supplies for agency
ANTONETTE DOZIER	11/28/2018	INT*IN *AD BOX PROMO A	\$ 2,337.40	Supplies for agency
ANTONETTE DOZIER	12/03/2018	STAPLS3146320359000	\$ 19.99	Parking access for Senior Holiday party
ANTONETTE DOZIER	12/06/2018	SQU*SQ *WOOTEN APPLIAN	\$ 492.95	Facility maintenance/repair for Bernice Wellness Center
ANTONETTE DOZIER	12/10/2018	STANDARD OFFICE SUPPLY	\$ 3,137.97	Office supplies for agency
ANTONETTE DOZIER	12/10/2018	STANDARD OFFICE SUPPLY	\$ 3,247.80	Office supplies for agency
TANYA REID	12/10/2018	ALLIANCE OF INFORMATIO	\$ 560.00	AIRS certification membership renewal
TANYA REID	12/10/2018	AMAZON.COM*M021H4KLO	\$ 249.58	Supplies for Mayor's Senior Holiday Celebration
TANYA REID	12/10/2018	STANDARD OFFICE SUPPLY	\$ 138.04	Supplies for Savvy Caregiver
TANYA REID	12/12/2018	AMZN MKTP US	\$ 746.37	IT supplies for agency
ANTONETTE DOZIER	12/13/2018	STANDARD OFFICE SUPPLY	\$ 103.00	Office supplies for agency
ANTONETTE DOZIER	12/18/2018	THE R MARTIN GROUP LLC	\$ 2,000.00	Photographer and support for Mayor's Senior Holiday Celebration
TANYA REID	12/18/2018	MULTICULTURAL COMMUNIT	\$ 420.00	Language interpreters for Community Resource and Health Fair
TANYA REID	12/21/2018	SENODA INC	\$ 3,855.00	Programs for Mayor's Senior Holiday Celebration
ANTONETTE DOZIER	01/07/2019	STANDARD OFFICE SUPPLY	\$ 114.95	Office supplies for agency
TANYA REID	01/10/2019	SENODA INC	\$ 2,110.00	Tickets and postcards for Mayor's Senior Holiday Celebration
TANYA REID	01/18/2019	STANDARD OFFICE SUPPLY	\$ 671.42	Office supplies for agency
TANYA REID	01/18/2019	STANDARD OFFICE SUPPLY	\$ 899.22	Supplies for Cupid's Kids event
ANTONETTE DOZIER	01/21/2019	STANDARD OFFICE SUPPLY	\$ 651.79	Office supplies for agency
ANTONETTE DOZIER	01/21/2019	STANDARD OFFICE SUPPLY	\$ 1,064.54	Office supplies for agency
ANTONETTE DOZIER	01/21/2019	STANDARD OFFICE SUPPLY	\$ 646.27	Office supplies for agency
TANYA REID	01/21/2019	STANDARD OFFICE SUPPLY	\$ 46.20	Office supplies for agency
ANTONETTE DOZIER	01/22/2019	STANDARD OFFICE SUPPLY	\$ 124.95	Office supplies for agency
ANTONETTE DOZIER	01/25/2019	DRI*FLICKR	\$ 52.99	Annual subscription renewal for online photo storage
TANYA REID	01/30/2019	AMZN MKTP US	\$ 47.97	Supplies for Cupid's Kids event
ANTONETTE DOZIER	02/01/2019	THE R MARTIN GROUP LLC	\$ 600.00	Professional services for Mayor's Senior Holiday Celebration

TANYA REID	02/07/2019	UNITED AIRLINES	\$	371.60	Airfare for travel to the Society on Aging conference
TANYA REID	02/07/2019	AM SOCIETY AGING	\$	835.00	Society on Aging conference registration fee
TANYA REID	02/08/2019	AMZN MKTP US	\$	79.98	Office supplies for agency
TANYA REID	02/11/2019	AMZN MKTP US	\$	36.25	Training material for agency
TANYA REID	02/11/2019	INT*IN *ACSI TRANSLATI	\$	960.00	American Sign Language interpreter for Mayor's Senior Holiday Celebration
TANYA REID	02/11/2019	AMAZON.COM*MI9FE3Z50	\$	31.71	Training material for agency
ANTONETTE DOZIER	02/28/2019	MEALS ON WHEELS AMERIC	\$	300.00	Meals on Wheels America annual dues
TANYA REID	02/28/2019	SENODA INC	\$	222.50	Information cards for HIICAP
TANYA REID	03/04/2019	HEALTHCARE CONF LLC	\$	295.00	HIPAA conference registration fee
TANYA REID	03/06/2019	WASHPOST	\$	3,607.36	Advertisement in Washington Post (RFA Publication)
ANTONETTE DOZIER	03/07/2019	MVS INC	\$	3,872.00	Software for agency
ANTONETTE DOZIER	03/08/2019	STANDARD OFFICE SUPPLY	\$	3,914.50	Office supplies for agency
TANYA REID	03/12/2019	PAYPAL	\$	1,200.00	Software for agency
TANYA REID	03/12/2019	MEDICARE RIGHTS CENTER	\$	300.00	Training material for agency
ANTONETTE DOZIER	03/15/2019	STANDARD OFFICE SUPPLY	\$	253.55	Office supplies for agency
ANTONETTE DOZIER	03/18/2019	AMZN MKTP US	\$	449.90	IT supplies for agency
ANTONETTE DOZIER	03/18/2019	AMZN MKTP US	\$	476.99	IT supplies for agency
ANTONETTE DOZIER	03/18/2019	AMZN MKTP US	\$	11.30	IT supplies for agency
ANTONETTE DOZIER	03/18/2019	AMZN MKTP US	\$	444.50	IT supplies for agency
ANTONETTE DOZIER	03/18/2019	AMTRAK .CO07	\$	300.00	Train ticket for travel to the Service Design Immersive conference
TANYA REID	03/18/2019	EB COOPER SERVICE DES	\$	3,723.90	Service Design Immersive conference registration fee
TANYA REID	03/18/2019	AMTRAK .CO07	\$	96.00	Train ticket for travel to the Service Design Immersive conference
TANYA REID	03/18/2019	AMERICAN AIRLINES	\$	338.31	Airfare for travel to the Service Design Immersive conference
ANTONETTE DOZIER	03/20/2019	AMZN MKTP US	\$	1,172.31	IT supplies for agency
TANYA REID	03/20/2019	MULTICULTURAL COMMUNIT	\$	420.00	Language interpreters for Health Fair
TANYA REID	03/22/2019	STAPLES DIRECT	\$	105.89	Agency business cards
TANYA REID	03/28/2019	TILLARY HOTEL	\$	270.92	Lodging for the Service Design Immersive conference
TANYA REID	03/28/2019	TILLARY HOTEL	\$	270.92	Lodging for the Service Design Immersive conference
ANTONETTE DOZIER	03/29/2019	AMZN MKTP US	\$	454.00	Camera equipment for agency outreach events
ANTONETTE DOZIER	04/01/2019	AMZN MKTP US	\$	29.75	Pride flags for Senior Wellness Centers
ANTONETTE DOZIER	04/01/2019	AMZN MKTP US	\$	609.06	Camera equipment for agency outreach events
ANTONETTE DOZIER	04/01/2019	STANDARD OFFICE SUPPLY	\$	4,191.82	Office supplies for agency
TANYA REID	04/01/2019	SOUTHWEST	\$	302.96	Airfare for travel to the ACL Regions conference
TANYA REID	04/01/2019	OMNI HOTELS	\$	988.88	Lodging for the ACL Regions conference
TANYA REID	04/01/2019	OMNI HOTELS	\$	988.88	Lodging for the ACL Regions conference
TANYA REID	04/04/2019	AMERICAN AIRLINES	\$	318.59	Airfare for travel to the ACL Regions conference
TANYA REID	04/05/2019	AMZN MKTP US	\$	55.91	IT supplies for agency
ANTONETTE DOZIER	04/08/2019	STANDARD OFFICE SUPPLY	\$	573.69	Office supplies for agency
ANTONETTE DOZIER	04/11/2019	AMZN MKTP US	\$	139.15	Pride flags for Senior Wellness Centers
ANTONETTE DOZIER	04/12/2019	PAYPAL	\$	1,543.80	Grant proposals reviewer consultant
ANTONETTE DOZIER	04/12/2019	PAYPAL	\$	1,543.80	Grant proposals reviewer consultant
ANTONETTE DOZIER	04/12/2019	PAYPAL	\$	1,543.80	Grant proposals reviewer consultant

TANYA REID	04/12/2019	SHRED-IT USA LLC	\$	1,243.23	Agency paper shredding
ANTONETTE DOZIER	04/18/2019	MULTICULTURAL COMMUNIT	\$	2,030.00	Language interpreters for the budget town hall meeting
ANTONETTE DOZIER	04/19/2019	CAPITAL PRIDE ALLIANCE	\$	1,405.00	Fee for Pride Parade and Festival
ANTONETTE DOZIER	04/22/2019	STANDARD OFFICE SUPPLY	\$	404.30	Office supplies for agency
TANYA REID	04/22/2019	MVS INC	\$	436.51	Software for agency
TANYA REID	04/22/2019	HYATT REGENCY NEW ORLE	\$	975.08	Lodging for Society on Aging conference
TANYA REID	04/22/2019	AMAZON.COM*MZ3I99PK0 A	\$	42.39	Camera equipment for agency outreach events
TANYA REID	04/23/2019	REI*PAYMENT CENTER	\$	640.28	Software for agency
TANYA REID	04/24/2019	DELTA	\$	196.60	Airfare for AIRS conference
TANYA REID	04/24/2019	DELTA	\$	196.60	Airfare for AIRS conference
TANYA REID	04/24/2019	DELTA	\$	196.60	Airfare for AIRS conference
ANTONETTE DOZIER	04/25/2019	CENTER FOR MEDICARE AD	\$	225.00	Access to Healthcare Conference registration fee
ANTONETTE DOZIER	04/25/2019	MULTICULTURAL COMMUNIT	\$	1,138.28	Translators for budget townhall
ANTONETTE DOZIER	04/26/2019	GG TAUBER, LLC	\$	1,813.05	Medallion for Centenarian event
ANTONETTE DOZIER	04/29/2019	STANDARD OFFICE SUPPLY	\$	1,510.85	Office supplies for agency
TANYA REID	04/29/2019	STANDARD OFFICE SUPPLY	\$	211.00	Supplies for Centenarian event
TANYA REID	04/29/2019	AMZN MKTP US	\$	112.24	IT supplies for agency
ANTONETTE DOZIER	04/30/2019	PRINCE HALL FREEMASON	\$	1,100.00	Facility space rental for budget townhall event
TANYA REID	04/30/2019	INT*IN *ACSI TRANSLATI	\$	480.00	American Sign Language interpreters for budget townhall event
TANYA REID	04/30/2019	OTT TOURS OF WASHING	\$	1,480.00	Trolley rental for Pride Parade
ANTONETTE DOZIER	05/01/2019	AMZN MKTP US	\$	42.35	IT supplies for agency
TANYA REID	05/02/2019	PAYPAL	\$	720.60	Professional services for Centenarian event
TANYA REID	05/03/2019	ALLIANCE OF INFORMATIO	\$	1,380.00	AIRS conference registration fee
ANTONETTE DOZIER	05/06/2019	AMZN MKTP US	\$	1,272.26	IT supplies for agency
TANYA REID	05/06/2019	PAYPAL	\$	450.00	Photographer for Centenarian event
TANYA REID	05/06/2019	DC BAR	\$	317.00	Bar membership dues
ANTONETTE DOZIER	05/07/2019	PAYPAL	\$	1,625.00	Senior America Inc. state membership and affiliation fee
ANTONETTE DOZIER	05/09/2019	STANDARD OFFICE SUPPLY	\$	540.52	Office supplies for agency
TANYA REID	05/09/2019	INT*IN *CARROLL H HYNS	\$	200.00	Staging for Centenarian
TANYA REID	05/09/2019	INT*IN *ALLIANCE OF IN	\$	81.00	AIRS certification exam fee
TANYA REID	05/10/2019	THE R MARTIN GROUP LLC	\$	1,580.00	Audio equipment for budget townhall event
TANYA REID	05/13/2019	PAYPAL	\$	360.45	Professional services for Centenarian event
ANTONETTE DOZIER	05/14/2019	DIPLOMAFRAME CHC	\$	286.15	Supplies for Centenarian event
TANYA REID	05/14/2019	PAYPAL	\$	411.90	Professional services for Centenarian event
ANTONETTE DOZIER	05/15/2019	METROPOLITAN OFFICE PR	\$	4,608.95	Office supplies for agency
ANTONETTE DOZIER	05/16/2019	STANDARD OFFICE SUPPLY	\$	419.65	Office supplies for agency
ANTONETTE DOZIER	05/20/2019	CKO*WWW.ISTOCKPHOTO.C	\$	2,650.00	Subscription renewal for images and graphics
ANTONETTE DOZIER	05/20/2019	AMZN MKTP US	\$	102.22	Office supplies for agency
TANYA REID	05/20/2019	SENODA INC	\$	4,920.00	Graphics and invitation printouts for Centenarian event
ANTONETTE DOZIER	05/23/2019	STANDARD OFFICE SUPPLY	\$	4,632.66	Furniture for agency
ANTONETTE DOZIER	05/30/2019	AMZN MKTP US	\$	1,572.08	Equipment and supplies for Senior Symposium
ANTONETTE DOZIER	05/31/2019	FLIK GALLCONF 16128290	\$	2,000.00	Facility space for Centenarian salute

ANTONETTE DOZIER	06/03/2019	FLIK GALLCONF 16128290	\$	1,821.00	Facility space for Centenarian salute
TANYA REID	06/05/2019	STANDARD OFFICE SUPPLY	\$	4,089.59	Office supplies for agency
TANYA REID	06/05/2019	PAYPAL	\$	2,058.30	Training fee for Social Workers
ANTONETTE DOZIER	06/06/2019	SENODA INC	\$	270.00	Banner for Pride Parade
ANTONETTE DOZIER	06/06/2019	PAYPAL	\$	2,592.13	Facility rental fees for Mayor's Older American Breakfast event
ANTONETTE DOZIER	06/06/2019	PAYPAL	\$	1,235.10	Grant proposals reviewer consultant
ANTONETTE DOZIER	06/06/2019	PAYPAL	\$	1,235.10	Grant proposals reviewer consultant
TANYA REID	06/06/2019	UNIVERSITY OF THE DIST	\$	1,580.00	Facility rental for Brains Games
ANTONETTE DOZIER	06/07/2019	PAYPAL	\$	309.00	Professional services for Senior Symposium
TANYA REID	06/07/2019	MARRIOTT ATLANTA MARQU	\$	456.00	Lodging for AIRS conference
TANYA REID	06/07/2019	MARRIOTT ATLANTA MARQU	\$	456.00	Lodging for AIRS conference
ANTONETTE DOZIER	06/10/2019	LUNAR MASSAGE WASHINGT	\$	1,275.00	Professional services for Senior Symposium
TANYA REID	06/10/2019	PAYPAL	\$	875.00	Art therapy workshop for Senior Symposium
TANYA REID	06/11/2019	MULTICULTURAL COMMUNIT	\$	1,136.40	Translators and interpreters for Mayor's Older American Breakfast event
TANYA REID	06/12/2019	INT*IN *GOTTA GO NOW	\$	1,227.74	Portable toilets for Senior Fest
TANYA REID	06/12/2019	CHAMPION AWARDS	\$	751.25	Trophies and awards for Ms. Senior D.C. Pageant
ANTONETTE DOZIER	06/13/2019	AMZN MKTP US	\$	455.00	Camera equipment for agency outreach events
TANYA REID	06/13/2019	SOUTHWEST	\$	534.00	Airfare for SHIP conference
TANYA REID	06/13/2019	DC BAR	\$	417.00	Bar membership dues
ANTONETTE DOZIER	06/14/2019	BAGMASTERS	\$	4,900.00	Branded outreach bags for Senior Symposium
TANYA REID	06/14/2019	SOUTHWEST	\$	696.50	Airfare for SHIP conference
TANYA REID	06/14/2019	4IMPRINT	\$	2,858.74	Branded pens and notepads for Senior Symposium
ANTONETTE DOZIER	06/17/2019	WASHINGTON PERFORMING	\$	890.00	Professional services for Senior Symposium
ANTONETTE DOZIER	06/17/2019	STANDARD OFFICE SUPPLY	\$	279.03	Supplies for Ms. Senior D.C. Pageant
TANYA REID	06/17/2019	WESTIN (WESTIN HOTELS)	\$	588.66	Lodging for SHIP Conference
TANYA REID	06/17/2019	WESTIN (WESTIN HOTELS)	\$	784.88	Lodging for SHIP Conference
TANYA REID	06/17/2019	NATIONAL ASSOCIATION OF	\$	1,620.00	n4a conference registration fee
ANTONETTE DOZIER	06/19/2019	STANDARD OFFICE SUPPLY	\$	1,133.24	Office supplies for agency
ANTONETTE DOZIER	06/20/2019	STANDARD OFFICE SUPPLY	\$	63.58	Office supplies for agency
ANTONETTE DOZIER	06/24/2019	PAYPAL	\$	617.70	Professional Service for Senior Symposium
ANTONETTE DOZIER	06/27/2019	SOUTHWEST	\$	683.00	Airfare for SHIP conference
ANTONETTE DOZIER	06/27/2019	PAYPAL	\$	700.00	Photo booth for Senior Symposium
ANTONETTE DOZIER	07/01/2019	SENODA INC	\$	658.00	Supplies for Pride Parade
TANYA REID	07/01/2019	NATIONAL ASSOC OF STAT	\$	625.00	HCBS conference registration
TANYA REID	07/01/2019	NATIONAL ASSOC OF STAT	\$	625.00	HCBS conference registration
TANYA REID	07/01/2019	NATIONAL ASSOC OF STAT	\$	625.00	HCBS conference registration
TANYA REID	07/01/2019	NATIONAL ASSOC OF STAT	\$	625.00	HCBS conference registration
TANYA REID	07/01/2019	BAGMASTERS	\$	1,690.82	Additional branded outreach bags for Senior Symposium
ANTONETTE DOZIER	07/02/2019	PAYPAL	\$	3,080.00	Professional Services and branded outreach materials for the Pride Festival
TANYA REID	07/02/2019	MULTICULTURAL COMMUNIT	\$	770.00	Language interpreters for Senior Town Talk
TANYA REID	07/03/2019	AMERICAN AIRLINES	\$	426.61	Airfare for n4a Conference
TANYA REID	07/03/2019	AMERICAN AIRLINES	\$	426.61	Airfare for n4a Conference

ANTONETTE DOZIER	07/04/2019	PAYPAL	\$	2,268.70	Professional Services and branded outreach materials for the Pride Parade
ANTONETTE DOZIER	07/04/2019	PAYPAL	\$	1,543.80	Professional services for Senior Symposium
TANYA REID	07/04/2019	SENODA INC	\$	2,247.00	Signage for Senior Symposium
TANYA REID	07/04/2019	SOUTHWEST	\$	263.96	Airfare for n4a conference
ANTONETTE DOZIER	07/10/2019	RESCUE ONE TRAINING FO	\$	368.16	Facility service/maintenance for Senior Wellness Center
ANTONETTE DOZIER	07/10/2019	RESCUE ONE TRAINING FO	\$	1,500.00	Facility service/maintenance for Senior Wellness Center
TANYA REID	07/11/2019	THE R MARTIN GROUP LLC	\$	4,995.00	Audio services for Ms. Senior D.C. Pageant
ANTONETTE DOZIER	07/12/2019	INT*IN *ACSI TRANSLATI	\$	3,360.00	ASL interpreters for Ms. Senior D.C. Pageant
ANTONETTE DOZIER	07/15/2019	SQ *SQ *ALIMAYU DESIGN	\$	700.00	Printouts for Ms. Senior D.C. Pageant
TANYA REID	07/16/2019	PAYPAL	\$	4,283.41	Professional services for Senior Symposium
TANYA REID	07/18/2019	GRANTWRITIN	\$	455.00	Training material for agency
TANYA REID	07/19/2019	NATIONAL ASSOC OF STAT	\$	725.00	HCBS conference registration
ANTONETTE DOZIER	07/23/2019	PAYPAL	\$	92.52	Professional services for Senior Symposium
ANTONETTE DOZIER	07/23/2019	AMZN MKTP US	\$	194.31	Office supplies for agency
TANYA REID	07/23/2019	PAYPAL	\$	700.00	Cleaning services for Senior Symposium
ANTONETTE DOZIER	07/24/2019	AMZN MKTP US	\$	868.35	Office supplies for agency
ANTONETTE DOZIER	07/24/2019	AMZN MKTP US	\$	37.95	Office supplies for agency
ANTONETTE DOZIER	07/24/2019	AMZN MKTP US	\$	122.59	Office supplies for agency
ANTONETTE DOZIER	07/25/2019	STANDARD OFFICE SUPPLY	\$	1,111.58	Office supplies for agency
ANTONETTE DOZIER	07/25/2019	AMAZON.COM*MH6BD0ID0 A	\$	722.07	Office supplies for agency
TANYA REID	07/25/2019	THE MERCANTILE HOTEL	\$	333.93	Lodging for n4a conference
ANTONETTE DOZIER	07/26/2019	CUSTOMUSB.COM	\$	633.69	Branded outreach material for n4a conference
ANTONETTE DOZIER	07/29/2019	PAYPAL	\$	103.20	Fee for social work training
ANTONETTE DOZIER	07/29/2019	AMTRAK .CO20	\$	209.00	Train ticket for travel to SHIP conference
DARLENE NOWLIN	08/01/2019	HSTREETMAIN	\$	680.00	Registration fee for H Street outreach event
DARLENE NOWLIN	08/01/2019	INT*IN *AD BOX PROMO A	\$	615.92	Supplies for Ms. Senior D.C. Pageant
ANTONETTE DOZIER	08/01/2019	HOTEL INTRCNTNNTAL NEW ORLEANS	\$	816.76	Lodging for n4a conference
ANTONETTE DOZIER	08/01/2019	HOTEL INTRCNTNNTAL NEW ORLEANS	\$	816.76	Lodging for n4a conference
ANTONETTE DOZIER	08/01/2019	THE MERCANTILE HOTEL	\$	748.20	Lodging for n4a conference
DARLENE NOWLIN	08/02/2019	SENODA INC	\$	5,000.00	Program booklets for Ms. Senior D.C. Pageant
DARLENE NOWLIN	08/02/2019	PHILADELPHIA 201 HOTEL	\$	428.22	Lodging for SHIP conference
DARLENE NOWLIN	08/02/2019	HOLLYWOOD EAST STUDIO	\$	1,600.00	Video services for Ms. Senior D.C. Pageant
ANTONETTE DOZIER	08/05/2019	PAYPAL	\$	100.00	CEU fee for NABSW
ANTONETTE DOZIER	08/05/2019	PAYPAL	\$	4,013.40	Training fee for Social Workers
ANTONETTE DOZIER	08/05/2019	CHAMPION AWARDS	\$	250.00	Medallions for Brain Games
ANTONETTE DOZIER	08/05/2019	VA DMV ONLINE BILLING	\$	65.00	Fee for DMV Virginia driver's records
ANTONETTE DOZIER	08/05/2019	AMZN MKTP US	\$	2,753.60	IT supplies for agency
TANYA REID	08/07/2019	AMZN MKTP US	\$	38.99	Office supplies for agency
TANYA REID	08/08/2019	AMZN MKTP US	\$	123.40	Supplies for Ms. Senior D.C. Pageant
TANYA REID	08/08/2019	EVENTSDC	\$	3,100.00	Facility space rental for all staff meeting
TANYA REID	08/09/2019	PAYPAL	\$	2,469.90	Facility maintenance for Hayes Senior Wellness Center
TANYA REID	08/12/2019	STANDARD OFFICE SUPPLY	\$	2,716.31	Office supplies for agency

ANTONETTE DOZIER	08/14/2019	SQUARE *SQ *SEND TOWIN	\$	225.00	Towing fee for agency vehicle
ANTONETTE DOZIER	08/14/2019	MULTICULTURAL COMMUNIT	\$	648.00	Language interpreters for outreach event
ANTONETTE DOZIER	08/14/2019	AMZN MKTP US	\$	239.68	Facility supplies for agency
ANTONETTE DOZIER	08/14/2019	AMZN MKTP US	\$	451.98	Facility supplies for agency
ANTONETTE DOZIER	08/15/2019	AMZN MKTP US	\$	11.99	Facility supplies for agency
ANTONETTE DOZIER	08/15/2019	AMZN MKTP US	\$	103.74	Facility supplies for agency
ANTONETTE DOZIER	08/15/2019	AMZN MKTP US	\$	158.45	Facility supplies for agency
ANTONETTE DOZIER	08/15/2019	AMZN MKTP US	\$	282.06	Facility supplies for agency
ANTONETTE DOZIER	08/16/2019	AMZN MKTP US	\$	216.48	Facility supplies for agency
ANTONETTE DOZIER	08/16/2019	AMZN MKTP US	\$	56.11	Facility supplies for agency
ANTONETTE DOZIER	08/16/2019	AMZN MKTP US	\$	1,521.16	Facility supplies for agency
ANTONETTE DOZIER	08/19/2019	AMZN MKTP US	\$	32.15	Facility supplies for agency
ANTONETTE DOZIER	08/20/2019	RESCUE ONE TRAINING FO	\$	242.40	Facility maintenance replaced expired electrode pads
ANTONETTE DOZIER	08/20/2019	PAYPAL	\$	1,000.00	Software for agency
ANTONETTE DOZIER	08/20/2019	INT*IN *THE HUMAN SERV	\$	400.00	Professional development material
ANTONETTE DOZIER	08/22/2019	AMAZON.COM*MO7Z831N2	\$	1,520.10	IT supplies for agency
ANTONETTE DOZIER	08/26/2019	ALLIANCE OF INFO & REF	\$	52.00	AIR certification fee
TANYA REID	08/26/2019	STANDARD OFFICE SUPPLY	\$	4,493.89	Office supplies for agency
TANYA REID	08/26/2019	STANDARD OFFICE SUPPLY	\$	370.98	Office supplies for agency
TANYA REID	08/28/2019	PAYPAL	\$	617.70	Facility service/maintenance for Senior Wellness Center
TANYA REID	08/29/2019	AMERICAN AIRLINES	\$	479.59	Airfare for Careforum conference
TANYA REID	08/30/2019	STANDARD OFFICE SUPPLY	\$	2,762.17	Office supplies for agency
TANYA REID	09/02/2019	MVS INC	\$	455.48	Software license renewal for agency
TANYA REID	09/02/2019	STANDARD OFFICE SUPPLY	\$	31.43	Office supplies for agency
TANYA REID	09/02/2019	AMZN MKTP US	\$	599.95	Facility maintenance for Senior Wellness Center
TANYA REID	09/04/2019	AMZN MKTP US	\$	59.99	Facility maintenance for Senior Wellness Center
ANTONETTE DOZIER	09/09/2019	AMAZON.COM*F530C5OW3	\$	629.00	Office supplies for agency
TANYA REID	09/09/2019	STANDARD OFFICE SUPPLY	\$	1,228.44	Furniture for agency
TANYA REID	09/11/2019	INT*IN *AD BOX PROMO A	\$	300.00	Staging for Ms. Senior D.C. Pageant
TANYA REID	09/12/2019	SENODA INC	\$	538.00	Agency rebranding signage
TANYA REID	09/12/2019	SHRED-IT USA LLC	\$	2,460.00	Agency paper shredding
ANTONETTE DOZIER	09/16/2019	THE HOME DEPOT #2583	\$	1,975.58	Appliance for agency
TANYA REID	09/16/2019	EVODESK	\$	1,515.60	Furniture for agency
TANYA REID	09/16/2019	NATIONAL CALL- ZMODO-D	\$	2,867.37	Facility maintenance/repair for Senior Wellness Center
ANTONETTE DOZIER	09/17/2019	AMAZON.COM*0M3II5T63	\$	89.87	Facility supplies for agency
TANYA REID	09/17/2019	AMZN MKTP US	\$	578.90	IT supplies for agency
TANYA REID	09/17/2019	AMZN MKTP US	\$	54.99	IT supplies for agency
ANTONETTE DOZIER	09/18/2019	STANDARD OFFICE SUPPLY	\$	2,436.88	Office supplies for agency
ANTONETTE DOZIER	09/18/2019	STANDARD OFFICE SUPPLY	\$	1,542.14	Office supplies for agency
ANTONETTE DOZIER	09/18/2019	HOMEDEPOT.COM	\$	973.41	Appliance for agency
ANTONETTE DOZIER	09/18/2019	MULTICULTURAL COMMUNIT	\$	864.00	Language interpreters for senior outreach event
TANYA REID	09/18/2019	MULTICULTURAL COMMUNIT	\$	4,272.00	Language interpreters for Senior Symposium

TANYA REID	09/18/2019	MULTICULTURAL COMMUNIT	\$	445.38	Outreach material translation
ANTONETTE DOZIER	09/19/2019	STANDARD OFFICE SUPPLY	\$	670.00	Agency furniture delivery/installation fee
ANTONETTE DOZIER	09/19/2019	AMZN MKTP US	\$	218.83	Facility supplies for agency
TANYA REID	09/19/2019	AMZN MKTP US	\$	800.17	IT supplies for agency
TANYA REID	09/20/2019	AMZN MKTP US	\$	517.20	IT supplies for agency
TANYA REID	09/20/2019	UP, UP AND AWAY!	\$	25.00	Fee for missing hardware in Pride Parade equipment rental
TANYA REID	09/23/2019	MVS INC	\$	1,099.96	Software license renewal for agency
TANYA REID	09/23/2019	WALMART.COM	\$	25.31	Office supplies for agency
TANYA REID	09/23/2019	ALLIANCE OF INFO & REF	\$	52.00	AIRS certification fee
TANYA REID	09/23/2019	4IMPRINT	\$	719.43	Branded outreach balloons
TANYA REID	09/23/2019	CHAMPION AWARDS	\$	25.00	Trophy for Brain Games
TANYA REID	09/23/2019	STANDARD OFFICE SUPPLY	\$	1,047.88	Office supplies for agency
TANYA REID	09/24/2019	AMZN MKTP US	\$	423.72	IT supplies for agency

### FY2020 YTD

Employee	Post Date	Merchant Name	Transaction Amount	Purpose of Expenditure
TANYA REID	10/01/2019	CDW GOVT #VCP5514	\$ 3,580.44	Cisco WebEx Board for agency
TANYA REID	10/03/2019	PAYPAL	\$ 463.35	Furniture for agency
ANTONETTE DOZIER	10/18/2019	PAYPAL	\$ 85.00	Ms. Senior America Pageant ticket
ANTONETTE DOZIER	10/21/2019	SQ *SQ *KRAKEN REPAIR	\$ 802.00	Lodging and travel fees for Ms. Senior America Pageant
ANTONETTE DOZIER	10/21/2019	SQ *SQ *GENTLEMANATEAS	\$ 300.00	Transport for travel to Ms. Senior America Pageant
TANYA REID	10/22/2019	TURNING TECHNOLOGIES	\$ 1,000.00	Software license renewal for agency
TANYA REID	10/29/2019	AMZN MKTP US	\$ 18.99	IT supplies for agency
ANTONETTE DOZIER	10/30/2019	STANDARD OFFICE SUPPLY	\$ 4,944.15	Office supplies for agency
TANYA REID	10/31/2019	STANDARD OFFICE SUPPLY	\$ 1,718.34	IT supplies for agency
TANYA REID	11/01/2019	STANDARD OFFICE SUPPLY	\$ 151.00	IT supplies for agency
TANYA REID	11/06/2019	AMZN MKTP US	\$ 548.14	IT supplies for agency
ANTONETTE DOZIER	11/15/2019	ASAP PACE	\$ 375.00	Professional Administration certification
TANYA REID	11/18/2019	STANDARD OFFICE SUPPLY	\$ 520.40	Supplies for Savvy Caregiver
TANYA REID	11/19/2019	NEW HORIZONS WASHINGTO	\$ 1,200.00	Fee for IT data specialist training
ANTONETTE DOZIER	11/21/2019	PAYPAL	\$ 4,630.80	Fee for social workers training
ANTONETTE DOZIER	11/25/2019	AMZN MKTP US	\$ 147.50	IT supplies for agency
ANTONETTE DOZIER	11/25/2019	AMZN MKTP US	\$ 1,243.11	IT supplies for agency
ANTONETTE DOZIER	11/26/2019	AMZN MKTP US	\$ 92.00	IT supplies for agency
TANYA REID	11/26/2019	AMZN MKTP US	\$ 79.90	Supplies for Senior Holiday Party
TANYA REID	12/02/2019	STANDARD OFFICE SUPPLY	\$ 1,496.87	Office supplies for agency
TANYA REID	12/02/2019	STANDARD OFFICE SUPPLY	\$ 149.84	Office supplies for agency
ANTONETTE DOZIER	12/06/2019	MULTICULTURAL COMMUNIT	\$ 756.00	Language interpreters for outreach event
TANYA REID	12/10/2019	AMAZON.COM*ML8C98053	\$ 32.27	Supplies for Mayor's Senior Holiday Celebration
ANTONETTE DOZIER	12/11/2019	AMZN MKTP US	\$ 184.00	IT supplies for agency
ANTONETTE DOZIER	12/11/2019	AMZN MKTP US	\$ 230.40	IT supplies for agency
TANYA REID	12/11/2019	STANDARD OFFICE SUPPLY	\$ 722.05	Office supplies for agency



ANTONETTE DOZIER	12/12/2019	AMZN MKTP US	\$	216.53	IT supplies for agency
ANTONETTE DOZIER	12/12/2019	AMAZON.COM*5H4GS1J43 A	\$	973.46	IT supplies for agency
TANYA REID	12/12/2019	STANDARD OFFICE SUPPLY	\$	91.20	Office supplies for agency
TANYA REID	12/12/2019	OTC BRANDS INC	\$	73.94	Supplies for Mayor's Senior Holiday Celebration
ANTONETTE DOZIER	12/16/2019	INT*IN *AD BOX PROMO A	\$	1,020.00	Supplies for Mayor's Senior Holiday Celebration
ANTONETTE DOZIER	12/16/2019	INT*IN *AD BOX PROMO A	\$	525.00	Supplies for Mayor's Senior Holiday Celebration
TANYA REID	12/16/2019	STANDARD OFFICE SUPPLY	\$	108.00	Office supplies for agency
TANYA REID	12/20/2019	STANDARD OFFICE SUPPLY	\$	1,403.99	Office supplies for agency
TANYA REID	12/30/2019	ALLIANCE OF INFO & REF	\$	560.00	AIRS membership fee
ANTONETTE DOZIER	01/06/2020	AMZN MKTP US	\$	958.70	IT supplies for agency
TANYA REID	01/06/2020	BALDWIN GRAPHICS INC	\$	2,316.30	Business cards for agency
TANYA REID	01/07/2020	PAYPAL	\$	1,399.74	Agency surplus property moving and delivery fee
TANYA REID	01/09/2020	INT*IN *ACSI TRANSLATI	\$	240.00	American Sign Language interpreters for adult protective services
TANYA REID	01/09/2020	INT*IN *ACSI TRANSLATI	\$	960.00	American Sign Language interpreters for outreach event
ANTONETTE DOZIER	01/13/2020	STAPLES 00115618	\$	84.76	Office supplies for agency
ANTONETTE DOZIER	01/14/2020	STAPLES 00115618	\$	79.96	Office supplies for agency
ANTONETTE DOZIER	01/15/2020	PAYPAL	\$	300.00	Professional services for Mayor's Senior Holiday Celebration
TANYA REID	01/17/2020	AMZN MKTP US	\$	459.90	Office supplies for agency
ANTONETTE DOZIER	01/20/2020	AMZN MKTP US	\$	179.85	Supplies for Cupid's Kids event
TANYA REID	01/20/2020	STANDARD OFFICE SUPPLY	\$	950.53	Office supplies for agency
TANYA REID	01/20/2020	STANDARD OFFICE SUPPLY	\$	3,301.75	Office supplies for agency
ANTONETTE DOZIER	01/21/2020	AMZN MKTP US	\$	224.25	Supplies for Cupid's Kids event
TANYA REID	01/22/2020	AMZN MKTP US	\$	17.18	IT supplies for agency
TANYA REID	01/22/2020	AMZN MKTP US	\$	87.92	IT supplies for agency

**Attachment Q11 a/b: Budget Breakdown**

Fiscal Year 2020									
Program	Program Code Title	Activity	Activity Title	Fund	Fund Title	Approved Budget	Revised Budget	Actual Spending (Q1)	FY20 is Currently in Progress - No Variance Explanation
1000	AGENCY MANAGEMENT SERVICES	1010	PERSONNEL COSTS ACTIVITY	0100	Local	\$ 4,302,358.65	\$ 4,227,358.65	\$ 943,497.09	
				0700	Intradistrict	\$ 1,886,291.02	\$ 1,886,291.02	\$ 350,296.38	
				8200	Federal Grant	\$ 631,789.74	\$ 631,789.74	\$ 127,784.65	
				8250	Medicaid	\$ 1,488,334.21	\$ 1,488,334.21	\$ 273,712.66	
		1040	CONTRACT AND PROCUREMENT ACTIVITY	0100	Local	\$ 71,000.00	\$ 71,000.00	\$ 1,530.00	
		1045	INFORMATION TECHNOLOGY	0100	Local	\$ 458,770.17	\$ 458,770.17	\$ 40,026.92	
		1096	FLEET SERVICES	0100	Local	\$ 61,000.00	\$ 61,000.00	\$ 32,178.98	Variance in appropriation is due to reprogramming of \$75,000.
<b>1000 Total</b>						<b>\$ 8,899,543.79</b>	<b>\$ 8,824,543.79</b>	<b>\$ 1,769,026.68</b>	
9200	CONSUMER INFO., ASSISTANCE AND OUTREACH	9215	COMMUNITY OUTREACH AND SPECIAL EVENTS	0100	Local	\$ 652,753.84	\$ 652,753.84	\$ 238,083.26	
				8250	Medicaid	\$ 247,045.89	\$ 247,045.89	\$ 74,075.74	
		9222	ADVOCACY/ELDER RIGHTS	0100	Local	\$ 1,057,604.24	\$ 1,057,604.24	\$ 107,717.73	
				0700	Intradistrict	\$ 100,000.00	\$ 100,000.00	\$ 9,755.67	
				8200	Federal Grant	\$ 175,090.00	\$ 175,090.00	\$ -	Due to timing of federal funding, MFP Program was not in original budget for FY20. This makes the \$45,000 difference in appropriation.
		9230	ASSISTANCE AND REFERRAL SERVICES	0100	Local	\$ 546,943.81	\$ 546,943.81	\$ 216,638.16	
				0700	Intradistrict	\$ -	\$ 45,000.00	\$ 36,742.97	
				8200	Federal Grant	\$ 224,950.50	\$ 224,950.50	\$ -	
				8250	Medicaid	\$ 248,852.05	\$ 248,852.05	\$ 203,778.79	
<b>9200 Total</b>						<b>\$ 3,253,240.33</b>	<b>\$ 3,298,240.33</b>	<b>\$ 886,792.32</b>	
9400	HOME AND COMMUNITY BASED SUPPORT PROGRAM	9420	IN-HOME SERVICES	0100	Local	\$ 8,610,386.98	\$ 8,610,386.98	\$ 1,714,305.46	
				8200	Federal Grant	\$ 245,370.00	\$ 245,370.00	\$ -	
		9430	LEAD AGENCIES AND CASE MANAGEMENT	0100	Local	\$ 9,027,926.63	\$ 9,027,926.63	\$ 1,722,636.57	
				8200	Federal Grant	\$ 931,204.50	\$ 931,204.50	\$ -	
				8250	Medicaid	\$ 1,066,552.20	\$ 1,066,552.20	\$ 219,687.08	
		9440	SENIOR WELLNESS CENTER/FITNESS	0100	Local	\$ 2,769,278.00	\$ 2,769,278.00	\$ 419,571.07	
				0700	Intradistrict	\$ -	\$ -	\$ -	
				8200	Federal Grant	\$ 120,625.00	\$ 120,625.00	\$ -	
		9460	SENIOR VILLAGES	0100	Local	\$ 303,970.00	\$ 303,970.00	\$ 75,995.50	Variance in appropriation is due to inclusion of rollover funds for ALZ (ADSSP) grant for \$525,483.93.
		9470	SUPPORTIVE RESIDENTIAL SERVICES	0100	Local	\$ 734,853.00	\$ 734,853.00	\$ 26,201.82	
		9475	CAREGIVER SUPPORT	0100	Local	\$ 931,332.14	\$ 931,332.14	\$ 353,845.01	
				8200	Federal Grant	\$ 399,009.00	\$ 924,492.93	\$ 18,171.30	
				8250	Medicaid	\$ 91,217.36	\$ 91,217.36	\$ -	
		9485	TRANSPORTATION	0100	Local	\$ 5,118,209.75	\$ 5,118,209.75	\$ 1,380,883.03	
				8200	Federal Grant	\$ 220,030.00	\$ 220,030.00	\$ -	
		9490	DAY PROGRAMS	0100	Local	\$ 1,362,436.85	\$ 1,362,436.85	\$ 193,687.86	
				8200	Federal Grant	\$ 149,776.00	\$ 149,776.00	\$ -	
<b>9400 Total</b>						<b>\$ 32,082,177.41</b>	<b>\$ 32,607,661.34</b>	<b>\$ 6,124,984.70</b>	
9500	NUTRITION	9520	COMMUNITY DINING	0100	Local	\$ 2,242,371.50	\$ 2,242,371.50	\$ 467,194.31	
				8200	Federal Grant	\$ 2,622,900.00	\$ 2,622,900.00	\$ 51,549.00	
		9530	HOME DELIVERED MEALS	0100	Local	\$ 3,310,546.50	\$ 3,272,380.66	\$ 1,274,166.45	
				8200	Federal Grant	\$ 1,519,082.00	\$ 1,519,082.00	\$ -	Variance in appropriation is due to reprogramming of \$38,165.84.
		9540	NUTRITION SUPPLEMENTS	0100	Local	\$ 27,177.00	\$ 27,177.00	\$ 1,795.86	
		9550	COMMODITY AND FARMERS MARKET	0100	Local	\$ 410,000.00	\$ 410,000.00	\$ 176,883.99	
				8200	Federal Grant	\$ -	\$ -	\$ -	
<b>9500 Total</b>						<b>\$ 10,132,077.00</b>	<b>\$ 10,093,911.16</b>	<b>\$ 1,971,589.61</b>	
<b>NET TOTAL</b>						<b>\$ 54,367,038.53</b>	<b>\$ 54,824,356.62</b>	<b>\$ 10,752,393.31</b>	

Fiscal Year 2019									
Program	Program Code Title	Activity	Activity Title	Fund	Fund Title	Approved Budget	Revised Budget	Actual Full Year Spending	Year-End Variance Explanation
1000	AGENCY MANAGEMENT SERVICES	1010	PERSONNEL COSTS ACTIVITY	0100	Local	\$ 2,352,393.86	\$ 2,526,638.86	\$ 2,489,501.24	
				0700	Intradistrict	\$ -	\$ -	\$ 48,640.03	Federal funds increased due to SHIP grant being moved from GWU to in-house for PS to support program activities.
				8200	Federal Grant	\$ 434,637.80	\$ 782,961.34	\$ 526,949.94	
				8250	Medicaid	\$ 1,264,915.07	\$ 1,264,915.07	\$ 975,310.85	Slight variances are due to small surpluses under Medicaid,

		1040	CONTRACT AND PROCUREMENT ACTIVITY	0100	Local	\$	71,000.00	\$	71,000.00	\$	70,954.60	Fleet Services, and Information Technology at the end of
		1045	INFORMATION TECHNOLOGY	0100	Local	\$	603,770.17	\$	561,091.40	\$	380,072.07	FY19.
		1096	FLEET SERVICES	0100	Local	\$	59,143.86	\$	59,143.86	\$	47,103.62	
<b>1000 Total</b>							<b>\$ 4,785,860.76</b>		<b>\$ 5,265,750.53</b>		<b>\$ 4,538,532.35</b>	<b>\$727,218.18</b>
9200	CONSUMER INFO., ASSISTANCE AND OUTREACH	9215	COMMUNITY OUTREACH AND SPECIAL EVENTS	0100	Local	\$	695,621.88	\$	514,334.88	\$	692,141.06	\$224,950.50 was formulated in CSG-50, however the program was moved from GWU to in-house and the funds were moved to PS under 1010 above. MFP budget of \$69k was expended in 1010 Personnel activities \$48k and 9200 Community Outreach \$5k. Please note that Assistance & Referral Services expenditure shows over spent in the program area, however, these are accounted for in other activity lines across program areas for the entire agency. (from the \$919,180.67 expenditures, \$780,042.62 is accounted in personnel activities 1010, \$77,338.08 in Assistance & Referral 9230, and \$61,800 in Community Outreach & Special Events 9215.
				0700	Intradistrict	\$	-	\$	69,615.52	\$	5,517.59	
				8250	Medicaid	\$	239,533.77	\$	239,533.77	\$	225,122.59	
		9222	ADVOCACY/ELDER RIGHTS	0100	Local	\$	1,057,604.24	\$	1,057,604.24	\$	1,056,299.54	
				0700	Intradistrict	\$	179,478.00	\$	179,478.04	\$	179,004.01	
				8200	Federal Grant	\$	175,090.00	\$	365,847.00	\$	334,786.38	
		9230	ASSISTANCE AND REFERRAL SERVICES	0100	Local	\$	84,790.00	\$	84,790.00	\$	919,180.67	
				0700	Intradistrict	\$	-	\$	-	\$	-	
				8200	Federal Grant	\$	224,950.50	\$	-	\$	-	
				8250	Medicaid	\$	210,926.25	\$	210,926.25	\$	531,321.16	
<b>9200 Total</b>							<b>\$ 2,867,994.64</b>		<b>\$ 2,722,129.70</b>		<b>\$ 3,943,373.00</b>	<b>(\$1,221,243.30)</b>
9400	HOME AND COMMUNITY BASED SUPPORT PROGRAM	9420	IN-HOME SERVICES	0100	Local	\$	6,905,237.11	\$	9,155,237.11	\$	9,093,993.56	In-home Services budget increased by \$2,250,000 due to Safe at Home additional funding in FY19. Federal funds in Caregivers Support and Lead Agencies increased due to FY18 rollover of ADSSP, title IIIIE, and title IIIB. Other small variances under programmatic areas are due to small surpluses at the end of FY19 by grantees.
				8200	Federal Grant	\$	245,370.00	\$	245,370.00	\$	245,370.00	
		9430	LEAD AGENCIES AND CASE MANAGEMENT	0100	Local	\$	9,946,610.51	\$	9,946,610.51	\$	9,068,804.02	
				0700	Intradistrict	\$	-	\$	-	\$	-	
				8200	Federal Grant	\$	931,204.52	\$	1,141,086.53	\$	1,031,760.67	
				8250	Medicaid	\$	958,460.70	\$	958,460.70	\$	668,156.40	
		9440	SENIOR WELLNESS CENTER/FITNESS	0100	Local	\$	2,888,078.00	\$	2,888,078.00	\$	2,860,468.77	
				0700	Intradistrict	\$	49,480.00	\$	49,480.00	\$	46,985.17	
				8200	Federal Grant	\$	120,625.00	\$	165,861.00	\$	139,517.99	
		9460	SENIOR VILLAGES	0100	Local	\$	300,000.00	\$	300,000.00	\$	293,113.24	
		9470	SUPPORTIVE RESIDENTIAL SERVICES	0100	Local	\$	734,853.00	\$	734,853.00	\$	734,853.00	
		9475	CAREGIVER SUPPORT	0100	Local	\$	117,692.27	\$	117,692.27	\$	35,358.21	
				8200	Federal Grant	\$	399,009.00	\$	1,176,723.68	\$	645,946.50	
				8250	Medicaid	\$	78,461.49	\$	78,461.49	\$	30,962.53	
		9485	TRANSPORTATION	0100	Local	\$	5,131,481.75	\$	5,118,185.75	\$	5,086,975.93	
				8200	Federal Grant	\$	220,030.00	\$	220,030.00	\$	210,072.89	
		9490	DAY PROGRAMS	0100	Local	\$	1,526,082.85	\$	1,526,082.85	\$	1,520,135.97	
				8200	Federal Grant	\$	149,776.00	\$	193,652.00	\$	149,097.00	
<b>9400 Total</b>							<b>\$ 30,702,452.20</b>		<b>\$ 34,015,864.89</b>		<b>\$ 31,861,571.85</b>	<b>\$2,154,293.04</b>
9500	NUTRITION	9520	COMMUNITY DINING	0100	Local	\$	2,175,371.50	\$	1,888,388.27	\$	1,888,388.27	Home Delivered & Community Dining Federal funds increase due to FY18 rollover.
				8200	Federal Grant	\$	2,622,900.00	\$	3,574,005.78	\$	2,651,062.24	
		9530	HOME DELIVERED MEALS	0100	Local	\$	3,310,546.50	\$	3,310,546.50	\$	3,310,556.50	
				8200	Federal Grant	\$	1,519,082.00	\$	1,749,451.88	\$	1,577,126.21	
		9540	NUTRITION SUPPLEMENTS	0100	Local	\$	21,150.00	\$	21,150.00	\$	21,150.00	
		9550	COMMODITY AND FARMERS MARKET	0100	Local	\$	410,000.00	\$	410,000.00	\$	409,977.14	
				8200	Federal Grant	\$	-	\$	-	\$	-	
<b>9500 Total</b>							<b>\$ 10,059,050.00</b>		<b>\$ 10,953,542.43</b>		<b>\$ 9,858,260.36</b>	<b>\$1,095,282.07</b>
<b>NET TOTAL</b>							<b>\$ 48,415,357.60</b>		<b>\$ 52,957,287.55</b>		<b>\$ 50,201,737.56</b>	<b>\$2,755,549.99</b>



# Department of Aging and Community Living

## Public Assistance Cost Allocation Plan

*Effective Date: April 1, 2019*

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# ***Chapter 1 –Public Assistance Cost Allocation CERTIFICATION***

I certify that:

- (1) The information contained in this cost allocation plan is prepared in conformance with 2 CFR Part 200 - Uniform Administration Requirements, Cost Principles, and Audit Requirements for Federal Awards.
- (2) The costs are accorded consistent treatment through the application of generally accepted accounting principles appropriate to the circumstances.
- (3) An adequate accounting and statistical system exists to support claims that will be made under the cost allocation plan; and
- (4) The information provided in support of the proposed cost allocation plan is accurate.

District of Columbia – Department of Aging and Community Living  
Governmental Unit

  
\_\_\_\_\_  
Signature

Laura Newland  
\_\_\_\_\_  
Name of Official

Executive Director, D.C. Department of Aging and Community Living  
\_\_\_\_\_  
Title

3/29/19  
\_\_\_\_\_  
Date

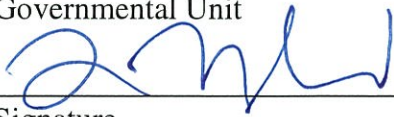
## ***Chapter 2 –Public Assistance Cost Allocation Plan/Amendment (PACAP) Checklist***

Public Assistance agencies (PA) are responsible for reviewing and analyzing their operations and developing a Plan that will adequately describe how administrative costs are identified, measured, and allocated to benefitting programs. Subpart E of 45 CFR Part 95 establishes the cost allocation plan requirements that the Public Assistance (PA) agency must follow in the preparation of the plan. Below is a checklist showing the items supporting the Public Assistance Cost Allocation Plan submitted within this document.

	<b>Checklist Item</b>	<b>Comment / Location of Item within Proposal</b>
1	A summary of changes to the PACAP.	See Chapter 3 of this proposal.
2	An organizational chart showing the placement of each organizational component.	See Chapter 4 of this proposal.
3	A listing of all Federal and non-Federal programs performed, administered, or serviced.	See Chapter 7 of this proposal.
4	A description of the activities performed by each organizational component and where it is not self-explanatory an explanation of the benefits provided to Federal programs.	See Chapter 5 of this proposal.
5	The procedures used to identify, measure, and allocate costs to each benefitting program and activity, including activities with different Federal Financial Participation (FFP) rates.	See Chapter 5 of this proposal.
6	The estimated cost impact resulting from proposed changes to the previously approved Plan.	See Chapter 3 of this proposal.
7	A statement stipulating that wherever costs are claimed for services provided by a governmental agency outside the PA agency they will be supported by a written agreement which	See Chapter 7 of this proposal.

	Checklist Item	Comment / Location of Item within Proposal
	includes, at a minimum, the specific service(s) being purchased, the basis upon which the billing is made by the provided agency, and a stipulation that the billing will be based on the actual costs incurred (45 CFR 95.507 (b) (6)).	
8	If the PA programs are administered by local government agencies under a State supervised system the PA agency's Plan will also include a cost allocation plan(s) for local agencies.	Not Applicable
9	A certification by a duly authorized official of the PA agency containing the statements shown in 45 CFR 95.507 (b) (8) (i)-(iv).	See Chapter 1 of this proposal.
10	Other information as necessary to establish the validity of the procedures used by the State agency to identify, measure, and allocate costs.	Presented throughout the proposal.

District of Columbia – Department of Aging and Community Living  
 Governmental Unit

  
 \_\_\_\_\_  
 Signature

Laura Newland  
 \_\_\_\_\_  
 Name of Official

Executive Director  
 \_\_\_\_\_  
 Title

3/29/19  
 \_\_\_\_\_  
 Date

\_\_\_\_\_  
 Signature

\_\_\_\_\_  
 Name of Official

\_\_\_\_\_  
 Title

\_\_\_\_\_  
 Date



# ***Chapter 3 –Executive Summary***

In accordance with the guidelines outlined in Subpart E of 45 Code of Federal Regulations (CFR) Part 95, and Office of Management and Budget (OMB) Circular, “Cost Principles for State, Local and Indian Tribal Governments,” now located at 2 CFR Part 200 a cost allocation plan for the Department of Aging and Community Living (formally known as the Office on Aging). The cost allocation plan describes the methodology utilized by the Department of Aging and Community Living to identify, measure, and allocate all costs to each of the programs operated within the agency.

## **Introduction**

The mission of the Department of Aging and Community Living (DACL) is to advocate, plan, implement, and monitor programs in health, education, employment, and social services which promote longevity, independence, dignity, and choice for older District residents (age 60 plus), people with disabilities (age 18 to 59), and their caregivers.

## **Agency Summary**

The Office on Aging was created by DC Law 1-24 in 1975 as the District's State and Area Agency on Aging and structured to carry out advocacy, leadership, management, programmatic, and fiscal responsibilities. Beginning in 2019, The Office on Aging is known as The Department of Aging and Community Living. The Department of Aging and Community Living oversees the operation of the Aging and Disability Resource Center (ADRC). ADRC provides a coordinated system of information and access for individuals seeking long-term services and supports. This is accomplished through the provision of unbiased, reliable information, counseling, and service access to older adults (60 years and older), people with disabilities (18 to 59 years old), and their caregivers. ADRC facilitates the acquisition of services individualized to the unique needs and desires expressed by each person.

Additionally, DACL funds a Senior Service Network (“Network”) comprised of 20 community-based non-profit and private organizations that operate more than 30 programs that provide direct services to the District's older adult residents. These services support a broad range of legal, nutrition, social, and health services

including adult day care, caregiver support, transportation, long-term care options counseling, and community transition services, among other community-based supports.

As noted above, DCOA was created in 1975 and the name changed to the Department of Aging and Community Living (DACL) in 2019 . .

## **Organization of the Plan**

This submission is comprised of one Volume with a number of sections all related to DAACL. The document first provides an overview of the Cost Allocation Plan, a description of the nature and extent of services by organizational unit and then details the methodology of the proposed Random Moment Time Sample utilized by DAACL.

## **Summary of Changes from the Previously Approved Public Assistance Cost Allocation Plan**

Notable changes from the previously submitted Public Assistance Cost Allocation Plan for DAACL include:

1. Changing references to Office on Aging and DCOA to The Department of Aging and Community Living and DAACL throughout the document.
2. In Chapter 8 Random Moment Time Study: The deletion of Program Code 105 *Caregiver Respite* and Activity Codes (207 and 256) associated with that Program. Participants performing those activities will now use Activity codes 202, 212, or 252. The definitions for Activity Codes 202, 212, and 252 and the RMTS matrix have been updated to reflect the change.
3. In Chapter 8 Random Moment Time Study: The addition of Random Moment Time Study Activity Codes supporting activities associated with the Elderly & Persons with Physical Disabilities (EPD) Waiver-related program (Activity Codes 210 thru 216). The Activity code definitions and the RMTS matrix have been updated to reflect the change.
4. Updated definition of Activity Code 200 *Medicaid Outreach / Program Education* to allow providing *information on becoming Medicaid eligible through Spend Down*, as an allowable activity. The Activity code definition has been updated to reflect the change.
5. Updated Random Moment Time Study minimum sample size calculation to reflect Centers for Medicare and Medicaid Services (CMS) guidance for statistical validity.

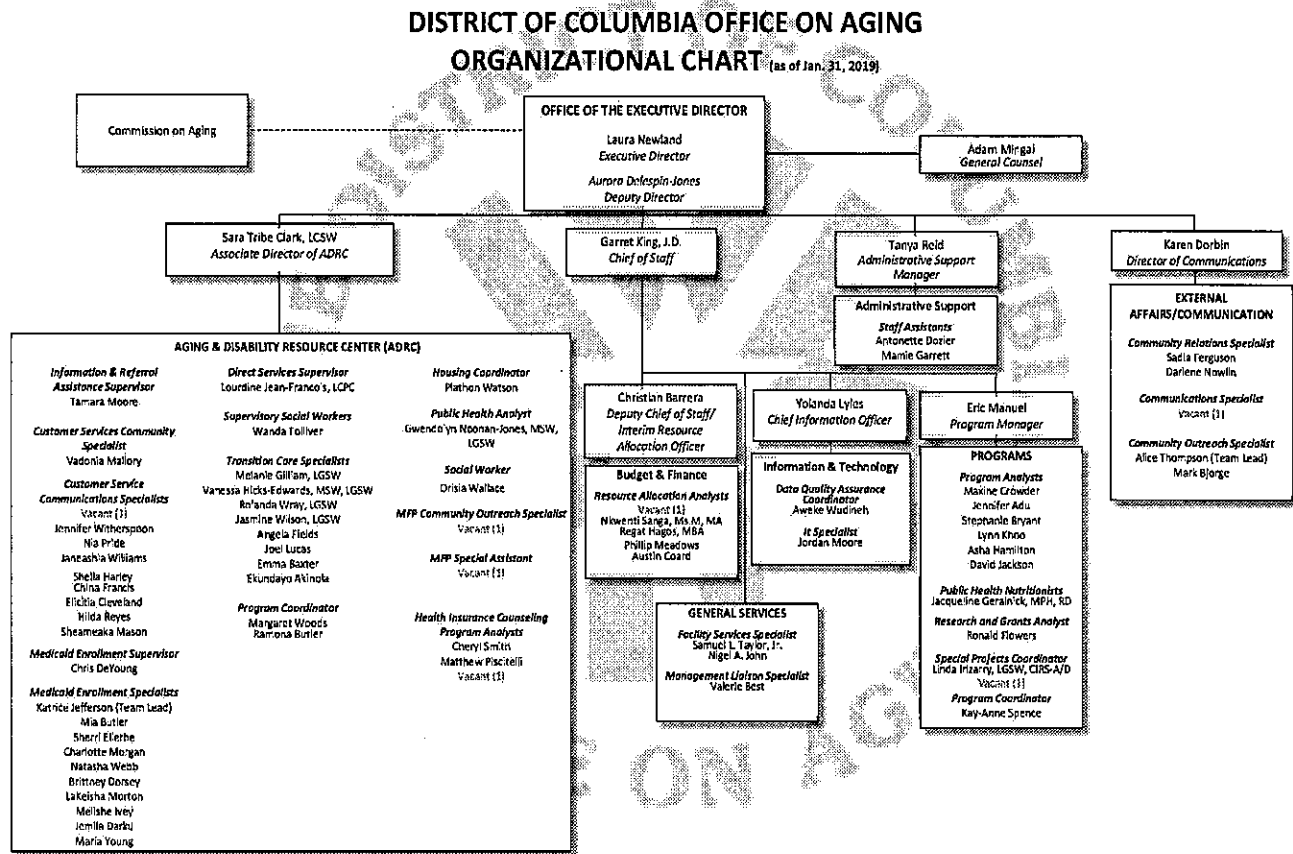
## **Cost Impact Statement Relative to this Public Assistance Cost Allocation Plan**

Through the PACAP, DACL will document the provision of Medicaid, Administration on Aging and discretionary and locally funded administrative costs. Services are provided through an extensive network of District providers in the 8 Wards receiving federal, discretionary grant and District funding from DACL. A Memorandum of Understanding (MOU) is in place between the DC Department of Health Care Finance and the DC Department of Aging and Community Living.

# Chapter 4 -Organizational Charts

The following organizational chart was developed to reflect the most recent structure of the DACL. This chart is presented to provide the reader with an overall view of the Department.

## DACL Organizational Chart



# *Chapter 5 -Details of Activities and Allocations*

## **Nature and Extent of Services**

The mission of DACL is to advocate, plan, implement, and monitor programs in health, education, employment, and social services that promote longevity, independence, dignity, and choice for older District residents (age 60 plus), people with disabilities (age 18 to 59), and their caregivers. DACL provides consumer information, assistance, and outreach for District seniors, people with disabilities, and caregivers so that they can be better informed about home and community-based resources, improve their quality of life, and maintain their independence. The agency also offers home health, adult day health, nutrition resources and services, case management, residential facilities, elder rights assistance, health promotion, wellness, counseling, legal assistance, recreation, transportation, and caregiver services and supports to facilitate aging in place.

## **Cost Structure:**

Costs consist of those directly charged to the DC Department on Aging cost center and an assessment to the department from the District-Wide Cost Allocation Plan (DWCAP).

### **✦ Office of the Executive Director**

The Executive Director is the chief advocate for seniors, people with disabilities, and their caregivers. The Executive Director leads the development and implementation of a multi-year plan of policies, programs, activities and services (services are designed to provide assistance, employment, housing, nutritional programs, recreation, information and referral and counseling services); develops a State Plan on Aging (State Plan); and contracts with and makes grants to public and private agencies using Older Americans Act funds, other federal funds and District government appropriated funds. Additionally, the Executive Director maintains community contacts and represents DACL for the purpose of stimulating, informing and educating local organizations and community-at-large on services, needs, facilities, legislation and problems the seniors, people with disabilities and their caregivers are facing.

The staff of the Executive Office assists the Executive Director with all of DACL's activities, including the generation of the annual work plan, defending the annual budget and long-range projections, coordination

of the delivery of services, development and implementation of strategies to promote cooperation with public providers, implementation of periodic management and program reviews ensuring that programs operated by DACL meet Federal and District performance standards, that the District's policies related to EEO are implemented, and that reports required by Federal and District agencies are provided to appropriate entities.

The Commission on Aging is a Mayoral-appointed advisory board that provides guidance on issues impacting disabled and elderly District residents.

### **Allocation Methodology:**

The costs for the Office of the Director will be allocated to those Administrations/Offices benefiting from it based on FTE's.

#### **➤ Office of the General Counsel**

The General Counsel to DACL provides legal advice to the Executive Director and the DACL team on a broad range of issues, including grants management, litigation, and operational issues. The General Counsel also coordinates DACL's efforts on key legislative and public policy issues, and serves as DACL's Ethics and FOIA Officer. The General Counsel participates in the Elder Abuse Prevention Committee, which is comprised of District, federal and community stakeholders.

### **Allocation Methodology:**

The costs for the Office of the General Counsel will be allocated to those Administrations/Offices benefiting from it based on FTE's.

#### **➤ Office of the Chief of Staff**

The Chief of Staff's responsibilities include overseeing a wide variety of major executive policy issues and/or decisions and projects formulated at the Executive Director's level. The Chief of Staff serves as the Executive Director's key management advisor and participates in identification of needs of the District's seniors, people with disabilities, and their caregivers in recommending strategies and in setting priorities that will meet those needs. Additionally, the Chief of Staff is responsible for several key areas, including: formulating and executing the operating budget; managing day-to-day activities involving staff and grantees; providing technical advice and guidance to senior management; developing and implementing management controls, acceptable work standards

and performance objectives; and cultivating and maintaining relationships with local and federal government officials and other key stakeholders. The Chief of Staff is also responsible for ensuring the Director's vision is fulfilled and ensuring accountability, transparency and efficiency throughout the agency.

### **Allocation Methodology:**

The costs for the Office of the Chief of Staff will be allocated to those Administrations/Offices benefiting from it based on FTE's.

#### **✦ Office of General Services**

General Services provides infrastructure support to DAFL. Among the supports provided are Information Technology (IT), Human Resources, Facility Services, and Data Quality Assurance.

### **Allocation Methodology:**

The costs for the Office of the General Counsel will be allocated to those Administrations/Offices benefiting from it based on FTE's.

#### **✦ Office of External Affairs/Communication**

The Office of External Affairs/Communication is under the supervision of the Director of Communications. The Office of External Affairs/Communication plays a key role in the development of the overall strategic direction and internal/external communications plan for the entire agency. This requires working closely with the Executive Director and management team to determine the needs of the agency. The Director is responsible for the development and implementation of the communications plan in order to raise visibility of the agency and enhance public understanding of the program and service array for the agency's stakeholders. Additional responsibilities include increasing the agency's' capacity to speak in a unified voice and advocate on behalf of the agency through community outreach and special events; via both traditional and digital platforms.

### **Allocation Methodology:**

The costs for the Office of External Affairs/Communication will be allocated to those Administrations/Offices benefiting from it based on FTE's.

#### **✦ Director of External Affairs and Communications**

The Director of External Affairs and Communications serves as the primary spokesperson for DACL to representatives of the media and community stakeholders, in addition to providing leadership and management to the agency's External Affairs and Communications division. Additional responsibilities include, developing and articulating the vision for the agency to key administration stakeholders; developing, championing, and implementing a comprehensive integrated strategic communications plan geared for both external and internal constituencies; and ensuring that the overall communications program creates a consistent message that helps strengthen D.C. Department of Aging and Community Living's position with all of its key constituents. This includes developing, directing, coordinating, and administering policies relating to all of the agency's internal and external communications. The Director manages all communications, both internal and external.

### **Allocation Methodology:**

The costs for the Director of External Affairs and Communications will be allocated to those Administrations/Offices benefiting from it based on FTE's.

### **Office of Policy, Planning & Evaluation**

The Office of Policy, Planning & Evaluation is under the supervision of the Director of Policy, Planning, and Evaluation. The Office of Policy, Planning & Evaluation is responsible for strategic planning and policy and program review. This unit provides guidance to the Executive Director and management team to identify program needs and developing results and performance metrics for those programs and services. The unit plays a key role in data collection and evaluation regarding performance to ensure the agency meets quality improvement, quality assurance, and other strategic goals. The unit also provides support for policy development and analysis, with a major role in helping the agency conduct research to develop practical and efficient strategies for aging and disability policies. In addition, this unit supports the agency with project management of important initiatives that further the mission and general function of the agency.

The Director of Policy, Planning, and Evaluation provides senior level coordination for planning, organizing, and developing vital policies, regulations, directives, and procedures required to resolve issues and challenges that hinder the successful accomplishment of the agency's strategic plans, goals, and objectives. The Director of Policy, Planning and Evaluation oversees the development and implementation of internal and external reports, strategic plans, and initiatives related to DACL. Additionally, the director manages requests for data and other inquiries



related to DACL's performance. The Director monitors and tracks performance in order to ensure the agency meets quality improvement, quality assurance, and other goals. The Director of Policy, Planning and Evaluation serves as DACL's liaison to public and private providers, government officials, and other stakeholders regarding policy, data evaluation, and agency planning.

### **Allocation Methodology:**

The costs for the Director of Policy, Planning and Evaluation will be allocated to those Administrations/Offices benefiting from it based on FTE's.

### **✦ Resource Allocation Officer**

The Resource Allocation Officer works independently under the supervision of the Chief of Staff. The Resource Allocation Officer is responsible for serving as DACL's chief custodian and records manager over program and service related data. The Resource Allocation Officer ensures that the team provides timely, accurate and complete records for all pertinent information and data in a safe and secure manner. Additionally, the Resource Allocation Officer oversees the following: analysis of DACL's monthly obligations; budget plans for major dollar expenditures; adjustments; un-liquidated obligation reviews and unexpired resources against programs. He or she prepares the Executive Director and the Chief of Staff for budget and performance hearings with the necessary programmatic and financial data, talking points and other pertinent information to assist in the understanding of the agency's fiscal status. The Resource Allocation Officer also manages the programmatic and finance team.

### **Allocation Methodology:**

The costs for the Resource Allocation Officer will be allocated to those Administrations/ Offices benefiting from it based on FTEs.

### **✦ The Office of Programs and Budget**

The Office of Programs and Budget is under the supervision of the Resource Allocation Officer. This office has responsibility for contracts, resource allocations, program analysis, and nutrition. The staff is responsible for providing timely, accurate and complete records for all pertinent information and data in a safe and secure manner. The information includes programmatic and budget data including analysis of DACL's budget and monthly obligations. The Office of Programs and Budget ensures the financial integrity of DACL by ensuring

accountability, accuracy, timeliness of payment, and provides assistance to sub-grantees to ensure provider network maintains a positive cash flow so providers can offer timely services and assistance to DACL clients.

### **Allocation Methodology:**

The costs for the Office of Programs and Budget will be allocated to those Administrations/Offices benefiting from it based on FTEs.

#### **Office of the Associate Director of the Aging and Disability Resource Center**

The Associate Director of the Aging and Disability Resource Center (ADRC) is responsible for all components of ADRC including the development, administration, and operations of all home and community-based programs and services ADRC offers to older adults, caregivers, and people with disabilities in the District of Columbia. ADRC offers a coordinated system of information and access for individuals seeking long term care services and supports. This is accomplished through the provision of information and assistance; options counseling; community transition assistance, and service access to older adults, individuals with disabilities, and their caregivers.

The Associate Director oversees the development of programmatic policies and procedures, establishment of comprehensive measurable objectives, quality assurance measures, and staff evaluation. ADRC programs include, but are not limited to, information and referral/assistance, long-term care options counseling, community transition assistance (including the Money Follows the Person demonstration), assistance with referral and enrollment in DC Medicaid services provided by the Department of Health Care Finance (DHCF), housing coordination, and employment services. The Associate Director provides leadership in the development of partnerships with other DC agencies and community-based organizations, and works closely with key health and human service agencies to ensure DACL is participating in a collaborative and coordinated approach to District-wide needs.

ADRC provides DHCF with client data reports on a regular basis. Weekly reports are submitted for Medicaid Adult Day Health Program enrollment ; bi-weekly and quarterly reports are submitted for Medicaid Elderly and Persons with Physical Disabilities Waiver enrollment; and quarterly reports are submitted on Information and Referral Assistance (I&R/A), options counseling, and community transition.

## **Allocation Methodology:**

The costs for the Office of the Associate Director of the Aging and Disability Resource Center (ADRC) will be allocated based on the results of the Random Moment Time Study for staff participating in the RMS, a direct Medicaid allocation for the dedicated FTE and to other programs for staff not participating in the RMS or certified to Medicaid.

### **Information & Referral Assistance (I&R/A) Unit**

The staff of the Information and Referral/Assistance (I&R/A) Unit provide a key point of entry into the senior service, disability, and caregiver networks. The I&R/A Unit includes a call and email center responsible for intake, referral, and assistance and answering a variety of questions about home and community based service. This Unit is DACL's intake point for all District programs and services for older adults and people with disabilities, including the EPD Waiver, State Plan funded Adult Day Health Programs (ADHP), Community Transitions, and all referrals to DACL's Senior Service Network. Members of the community can call, email, or visit in person to obtain assistance on accessing a wide range of home and community-based services, person-centered options counseling on long-term care options, and public benefits.

## **Allocation Methodology:**

The costs for the Information & Referral Unit will be allocated based on the results of the Random Moment Time Study

### **Medicaid Enrollment Unit**

The District of Columbia has an Elderly and Persons with Physical Disabilities (EPD) Medicaid Waiver Program administered by DHCF. This program is a person-centered home and community-based waiver funded by Medicaid and administered by DHCF. DHCF also administers an Adult Day Health Program (ADHP) available to eligible DC residents receiving State Plan Medicaid. ADRC has partnered with DHCF to develop and implement efficient enrollment processes for both the EPD Waiver and ADHP. Through these processes, DC residents are able to access EPD and ADHP services through the ADRC in accordance with the customer service goals of reducing confusion about the enrollment process; increasing inter-agency communication; and reducing enrollment wait times.

## **Allocation Methodology:**

The costs for the Medicaid Enrollment Unit will be direct charged to Medicaid. Staff are certified to Medicaid activity of eligibility determination. 100% of their effort supports the Medicaid program.

### **Community Transition Unit**

DACL provides direct social work services to older adults, people with disabilities and caregivers. ADRC has a team of eight Community Social Workers (one assigned to each ward in the District, focusing on people with disabilities aged 18-59), and an additional group of six social workers, case managers and a nurse primarily responsible for assisting DC residents in transitioning from nursing facilities back into the community.

DACL also funds case management services through its lead agencies in each of the eight DC Wards, which provide direct social work services, assessment, counseling, and case management to adults (60 years and over), and their caregivers.

### **Allocation Methodology:**

The costs for the Community Transition Unit will be allocated based on the results of the Random Moment Time Study.

### **Housing Coordinator**

The Housing Coordinator is responsible for supporting the housing related activities of ADRC. The Housing coordinator helps clients via phone, email, and in person with issues such as housing searches for low income older adults, people with disabilities, and/or veterans; ADA compliant housing; housing counseling for foreclosures and reverse mortgages; in-home repairs; and refers for environmental accessibility adaptations.

### **Allocation Methodology:**

The costs for the Housing Coordinator will be allocated based on the results of the Random Moment Time Study.

## ***Chapter 6 – Indirect Costs Associated with Discretionary Grants***

Since the creation of the Affordable Health Care (AHC) Act, Federal program managers are encouraging states to submit applications for various discretionary grant programs. These programs normally reimburse indirect costs through the application of an indirect cost rate and do not and/or cannot recognize an allocation of a specific dollar amount that results from the PACAP for reimbursement purposes.

Therefore, DACL may develop an indirect cost rate based on the allocations from the PACAP for all discretionary grant/contract programs. In this process, a portion of the overall indirect costs will be assigned to a "discretionary indirect cost pool" and the value of the salaries, wages and fringe benefits of the discretionary grants will be used as the direct cost base. Recognizing that, initially, these will be estimated amounts, they will be adjusted to actual at the end of each fiscal year. These adjustments will then either be added back to or credited to the basic Medicaid claim made during that year. Ultimately, it is expected that the indirect cost rate applicable to the discretionary grant awards will be converted to a fixed rate with a carry-forward to eliminate the need for retroactive adjustments.

DACL believes that this process will accomplish a number of very basic goals: 1) it will assign an amount to the discretionary grants proportionate to the benefit received as required by OMB Circular A-87 now located at 2 CFR Part 200, 2) it will provide for an annual adjustment to actual costs so that there will not be an over/under recovery associated with either the basic Program claim developed under the PACAP nor the discretionary grants, and 3) it will provide a process by which the indirect costs associated with the discretionary grants can be reimbursed to DACL.

# Chapter 7 –General

## 1. Specifically Identifiable Costs

Costs that can be specifically identifiable (and/or benefit one program or funding source) will be directly assigned and claimed against that program or funding source.

## 2. Memorandum of Understanding (MOU)

Wherever costs are claimed for services provided by a governmental agency outside the DACL, those costs will be supported by a written Memorandum of Understanding that includes, at a minimum:

- the specific service(s) being purchased,
- the basis upon which the billing will be made by the provider agency, and
- a stipulation that the billing will be based on the actual cost incurred.

Department of Health Care Financing and DC Department of Aging and Community Living have agreements for the provision of allowable Medicaid administrative activities.

- 93.778 Medical Assistance Programs (Includes Medicaid Admin & Medicaid Indirect Admin as well as HIT and Vendor Payments)
- 93.791 Money Follows the Person Rebalancing Demo (MFP)

## 3. DACL Grants

The DACL Grants for FY 2017 are identified as Discretionary Funding, ACL Title III Funding, Title VII Funding and Additional Grants Funding from Administration for Community Living (ACL) and the USDA.

### Discretionary Funding

- CREST, private grant from the Council of Government (COG) Program Number 15-015
- Medicare Improvements Patients & Provider formula grant from ACL Program Number 93.071
- DC Lifespan Respite, Cooperative Grant, Program Number 93.072
- Alzheimer's Disease Initiative, Cooperative Grant, Program Number 93.763

### Formula Grants

#### Title III Funding

- Part B, Grants for Supportive Services and Senior Centers, Program Number 93.044
- Part C, Congregate Nutrition Services, Congregate Meals, Program Number 93.045

- Part C, Nutrition Services, Home-Delivered Meals, Program Number 93.045
- Part D, Disease Prevention and Health Promotion Services, Preventive Health, Program Number 93.043
- National Family Caregivers Support (NFCSP), Program Number 93.052
- Nutrition Services Incentive Program (NSIP), Program Number 93.053

Title VII Funding

- Programs for Prevention of Elder Abuse, Neglect and Exploitation, Program Number 93.041
- Ombudsman, Program Number 93.042

Additional ACL Grant

- State Health Insurance Assistance Program, Program Number 93.324

Additional United States Department of Agriculture Grants

- Senior's Farmers Market, Program Number 10.576
- Commodity Supplemental Food Program, Program Number 10.565

# ***Chapter 8 -Random Moment Time Study***

***Effective April 1, 2019***

This Chapter describes the Random Moment Time Sampling Plan including the basis for the computation of the sample size and its evaluation.



## DISTRICT OF COLUMBIA

### *Department of Aging and Community Living*

### *Random Moment Sampling System*

#### **PURPOSE**

The DC Department of Aging and Community Living (DACL) Random Moment Time Study (RMTS) is conducted on a continuing basis to provide data for the allocation of direct and indirect costs to various state and federally supported programs. The objective is to identify employee efforts directly related to the programs administered by DAACL. The sample is generated using the facilities of the Sivic Solutions Group (SSG) e-SivicMACS system.

#### **OVERVIEW**

Random Moment Sampling is based on the laws of probability, which, in essence, state that there is a high probability that a relatively small number of random observations will yield an accurate depiction of the overall characteristics of the population for which the sample was taken. An observation at a random moment is a sample of what is happening at a particular instant of time. The basic requirement in selecting a random sample is that every item in the universe be given an equal or known chance of being included in the sample. To ensure that this requirement is met, the sample must be truly random and must exclude human judgments and other influences or biases.

Therefore, Random Moment Time Sampling is a technique for estimating the actual distribution of the worker's effort to various programs by selecting a relatively small portion of the time worked. At random minutes during the day, one or more workers are observed and their specific activity or task at that particular moment in time is recorded. The RMTS is unique among time study techniques in that the participation of those being measured is minimal and relatively few responses offer adequate sample reliability.

#### **POPULATION DEFINED**

The total population is defined as the worker minutes in a quarter. Included in the population is the time worked by all employees in the Aging and Disability Resource Center excluding the Administrator, support staff, and staff certified 100% to a program.

#### **SAMPLE SIZE REQUIRED**

The formula that should be used to determine the sample size is:

$$n = \frac{p(1-p)}{\left(\frac{SE}{t}\right)^2}$$

- Where:
- n = sample size (to be increased by a sampling overload factor to accommodate unforeseen situations such as worker transfers and terminations)
  - p = maximum anticipated rate of occurrence of the activities being observed (anticipated distribution of effort - assumed to be 36%)
  - SE= desired sample precision (.05) (this level is consistent with Centers for Medicare and Medicaid Services (CMS) guidance for statistical validity).
  - t = confidence level factor (1.96 for 95%)

Solving the equation yields:

$$N = \frac{.36(1-.36)}{\left(\frac{.05}{1.96}\right)^2} = 354$$

Increase sample size to 1,500 to account for increases (or decreases) in employees subject to the RMTS and worker transfers and terminations.

### SAMPLE SELECTION AND DISSEMINATION

The RMTS will be drawn from a listing of all active employees subject to the RMTS during the month preceding the sample quarter (i.e. the RMTS for the quarter beginning October 1 will be drawn from an August listing of active employees). The RMTS software will generate the random moments for the quarter from the

population of the total number of eligible employees and total working minutes in each quarter. The moments generated are identified with a number (the observation number) and include the following information:

- \_ Day: Standard workday during the year, official holidays excluded
- \_ Time: Any minute during the working day
- \_ ID#: Personnel Identification Number (PIN)
- \_ Name: Employee name
- \_ Location: Location of Employee

A master report of the above information will be generated in the RMTS system. DACL's RMTS Coordinator oversees the implementation of the sampling. Except for client or program specific travel, meetings or training where the worker is expected to be away from his/her work station for more than 1 hour, the process is for observations to be completed on-line in e-SivicMACS. Participants will complete the on-line observation form based on the instructions contained in this document. A 10% subset of the sample moments are randomly selected for validation by the participants' supervisors.

### **OBSERVATION FORM AND INSTRUCTIONS**

This document contains a copy of the training materials describing the process for completion of the on-line observation. Each RMTS Coordinator, Supervisor, and Participant should be trained in the completion of the Observation Form and the urgent nature to provide accurate and timely responses. Staff are asked to identify the activity performed at the time of the sample moment, the related program and provide a case number, if applicable.

### **PROGRAM CHOICES**

- 101 Medicaid: Medicaid is a joint federal-state health insurance program that provides health care coverage to low-income and/or disabled individuals and families. Medicaid covers many services including doctor visits, hospital care, prescriptions, mental health services, transportation and other services. Select this choice if the person you are working with is on Medicaid, a Medicaid application is being completed or you are attending training that relates to information on the Medicaid program.
- 102 Information and Referral/Assistance: Select this choice if you are providing information, a referral to individuals about services for the older adults and people with disabilities in the community.
- 103 Community Social Work: Select this choice if you are working with older adults and people with disabilities in the community to meet their service needs.
- 104 Community Transition: Select this choice if you are assisting older adults and people with disabilities in their transition from long-term care setting back to the community.
- 106 Housing: Select this choice if you are working with older adults and people with disabilities on

tasks related to finding safe/affordable housing and/or updating their home to be more accessible.

- 107 Any Other Program (Please Specify): Select this program choice if working on a specific program which is not Medicaid or any of the other listed programs. In the comments field please include the name of the program and/or the grant.
- 108 General Administration: Select this choice if the effort at the time of the random moment is general in nature and does not specifically pertain to one of the identified programs, but supports all DACL programs. Examples of activities include:
- Training on completing the Random Moment Sample or other general training
  - General Administration (completing time sheet, answering telephone during office clerical staff break, filling out an annual self-evaluation form, completing personnel files)
  - Lunch, Break, Personal Business
  - Sample Moment Outside Designated Work Schedule
  - Employee on Leave

### **ACTIVITY CHOICES**

The sampled employee has the following Activity Choices:

For activities 200 – 207 the case you are working on must be **clearly** 100% Medicaid-related.

- 200 Medicaid Outreach / Program Education: This activity is selected when providing information about Medicaid programs available to meet specific needs and providing detailed information on the program eligibility requirements and associated services. This includes information on becoming Medicaid eligible through Spend Down.
- 201 Completing Universal Intake Form - Medicaid: This activity is selected when working on collecting required information to complete the Universal Intake Form for Medicaid eligible older adult or person with a disability.
- 202 Medicaid Options Counseling: This activity is selected when reviewing the identified array of Medicaid and other services available for persons with disabilities and their caregivers. This includes working with caregivers of older adults and people with disabilities on Medicaid to provide assistance in their caregiver roles.
- 203 Facilitating Medicaid Applications (Enrollment): This activity is selected when program options have been reviewed and forms are completed for consideration of Medicaid program eligibility and enrollment.
- 204 Medicaid Referral, Coordination and Monitoring: This activity is selected after service options have been presented, and decisions have been made about the services to be provided. Staff make a referral to appropriate service providers, assure coordination of multiple services and routinely check on status of Medicaid service delivery.
- 205 Medicaid Training: This activity is selected when participating in or delivering educational

sessions on work related functions pertaining to the Medicaid program.

- 206 Medicaid Reporting: This activity is selected when participating in the development and completion of Medicaid reports.

For activities 210 – 216 the case you are working on must be **clearly** 100% Elderly & Persons with Physical Disabilities (EPD) Waiver-related.

- 210 EPD Waiver Outreach / Program Education: This activity is selected when providing information about EPD Waiver programs available to meet specific needs and providing detailed information on the program eligibility requirements and associated services. This includes information on becoming Medicaid eligible through Spend Down in order to qualify for the EPD Waiver.
- 211 Completing Universal Intake Form – EPD Waiver: This activity is selected when working on collecting required information to complete the Universal Intake Form for EPD Waiver eligible older adult or person with a disability.
- 212 EPD Waiver Options Counseling: This activity is selected when reviewing the identified array of EPD Waiver and other services available for persons with disabilities and their caregivers. This includes working with caregivers of older adults and people with disabilities enrolled in the EPD Waiver to provide assistance in their caregiver roles.
- 213 Facilitating EPD Waiver Applications (Enrollment): This activity is selected when program options have been reviewed and forms are completed for consideration of EPD Waiver program eligibility and enrollment.
- 214 EPD Waiver Referral, Coordination and Monitoring: This activity is selected after service options have been presented, and decisions have been made about the services to be provided. Staff make a referral to appropriate service providers, assure coordination of multiple services and routinely check on status of EPD Waiver service delivery.
- 215 EPD Waiver Training: This activity is selected when participating in or delivering educational sessions on work related functions pertaining to the EPD Waiver program.
- 216 EPD Waiver Reporting: This activity is selected when participating in the development and completion of EPD Waiver reports.

For activities 250 – 256 the case you are working on is not Medicaid eligible or it is not clear yet whether the individual is Medicaid eligible.

- 250 Non-Medicaid Outreach / Program Education: This activity is selected when providing information about non-Medicaid programs available to meet specific needs and providing detailed information on the program eligibility requirements and associated services to older adults and people with disabilities.
- 251 Completing Universal Intake Form – Non-Medicaid: This activity is selected when working on

collecting required information to complete the Universal Intake Form for a non-Medicaid individual.

- 252 Non-Medicaid Options Counseling: This activity is selected when reviewing the identified non-Medicaid array of services available for people with disabilities and their caregivers. This includes working with caregivers of non-Medicaid older adults and people with disabilities to provide assistance in their caregiver roles.
- 253 Facilitating Non-Medicaid Applications (Enrollment): This activity is selected when program options have been reviewed and forms are completed for consideration of program eligibility and enrollment for non-Medicaid programs.
- 254 Non-Medicaid Referral, Coordination and Monitoring: This activity is selected after service options have been presented, and decisions have been about the services to be provided. Staff make a referral to appropriate non-Medicaid service providers, assure coordination of multiple services and routinely check on status of service delivery.
- 255 Non-Medicaid Training: This activity is selected when participating in or delivering educational sessions on work related functions.
- 300 General Administration: Select this activity when engaged in tasks of a general nature that support a specific program or select Program 107 General Administration if all programs benefit from the activity. Examples of General Administration program choice and General Administration activity choice 300 include attending staff meetings of a general nature that do not pertain to a specific program, organizing work/desk.
- 301 Lunch, Break and Leave: Select this activity with Program 107 General Administration when the sampled employee is at lunch, on a break or on scheduled and unscheduled leave including vacation, sick leave, furlough, etc.
- 302 Any Other Activity (Please Specify): Select this activity if the activity performed at the time of the random moment does not fit into any of the other specified activity choices. Please provide a description of the activity.
- 303 Not Scheduled to Work – Select this activity if the sample moment is outside your designated work schedule.

## **ALLOCATION MATRIX FOR ACTIVITY AND PROGRAM COMBINATIONS**

### ***DACL BASIS TASK ASSIGNMENTS***

The following table provides the valid combinations of program and activities for the DACL RMTS and the associated program funding. Based on CMS guidance the activity and program combinations are either:

- TM represents 100% Medicaid with 50% FFP
- TW represents 100% Elderly & Persons With Physical Disabilities (EPD) Waiver program with 50% FFP
- I&R represents the Information and Referral Program; with Medicaid activity, 50% FFP
- CSW represents the Community Social Work Program; with Medicaid activity, 50% FFP
- CT represents the Community Transition Program; with Medicaid activity, 50% FFP
- LR represents the Caregiver Respite Program; with Medicaid activity, 50% FFP
- H represents the Housing Program;
- AOP represents Any Other Program; with Medicaid activity, 50% FFP
- RD represents observations that are redistributed to Medicaid, Grants or Any Other Program.
- INV represents an invalid response and is selected by the RMS coder.

<b>Programs</b> (across)	101 Medicaid	102 Information & Referral	103 Community Social Work	104 Community Transition	106 Housing	107 Any Other Program	108 General Admin
<b>Activities</b> (down)							
200 Medicaid Outreach/ Program Education	TM	TM	TM	TM		AOP – XIX	
201 Completing Universal Intake Form – Medicaid	TM	TM	TM	TM			
202 Medicaid Options Counseling	TM	TM	TM	TM			
203 Facilitating Medicaid Applications (Enrollment)	TM						
204 Medicaid Referral, Coordination and Monitoring	TM	TM	TM	TM			
205 Medicaid Training	TM						
206 Medicaid Reporting	TM	TM	TM	TM			

<b>Programs</b> (across)	101 Medica id	102 Inform ation & Referr al	103 Commu nity Social Work	104 Commu nity Transiti on	106 Housi ng	107 Any Other Progra m	108 General Admin
<b>Activities</b> (down)							
210 EPD Waiver Outreach/ Program Education		TW	TW	TW		AOP – TW	
211 Completing Universal Intake Form – EPD Waiver		TW	TW	TW			
212 EPD Waiver Options Counseling		TW	TW	TW			
213 Facilitating EPD Waiver Applications (Enrollment)		TW	TW	TW			
214 EPD Waiver Referral, Coordination and Monitoring		TW	TW	TW			
215 EPD Waiver Training		TW	TW	TW			
216 EPD Waiver Reporting		TW	TW	TW			
250 Non- Medicaid Outreach/Progr am Education		I&R Non XIX	CSW Non XIX	CT Non XIX	H Non XIX	AOP Non XIX	
251 Completing Universal Intake Form – Non-Medicaid		I&R Non XIX	CSW Non XIX	CT Non XIX	H Non XIX	AOP Non XIX	



<b>Programs</b> (across)	101 Medica id	102 Inform ation & Referr al	103 Commu nity Social Work	104 Commu nity Transiti on	106 Housi ng	107 Any Other Progra m	108 General Admin
<b>Activities</b> (down)							
252 Non-Medicaid Options Counseling		I&R Non XIX	CSW Non XIX	CT Non XIX	H Non XIX	AOP Non XIX	
253 Facilitating Applications (Enrollment) – Non-Medicaid		I&R Non XIX	CSW Non XIX	CT Non XIX	H Non XIX	AOP Non XIX	
254 Non-Medicaid Referral, Coordination and Monitoring –		I&R Non XIX	CSW Non XIX	CT Non XIX	H Non XIX	AOP Non XIX	
255 Non-Medicaid Training		I&R Non XIX	CSW Non XIX	CT Non XIX	H Non XIX	AOP Non XIX	
300 General Administration	TM	I&R Non XIX	CSW Non XIX	CT Non XIX	H Non XIX	AOP Non XIX	RD
301 Lunch, Break, Leave							RD
302 Any Other Program Activity (please specify)						AOP Non XIX	
303 Not Scheduled to Work							INV

**SAMPLE RETRIEVAL AND PROCESSING**

At the end of each fiscal quarter the percentages of total responses are computed for each program listed on the Observation Form based on the results of the RMTS. These ratios will be applied to the total costs

(salaries/wages and related fringe benefits of the Administrations subject to the RMTS to distribute their costs to the specific programs). In addition, these ratios will be used to distribute related cost centers (clerical support, supervision, related administrative costs, etc.) to the specific programs.

### **RMTS ADMINISTRATION AND QUALITY CONTROL ROLES AND RESPONSIBILITIES**

**Management is committed to the success of the RMTS approach.**

#### **The RMTS Participants will:**

- Receive e-mails from dcoarms@sivicsolutions.com with the following information:
  - Sample moment date and time;
  - Employee ID;
  - Instructions on accessing and completing the observation form;
  - A hyperlink to the e-SivicMACS observation form;
  - Contact information for questions or concerns.
- Click on the link in the email to access the internet sample observation form.
- Enter her/his employee ID to sign in to the internet observation form.
- After the observation form is displayed, select a program code and an activity code, using the drop down menus, which best describe the activity being performed at the sample moment.
- Enter comments in the observation form describing the activity being performed at the sample moment or the training attended.
- If working with a client, enter the ID (including the Medicaid ID, if established, when performing a Medicaid related activity) and name or case name.
- Click Save and Exit to complete your sample observation.
- This process must be completed within 2 business days of the sample moment.

#### **The Supervisors of RMTS Participants will:**

- Receive notification of sample moments not completed by RMTS participants after one business day and follow up with participants to ensure timely completion.
- Receive email notification of sample moments randomly selected for supervisor validation:
  - Log into the RMTS system;
  - Review the program/activity and comments (if any) reported by the participant for the

- sample moment to be validated;
- If the response is appropriate, click Validate/QA, and Exit;
- If the response appears incorrect or incomplete, do not click Validate/QA and instead notify the participant to access the moment (using the original email notification) and make the necessary changes or additions;
- Review amended response and click Validate/QA if appropriate;
- This process must be completed within 4 business days of the moment.

**The RMTS Coordinators will:**

- Monitor DACL-wide RMTS activities and assist in problem resolution; provide technical assistance, reference and resource material, and training when required.
- Ensure that the sample universe is updated quarterly to include new hires and exclude terminations and transfers.
- Work with the Agency Fiscal Management Office to ensure the necessary information is received for the preparation of reports.
- Analyze, edit, and run the sample results reports and prepare information for dissemination for management purposes from the automated RMTS system.
- Review and update the Cost Allocation Plan for Random Moment Time Sampling (RMTS) as necessary.
- Review RMTS responses for accuracy and follow-up with participants and supervisors to ensure the most accurate program and activity code has been selected based on the participant's description of her/his activity in the comments field of the online observation form.
- Ensure a 10% sub-sample of observations is validated by supervisors of staff participating in the RMTS.

# ***RMTS Participant Instructions***

## ***Instructions for Participants Completing the Observation Form***

***Effective October 1, 2017***

### **e-SivicMACS RMTS Instructions**

#### **Random Moment Time Study (RMTS)**

- Approved time recording method required for DACL to claim federal reimbursement
- Identifies time and effort allocated to federal and District programs
- Accuracy and timeliness of responses is very important

#### **Moment Timeline**

- Each notification is sent in a separate e-mail and must be responded to individually
- Observation e-mail will be received 0-2 minutes before the moment
- Observation e-mail includes a hyperlink to e-SivicMACS log-in screen. Your Login is your Participant/Employee ID that is sent to you in the same e-mail as the hyperlink.
- If moment is not completed, a reminder is sent to the Participant and Supervisor after 1 business day.
- Observation (Moment) expires 2 business days after the moment and cannot be accessed

#### **e-mail Notification**

- Sent from [DCOARMS@sivicsolutions.com](mailto:DCOARMS@sivicsolutions.com) (NOTE: Be sure this address is on your e-mail safe list)

#### Sample Email

Hello Participant:

You were selected for random moment sampling at 11:00 AM (EST) on Wednesday, December 27, 2017.

- 1) Click on the RMS web link below to access your internet sample observation form.
- 2) The initial screen is a sign-on for the entry of your employee ID, which is provided below.
- 3) After the RMS form is displayed, select a program and an activity, using the drop down menus.
- 4) Record your comments, describing the activity being performed at the sample moment or training attended.
- 5) If working with a client, enter the ID and name or case name.
- 6) Click Save and Exit to complete your sample observation.

You will have only 2 business days from the Moment date/time to access the observation form.

If you have difficulty or questions in completing your sample observation form, please contact the RMS Administrator immediately  
by telephone (1-877-916-3222) or email ([DCOAsupport@SivicSolutionsGroup.com](mailto:DCOAsupport@SivicSolutionsGroup.com)).

PLEASE DO NOT RESPOND TO THIS E-MAIL.

Employee ID: 00012345

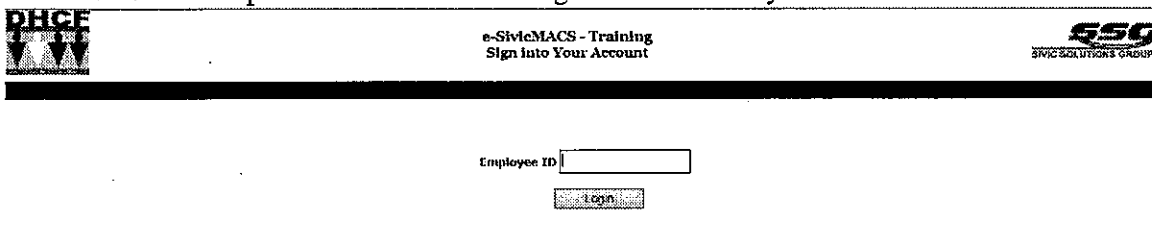
Observation ID: 9970

[Observation Link](#)

Thank you,  
RMTS Administrator

### System Access

- Enter Participant/User ID and click Login to access the system.

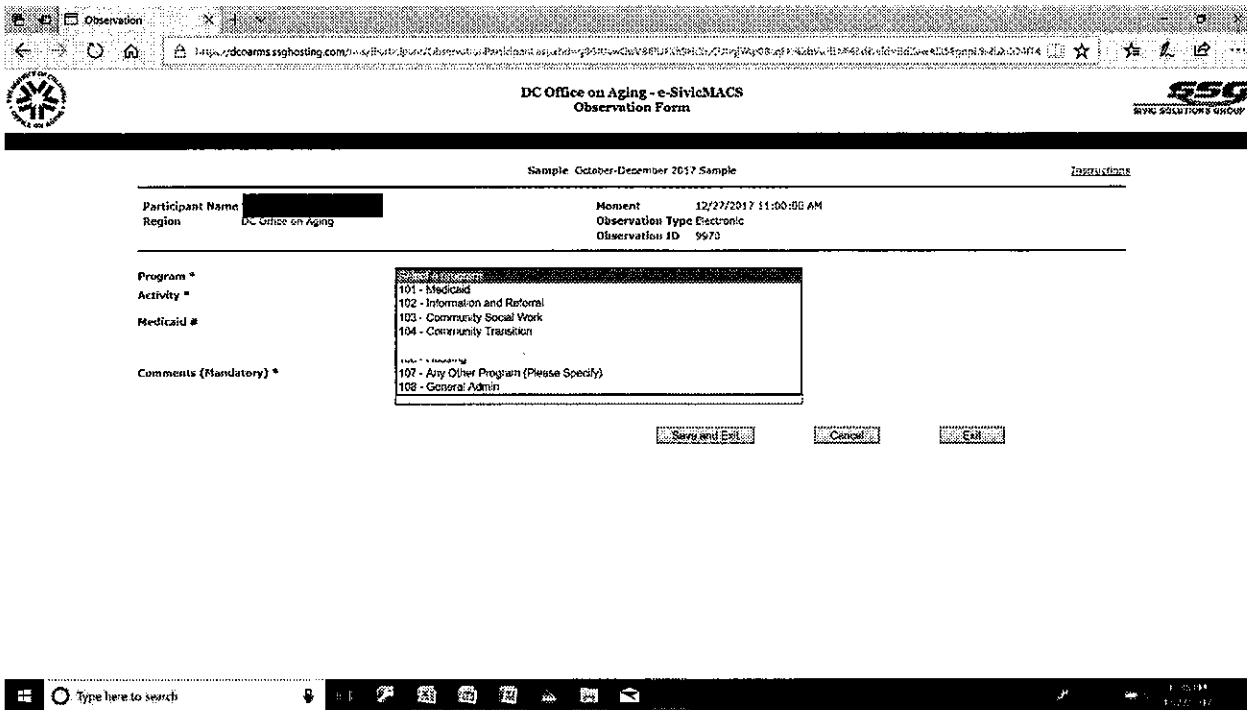


The screenshot shows a login interface for 'e-SivieMACS - Training'. At the top left is the DHCF logo, and at the top right is the ESO logo. The central text reads 'e-SivieMACS - Training Sign into Your Account'. Below this is a horizontal line, followed by a text input field labeled 'Employee ID' and a 'Login' button.

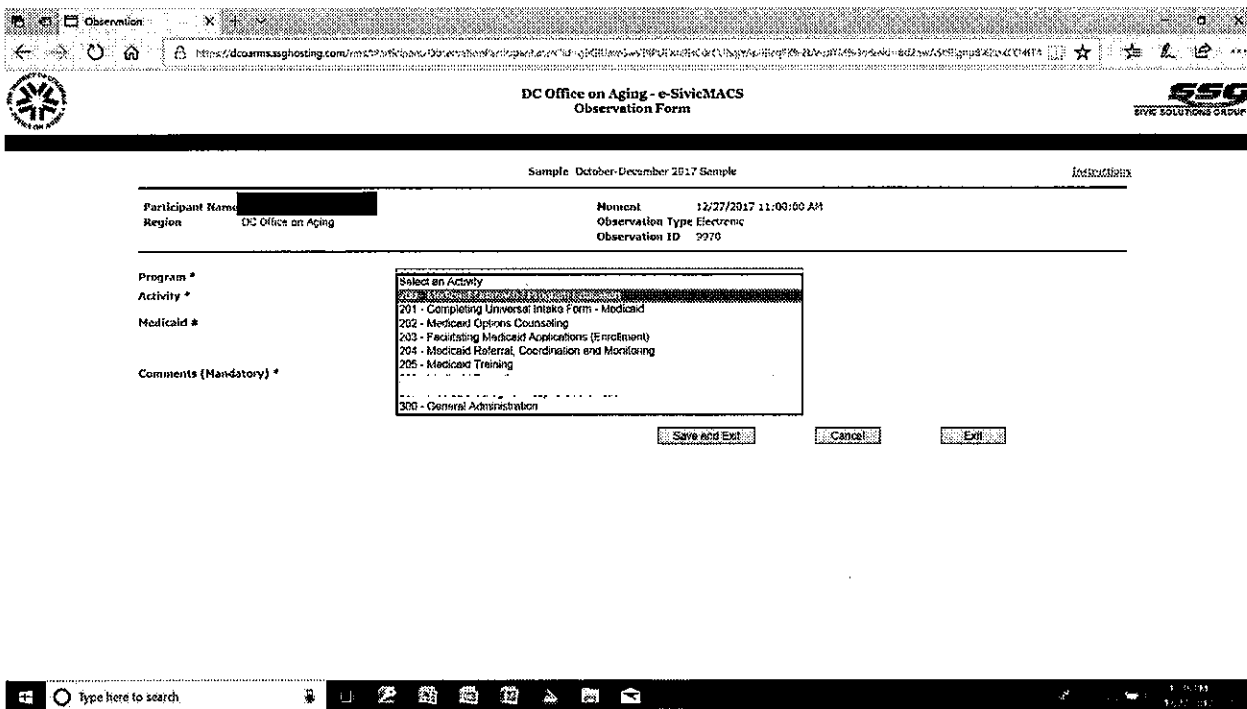
### Complete Observation Form

- Complete the following fields as they relate to your specific moment Date/Time
  - ✓ Program
  - ✓ Activity
  - ✓ Client ID/Medicaid#
  - ✓ Comments

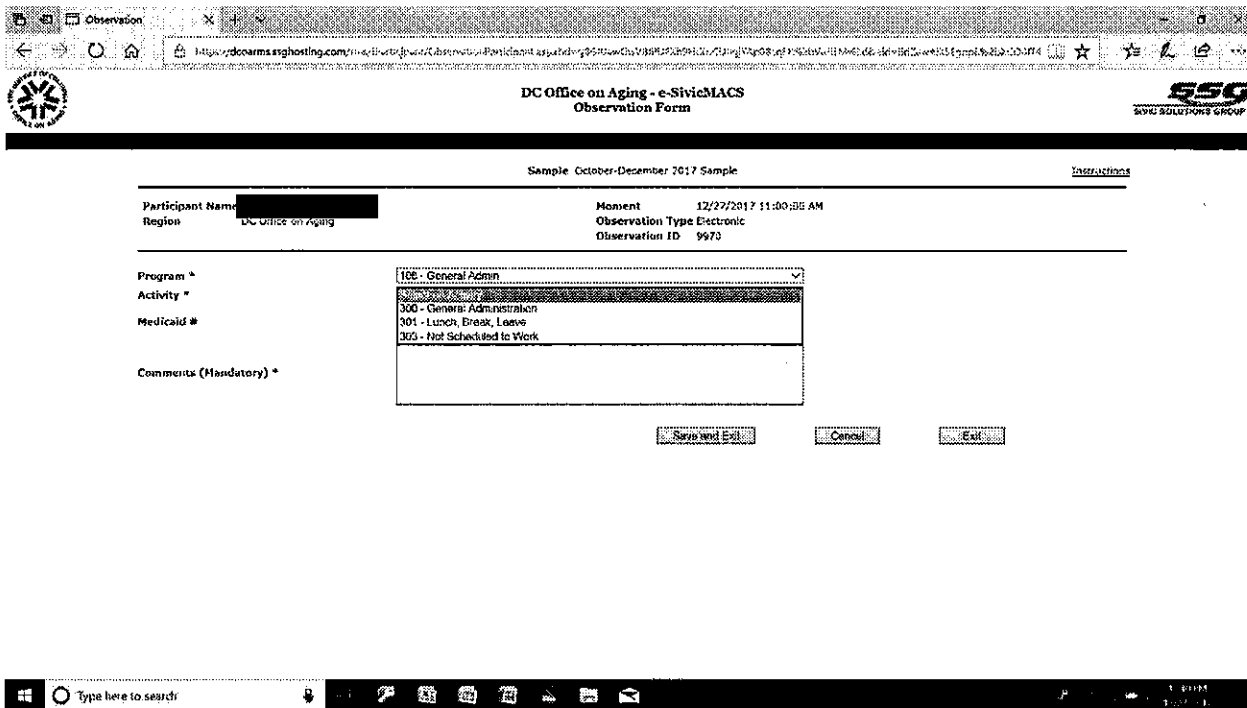
Selection of a program codes is illustrated in the following screenshot.



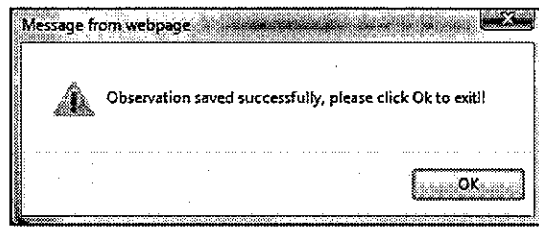
The Activity selections that appear will vary depending on the Program that is selected. For example, if the Medicaid Program code is selected, the following Activity codes will appear for selection,



However, if the General Admin Program code is selected, the following Activity codes will appear for selection.



- After completing the moment, click “Save and Exit”. Then click “OK”



Note that if you attempt to access the internet observation form after 2 business days, the sample moment has expired, and you will receive the following message.

Observation expired!!

Employee ID:



**IF YOU HAVE QUESTIONS:**

- **Live Support: 8am – 5pm eastern time**
- **By Phone:**
  - ✓ Toll Free: 1-877-916-3222
- **By e-mail: [DCOAsupport@sivicsolutionsgroup.com](mailto:DCOAsupport@sivicsolutionsgroup.com)**

## *Appendix 1*

### *DACL Claiming Process*

The narrative delineates the administrative costing/claiming process used by the DC Department of Aging and Community Living.

- Step 1. Total Expenditures for DACL are collected from SOARS system
- Step 2. Expenditures are converted from accrual basis to cash
- Step 3. Eliminate Direct Client Service expenses
- Step 4. Eliminate Unallowable costs
- Step 5. Review the Total Allowable Administrative Expenditures by Major Organizational Unit
- Step 6. Amend any identified costs during Step 5 that are not included in the base
- Step 7. Identify the allocation statistics for each Major Organizational Unit
- Step 8. Apply the allocation statistics (e.g., RMTS results, certified 100% to a Program, FTE Distribution) to the organizational unit
- Step 9. Compile all organizational units' allocations to DACL benefiting programs

Presently, the agencies within the District Government must utilize the "SOAR" system (SOAR) for budgeting, planning, accounting, procurement, reporting and financial control activities.

Since DACL's accounting is performed by SOAR, calculation of the costs under this plan, in most instances, will be based on the SOAR reports. The process begins with actual expenditure data identified in the City's accounting information system (SOAR). All District agencies use the SOAR information system to identify and document their costs. Various internal and external auditors, to assure the propriety of this system, continuously review the SOAR information system. The system provides for the following basic elements:

- General Ledger Account Structure
- Revenue Object Structure
- Expenditure Object Structure
- Organizational Structure
- Function Structure
- Program Structure
- Appropriation Structure
- Grant Structure
- Project Structure
- Other Elements
- Account Code Structure and Crosswalk Summary

Data from the SOAR's reports are then converted from accrual to cash in order to segregate the expenditures to their proper fiscal years for claiming purposes. One-fourth of the value of the District-wide central service costs, as shown on the approved Cost Allocation Plan, are added on a quarterly basis to the DACL's costs as shown on the SOAR reports. In addition, allowable intra-district activities, which are charged to the Department from other District agencies, are properly added to the Department's cost structure and identified for claiming on specific grants or as administrative costs. At this point, the total costs associated with the operation of DACL are known.

The next step is to identify the value of "Subsidy and Transfer" obligations supporting direct program operations (e.g., medical provider payments, etc.). Within the accounting system Object class "50" is used to identify these types of direct payments and remove them from the administrative cost pool. On an annual basis, Object class "50" expenditures account for approximately two-thirds of the total costs of the Department.

The next step is to identify the value of Contractual Service payments that are reimbursed under the terms of the award, either directly or as "maintenance" payments, and to eliminate them from the administrative cost pool. Object class "40" – Contractual Services payments are then sorted and examined to determine if these expenditures are:

- 1 Properly classified as administrative contractual services and not direct services. This involves, in many cases, a close examination of the actual contracts.
- 2 Properly classified in the correct fiscal year.
- 3 Allowable under Circular OMB A-87 now located at 2 CFR Part 200.
- 4 Allowable under applicable program rules.

An examination of all personnel costs is then undertaken to 1) identify those personnel costs that are considered "direct" in nature and assigned to a specific projects and 2) to identify any unallowable personnel service costs as defined by OMB Circular A-87 now located at 2 CFR Part 200. These costs are then removed from the cost pool.

In a similar manner, all non-personnel costs (NPS) such as office supplies, printing, travel, etc. are examined and, as with the above mentioned personnel costs:

- Direct NPS costs (i.e., those that are reimbursed under the terms of the award) are removed from the pool
- Any unallowable NPS costs as defined by OMB Circular A-87 now located at 2 CFR Part 200 are then removed.

At this point, all allowable administrative costs incurred in support of the direct programs conducted by DACL by organizational unit have been identified. These are then allocated to the various benefiting funding sources (i.e., Federal grant program or District fund sources) based on the allocation processes identified in the Nature and Extent of Services Section of the PACAP.

For example, starting at the top of the organizational chart, the Director of the Department is responsible for all aspects of the Department. The PACAP indicates that the allowable costs this office will be allocated to those offices reporting to it based on FTE's. Therefore, a percentage of staff associated with each of the Administrations reporting to the Director to the total staff of these Administrations is computed. These percentages are then applied to the total allowable costs of the Office of the Director and assigned to each of these individual Administrations.

Costs reallocated to the second level (i.e., major Administration) are then added to the costs of the individual offices at that level and are then reallocated based on the results of the Random Moment Time Sample (RMTS). It should be noted that where individuals working on specific, discretionary grant awards they will be identified and the salary and fringe benefits for those staff extracted from the costs to be allocated via the RMTS. The salary and wages of these staff will be identified and documented in accordance with OMB Circular, Attachment B, Paragraph 8.h.

The RMTS has been developed in conformance with the requirements of the "Guide for Public Assistance Cost Allocation Plans". The sample is based on current payrolls and coupled with randomly selected moments. The sampled employees are provided a copy of the "observation" form (see Attachment A) and are requested to identify what program and activity they are working on at the selected moment. Approximately 2,300 "sample observations" are generated every quarter. The programs and activities are defined and the staff subject to the RMTS has been provided a copy of this document (see the Random Moment Time Study Sampling Plan).

At the end of each quarter, the completed observation forms are tabulated and used to identify the relative effort (expressed as a percent) associated with the programs supported by the Department. The individual percentages are then applied to the allowable costs (see above) to identify the costs by program. The final results of these allocations are then used to populate the respective quarterly reimbursement claim forms.

Costs assigned to specific programs may be subject to other requirements. Where this occurs, the claiming process will reflect these requirements.

## *Appendix 2*

**District of Columbia**

# **SOAR (R\*STARS) Accounting System Summary**

## *SOAR (R\*STARS) Accounting System*

Presently, the agencies within the District Government must utilize SOAR for budgeting, planning, accounting, procurement, reporting and financial control activities. Since the Department of Health Care Finance accounting is performed by SOAR, calculation of the costs for this plan, in most instances, will be based on the SOAR reports.

The Relational Standard Accounting and Reporting System (formerly R\*STARS, currently SOAR) is a comprehensive financial management information system designed to meet the sophisticated accounting and reporting needs of large and small state agencies. The system was designed to comply with the accounting requirements imposed on local governments by the American Institute of Certified Public Accountants (AICPA) and the Government Finance Officers Association (GFOA).

This appendix presents a summary of the SOAR system in the following areas:

- Fund Structure
- General Ledger Account Structure
- Revenue Object Structure
- Expenditure Object Structure
- Appropriation Structure
- Program Structure
- Function Structure
- Organizational Structure
- Project Structure
- Grant Structure
- Other Elements

## 4-1 DATA CLASSIFICATION STRUCTURE

### What is a Data Classification Structure?

A data classification structure is a reporting-oriented vehicle in an accounting system which defines and groups accounting information for data-capturing and reporting purposes. After these elements are input into the accounting system, they can be summarized to provide financial management information, such as total tax revenue collected by the state, payments made on a particular bond issue, the amount of appropriations expended and/or encumbered by a given agency and so on.

### How is the R★STARS Data Classification Structure Organized?

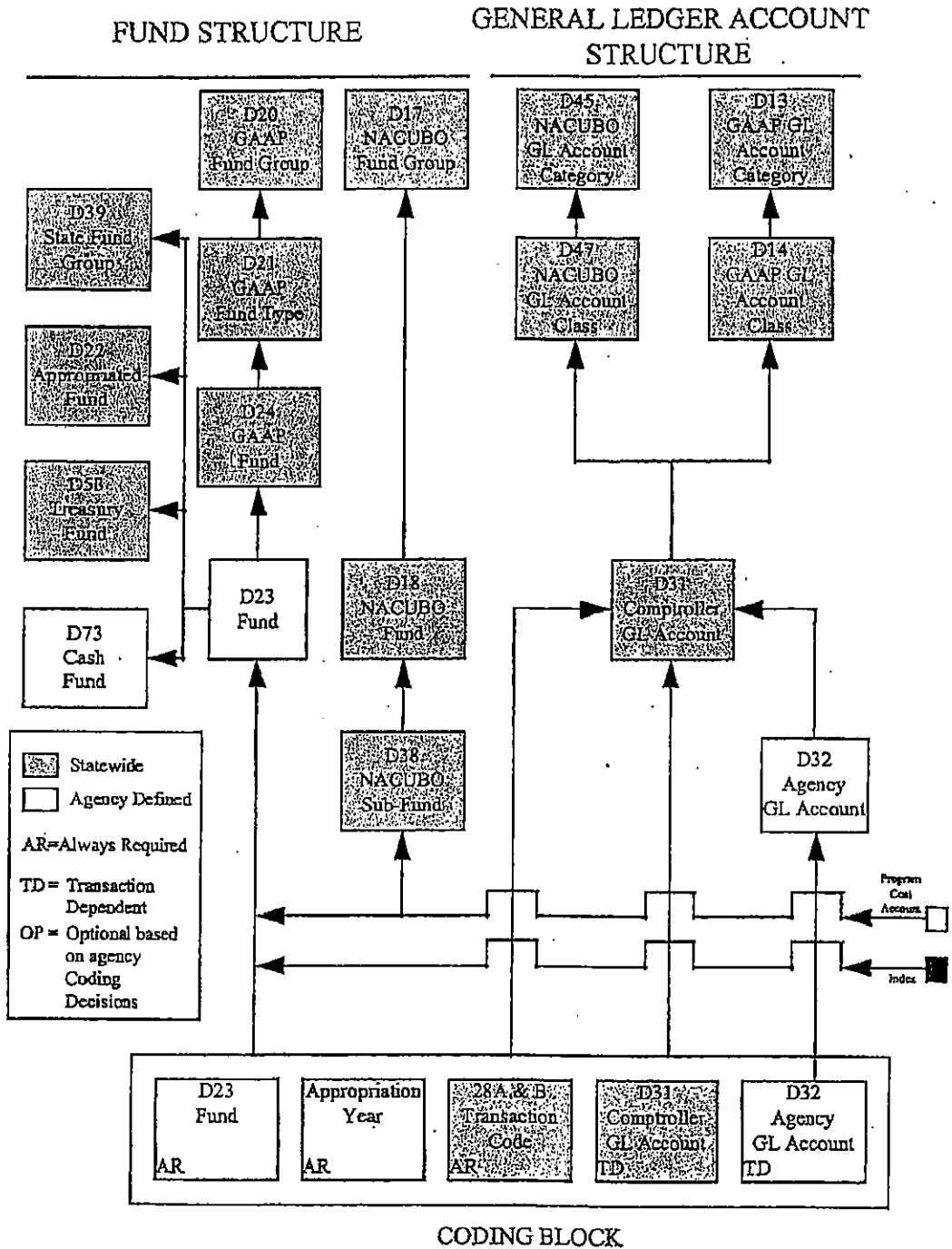
The proposed R★STARS data classification structure is organized into ten major areas. These major areas include:

- Fund Structure
- General Ledger Account Structure
- Revenue Object Structure
- Expenditure Object Structure
- Appropriation Structure
- Program Structure
- Function Structure
- Organization Structure
- Project Structure
- Grant Structure

These structures are necessary to meet functional, legislative, Generally Accepted Accounting Principles (GAAP) and National Association of Colleges and Universities Business Officers (NACUBO) accounting and reporting requirements.

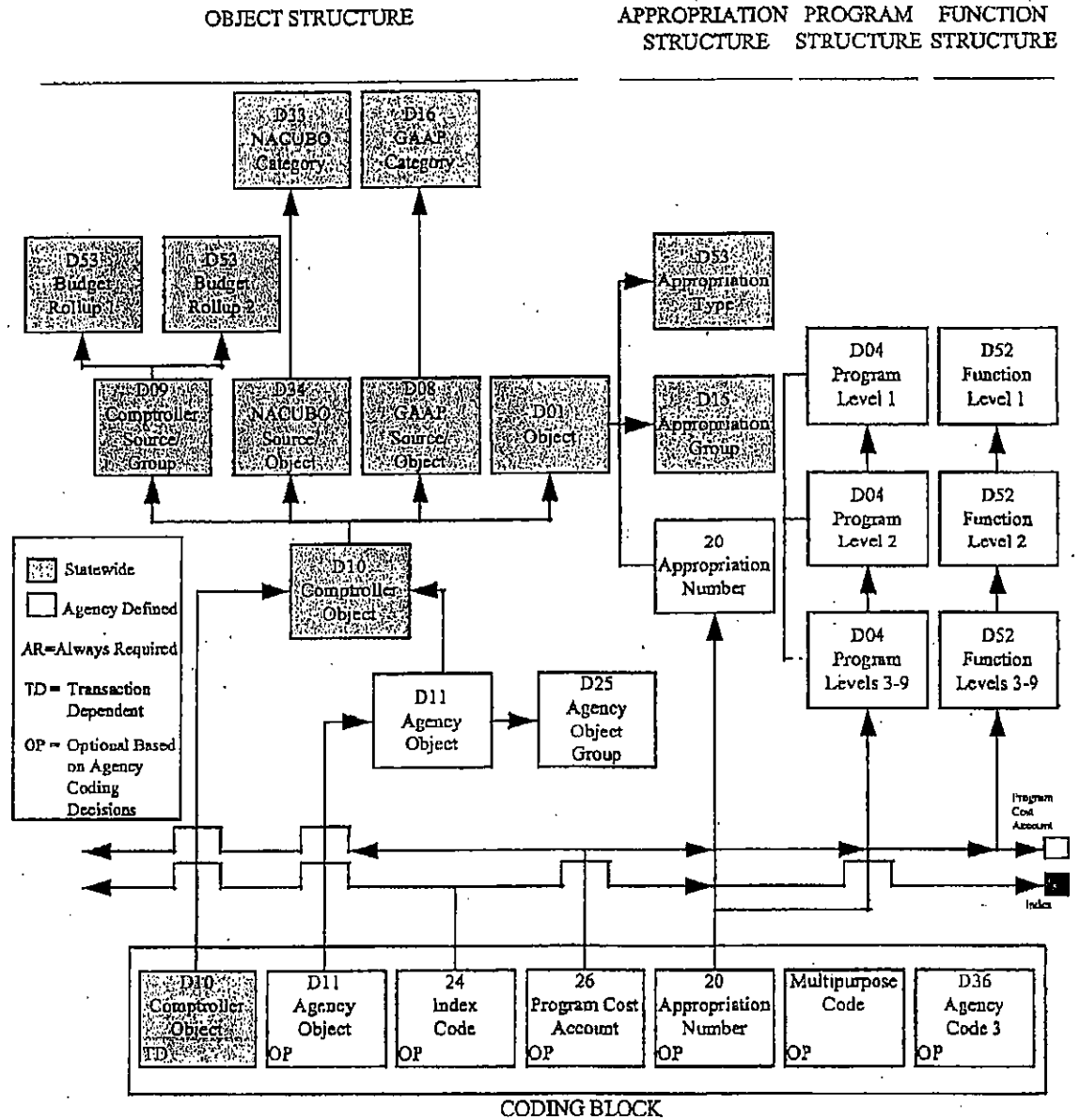
The following pages describe each major area in the classification structure and the data elements that form the structures. These elements represent the kinds of information that will be reported by R★STARS. Keep in mind that not all of these classification elements will be entered. The elements that are entered will reference (or infer) the other elements in the classification structure through various profiles. A summary of the classification structure and coding block is illustrated on the next few pages.

## DATA CLASSIFICATION STRUCTURE



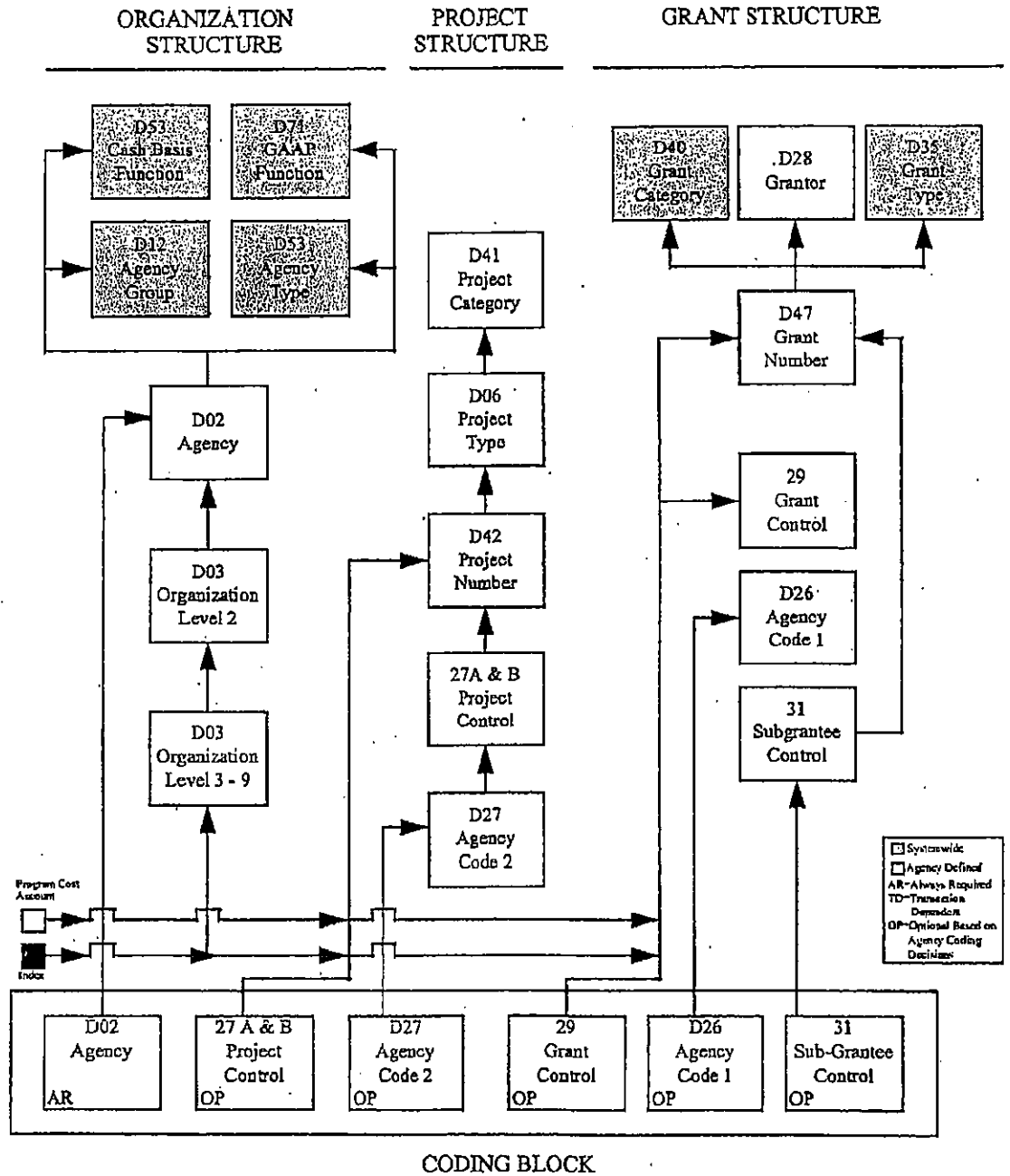


## DATA CLASSIFICATION STRUCTURE



Reference Manual  
Classification Structure

## DATA CLASSIFICATION STRUCTURE



## Fund Structure

The fund structure incorporates two distinct components into its framework. The first is the state fund structure which allows R★STARS to capture appropriated fund activity for the legislature. The second component is the GAAP fund structure which allows R★STARS to report funds in accordance with GAAP. To achieve this dual structure, R★STARS makes use of an agency-defined fund number which references the appropriated fund and the GAAP fund.

Institutions of higher education will use this structure for the appropriated funds, but not the GAAP component. Instead, institutions will use the NACUBO fund structure to track their GAAP activity. See the NACUBO fund structure for more information on this subject.

The fund number may be inferred by the index, by program cost account (PCA) or it may be entered. All other data elements in the fund structure are referenced by profiles.

### Definitions

**Fund** - the lowest level in the fund structure. This number may be assigned by the individual agencies and institutions of higher education to serve their internal accounting needs. The D23 Fund Profile will then infer (or reference) the appropriated fund, cash fund and the GAAP fund.

**Treasury Fund** - establish to track an entity's banking activity if the treasury functions as a banking entity within the state.

**Appropriated Fund** - established for the purpose of accounting for specific activities or the attainment of certain objectives in accordance with legislative acts, special regulations, restrictions or limitations. Examples are general fund capital construction, other funds non-limited and federal funds capital improvement.

**Cash Fund** - used to establish a cash control level which is lower than an appropriated fund but higher than the agency fund.

**Agency Fund Group** - established for the purpose of meeting cash control requirements which are above the agency fund level but below the statewide appropriated fund level.

**State Fund Group** - established for purpose of grouping funds so they may be summarized in a manner other than appropriated fund or GAAP fund. State fund groups facilitate accumulating fund information across agency lines for purposes other than budgetary or GAAP.

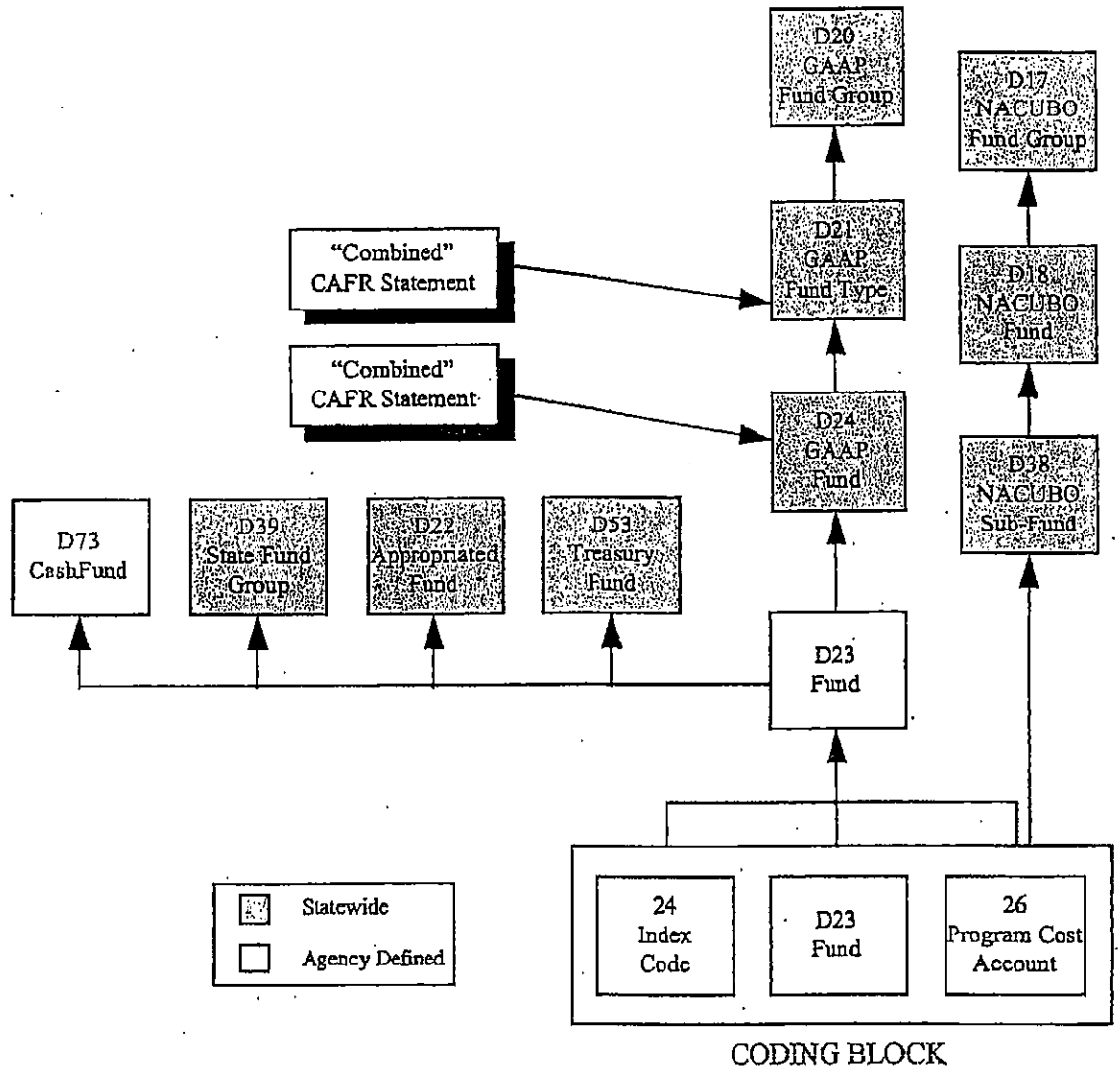
**GAAP Fund** - represents the fund that is used in the annual GAAP basis Comprehensive Annual Financial Report (CAFR). These designations provide the capability to consolidate funds for reporting purposes (for the combining statements). Examples are highway fund, workers comp insurance fund and human services fund.

**GAAP Fund Type** - refers to the major fund types and account groups set forth in the Codification of Governmental Accounting and Financial Reporting Standards (GASB Codification), Section 1300.104. Examples are general, special revenue and general fixed assets account group.

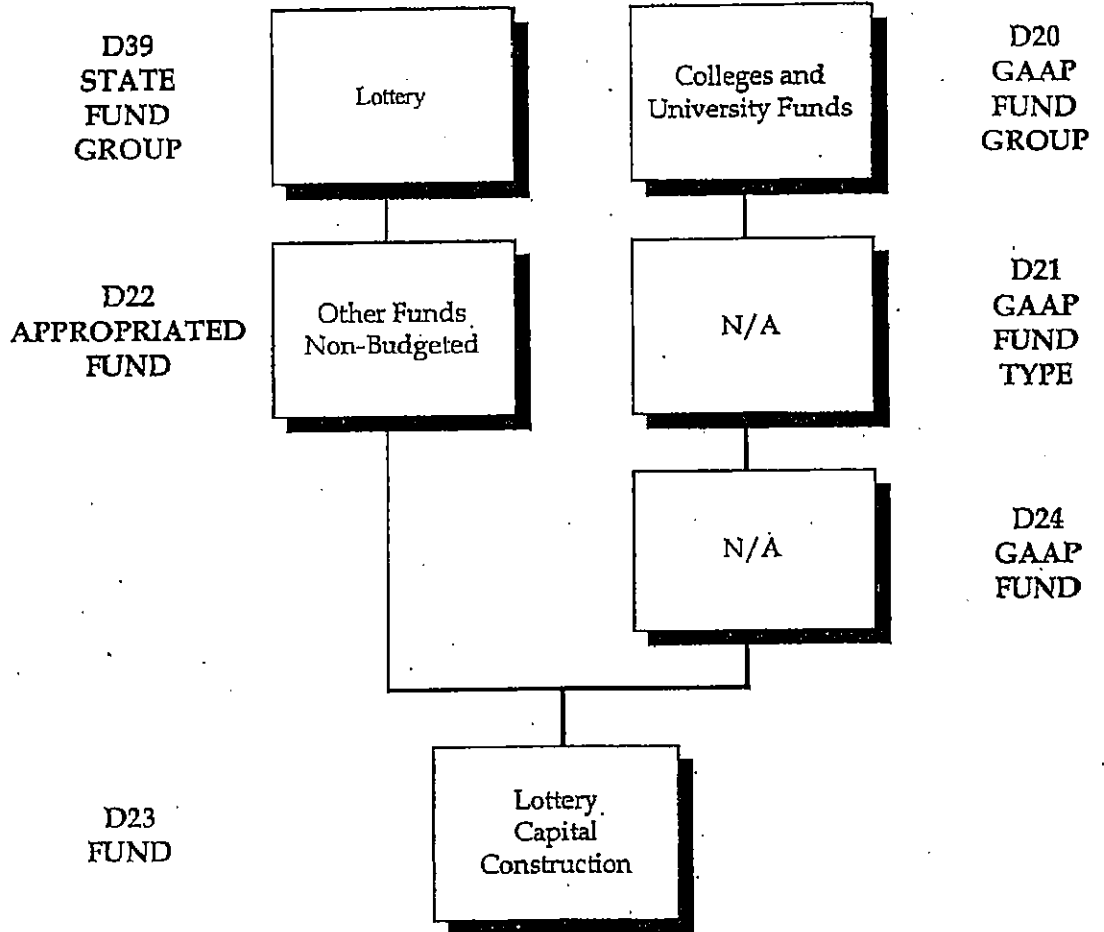
**GAAP Fund Group** - represents the fund categories shown in the GASB Codification (e.g., governmental funds, proprietary funds, fiduciary funds and account groups). Each GAAP fund type will be assigned to a GAAP fund group. For the purpose of compiling the GAAP basis Comprehensive Annual Financial Report (CAFR), GAAP fund types of colleges and universities will be consolidated into an additional GAAP fund group called colleges and universities.

The R★STARS fund structure is illustrated in the following exhibits.

## FUND STRUCTURE



## FUND STRUCTURE HIGHER EDUCATION EXAMPLE



### NACUBO Fund Structure

The NACUBO fund structure is used by institutions of higher education to track fund activity and balances according to NACUBO standards.

The NACUBO fund and subfund must be inferred by the PCA. The NACUBO fund group is referenced (or inferred) by the D18 NACUBO Fund Profile.

## Definitions

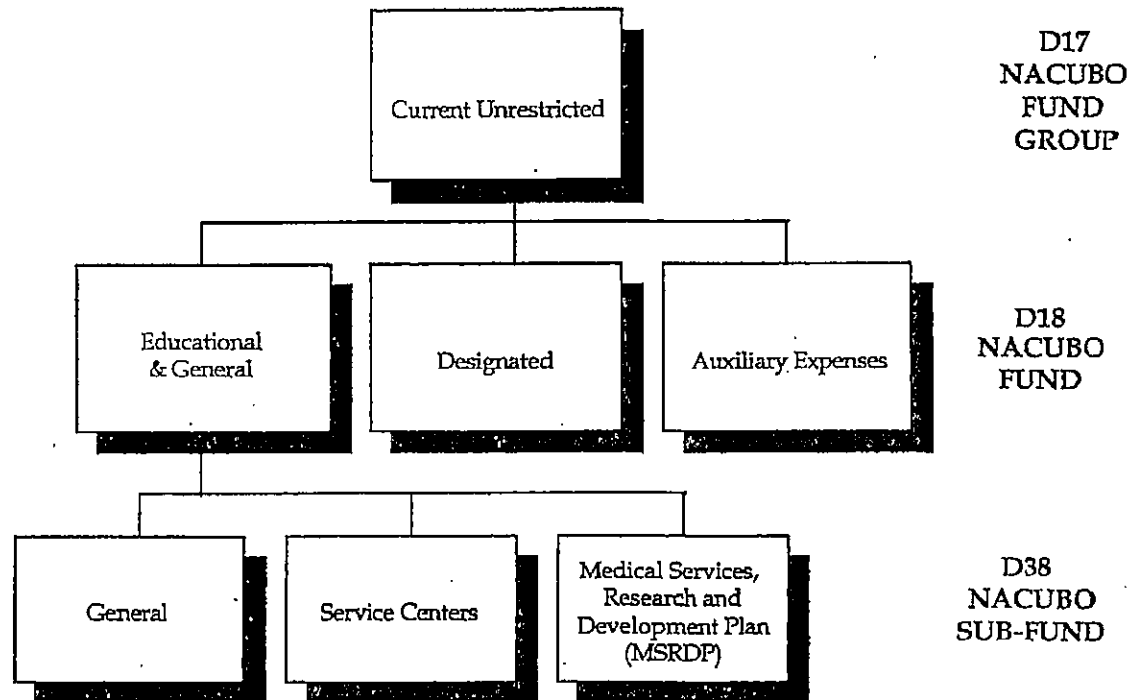
**NACUBO Subfund** - refers to the lowest level of fund classifications required by institutions of higher education and may be independently defined by each institution. For example, sub-funds within education and general could be general, service centers and medical services, research and development plan (MSRDP) or within auxiliary enterprises could be pledged and non-pledged.

**NACUBO Fund** - refers to fund classifications delineated in the state comptroller of public accounts Annual Financial Reporting Requirements for Colleges and Universities. These standards are in conformance with NACUBO as set forth in College and University Business Administration (CUBA). Examples include investment in plant, renewals and replacements, educational and general, designated and auxiliary enterprises. This classification is required to produce financial reports in conformance with NACUBO.

**NACUBO Fund Group** - refers to the fund groups defined in the state comptroller of public accounts Annual Financial Reporting Requirements for Colleges and Universities. As the name implies, this is a grouping of NACUBO Funds. For example, the NACUBO fund group, plant funds, is comprised of the NACUBO funds - unexpended plant funds, retirement of indebtedness, investment in plant, renewals and replacements.

These standards are in conformance with NACUBO as set forth in CUBA. An example of a NACUBO fund structure is illustrated on page 4-11.

## NACUBO FUND STRUCTURE



### General Ledger Account Structure

Like the fund structure, the general ledger account structure is split into two components. However, instead of requiring separate components for GAAP and state, the general ledger account structure draws a dividing line between GAAP reporting requirements and NACUBO reporting requirements. GAAP applies to state agencies, while NACUBO applies to institutions of higher education.

The focus of these two components is in reporting and not accounting. Data can be entered for both agencies and institutions of higher education using the same general ledger accounts because their accounting events are not substantially different. When they are, it is a simple matter to add accounts for transactions specific to colleges and universities or agencies. The real difference between GAAP and NACUBO is in the reporting requirements of each. These differences are reflected at the account class and account category levels within the general ledger account structure.



In addition to supporting generally accepted accounting principles, the GAAP component is used to facilitate the general ledger account groupings on the systemwide cash basis reports. Groupings for general ledger accounts are fundamentally the same for GAAP and cash basis reports with the primary difference being the accruals used in GAAP.

Usually, the comptroller general ledger account is inferred by the transaction code (T-Code). However, if the T-Code provides only one side of the general ledger entry (e.g., debit or credit), the account for the other side must be entered. In some cases, an agency general ledger account will infer the comptroller general ledger account. All other elements in the general ledger account structure are referenced by profiles.

## Definitions

**Agency General Ledger Account** - usually an *optional* level of detail below the systemwide General Ledger Account. An agency may require this lower level of detail if the agency is using R★STARS for internal accounting and reporting. Also, agencies with their own internal accounting system might want to use such a data element to make the coding of vouchers and reconciliation of their system to R★STARS easier.

In most cases T-Codes infer the general ledger account. Only where the general ledger account is required on input does an agency general ledger account infer the general ledger account. Additionally, there are certain situations where agency general ledger account is not an optional level of detail but is required and defined at the systemwide level. An example would be transactions affecting the Fixed Asset Subsystem or due to/due from accounts.

**Comptroller General Ledger Account** - the lowest level of the general ledger account structure for *systemwide accounting purposes*. Examples are cash on hand, investments - designated, accounts receivable - federal-billed.

**GAAP General Ledger Account Class** - a grouping of general ledger accounts. General ledger account classes will appear as line items on the GAAP basis financial statements produced by R★STARS. Examples include cash, investments, accounts.

**GAAP General Ledger Account Category** - a grouping of GAAP general ledger account classes. This data element is the highest level of the general ledger account structure required for GAAP reporting. Examples are current assets and long-term assets.

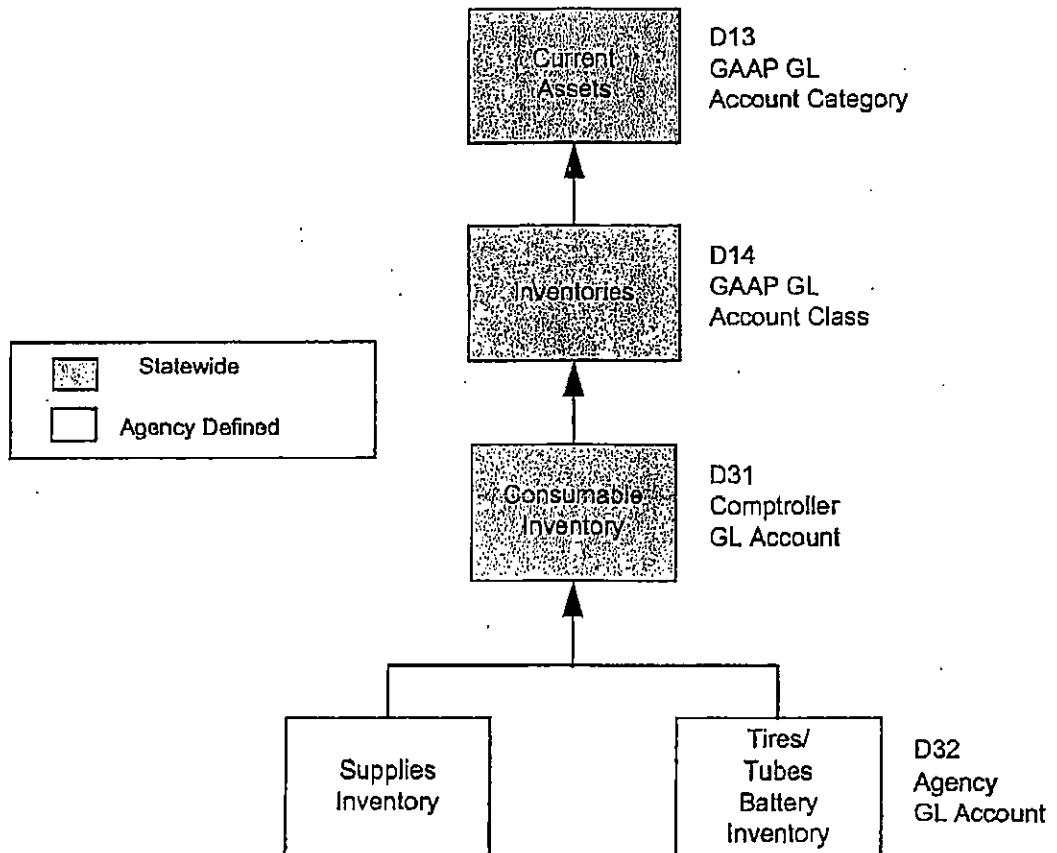
**NACUBO General Ledger Account Class** - a grouping of general ledger accounts. NACUBO general ledger account classes will appear as line items on the college and university financial statements produced by R★STARS. Examples include cash, investments, plant and equipment and net investment in plant.

**NACUBO General Ledger Account Category** - a grouping of NACUBO general ledger account classes. This data element is the highest level of the general ledger account structure required for college and university reporting. Examples are assets, plant and equipment, liabilities and fund balance.

General ledger transactions for colleges and universities must flow through both the GAAP and NACUBO general ledger account structures.

The proposed R★STARS General Ledger Account structure is illustrated on the next two pages. The GL account structure-Agency Exhibit demonstrates the flow of information for agencies (excluding institutions of higher education). Non-higher education agencies are not affected by NACUBO reporting requirements so their data flows only through GAAP groupings. The GL Account Structure-Higher Education Exhibit demonstrates the flow of higher education data through both the GAAP and NACUBO structures.

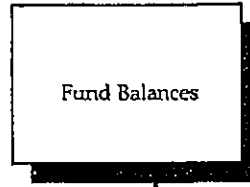
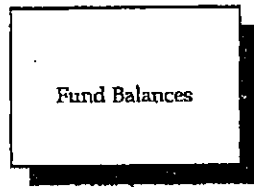
## General Ledger Account Structure Example



## GENERAL LEDGER ACCOUNT STRUCTURE

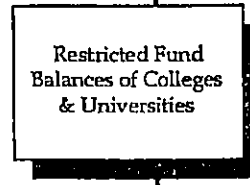
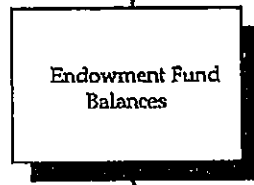
### HIGHER EDUCATION EXAMPLE

D45  
NACUBO GL  
ACCOUNT  
CATEGORY

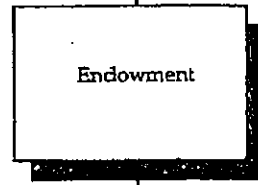


D13  
GAAP GL  
ACCOUNT  
CATEGORY

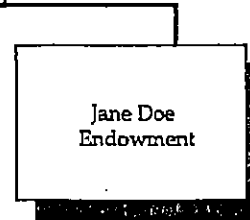
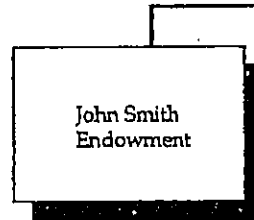
D46  
NACUBO GL  
ACCOUNT  
CLASS



D14  
GAAP GL  
ACCOUNT  
CLASS



D31  
COMPTROLLER  
GL ACCOUNT



D32  
AGENCY GL  
ACCOUNT  
(Optional)

### Object Structure (Revenue)

The revenue object structure is similar to the general ledger account structure in that there is a GAAP component and a NACUBO component. Comptroller revenue objects are grouped into comptroller, GAAP and NACUBO revenue sources.

A major difference between the general ledger account structure and the revenue object structure lies in the flexibility of the agency revenue object. Recall that in the general ledger account structure, the agency account is more detailed than the systemwide account. The agency revenue object, however, may be more detailed, the same or less detailed than the comptroller revenue object used systemwide.

Let us assume that an agency records its accounting events in more detail than the comptroller object. For example, the agency objects, Building Use/General Fees and Student Service Fees, might be used by a university for its internal accounting needs, but at the systemwide level, only one object code is required, College and University Student Fees (see Page 4-17). In this example, the agency could enter its agency object only and the D11 Agency Object Profile would reference the comptroller object.

Another example is an agency needs less detail for its internal accounting and reporting than is required at the systemwide level. To illustrate, an agency object called "Recovery of Indirect Costs" may apply to two comptroller objects, "Federal Receipts - Earned Credits" and "Earned Federal Funds - Food Stamp Recoupment".

In this example, the agency *must* enter the comptroller object (to provide consistent data at the systemwide level). Additionally, the agency *may* enter its own agency object, if desired. Although this situation increases the key strokes for data entry, it adds flexibility to the system both for on-line users, as well as agencies with their own internal accounting systems who might want to use the agency object to make the coding of vouchers and reconciliation of their system to R★STARS easier.

An additional data element, agency object group, is available to agencies who wish to group their agency objects differently than the comptroller, GAAP or NACUBO revenue source.

Depending on the account structure of the agency or institution, the agency has two options for recording transactions against *both* the comptroller and agency object:

If the agency object level is more detailed than or the same as the comptroller object:

1. Enter the *agency object only*. The D11 Agency Object Profile will reference the agency object group and the comptroller object. The comptroller object will then reference all other elements in the object structure.

or

If the agency object is less detailed than the comptroller object:

2. Enter the *comptroller object* (to provide consistent data at the systemwide level) *and* enter the *agency object*. (The comptroller object field is blank on the D11 Agency Object Profile).

Note that the input coding block on data entry forms and screens contain generic fields for comptroller object and agency object. Either revenue or expenditure object codes may be entered in these fields.

## Definitions

**Agency Object (Revenue)** - code available for agencies to use for accumulating and reporting revenue financial information. The agency object may be more detailed, the same or less detailed than the comptroller object as defined by the agency. *Agency revenue object is an optional data element at the statewide level. An agency determines if the agency object for revenues will be required for revenue transactions.*

**Agency Object Group (Revenue)** - code available to group similar agency objects. *Agency object group is an optional data element.*

**Comptroller Object (Revenue)** - the lowest level in the revenue object structure for systemwide accounting purposes. Examples include personal income taxes, park user fees and vehicle licenses.

**Comptroller Source/Group (Revenue)** - a grouping of comptroller objects. Comptroller source groups are used as the first level of reporting for budgetary information.

**Budget Object 2** - a grouping of comptroller source objects that will provide a higher level of reporting for budgetary information.

**Budget Object 3** - a grouping of comptroller source objects that will provide the highest level of reporting for budgetary information.

**Object** - a grouping of comptroller objects used for management purposes. An example is revenues.

**GAAP Source (Revenue)** - a grouping of comptroller objects. GAAP revenue sources will appear as line items on the GAAP basis reports. Examples are taxes, licenses and fines and forfeits.

**GAAP Category (Revenue)** - a grouping of GAAP Revenue Sources. GAAP revenue category is the highest level of the object structure required for GAAP reporting. Examples are revenues, operating revenues and non-operating revenues.

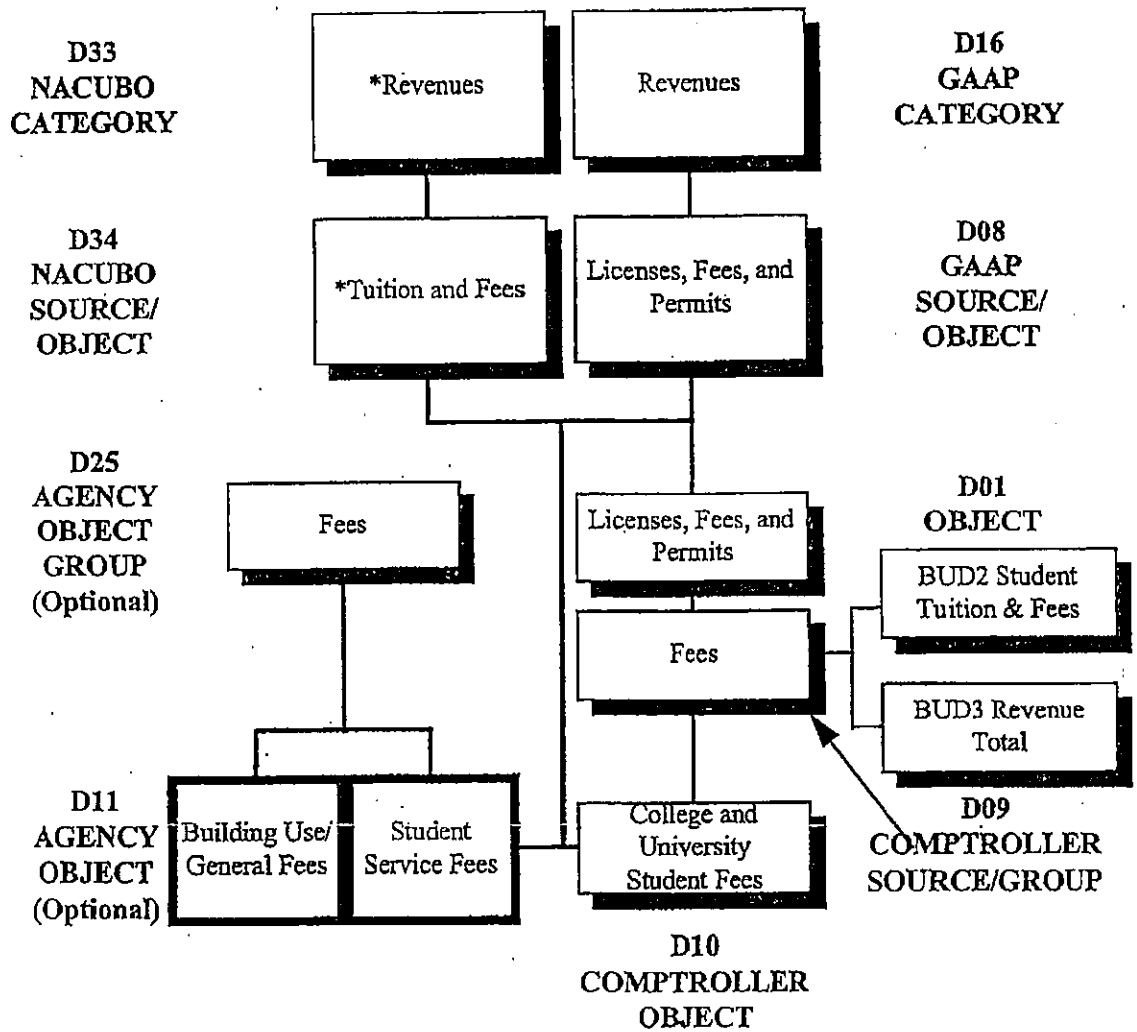
A systemwide object structure is also required for colleges and universities to meet NACUBO requirements.

**NACUBO Source (Revenue)** - a grouping of comptroller revenue object in NACUBO revenue sources will appear as line items on the Statement of Changes in Fund Balances and the Statement of Current Funds Revenues and Expenditures. Examples include tuition and fees, federal Grants and contracts and endowment income.

**NACUBO Category (Revenue)** - a grouping of NACUBO Sources. Category is the highest level of the object structure required for college and university reporting. The primary category used for college and university revenue activity is Revenues.

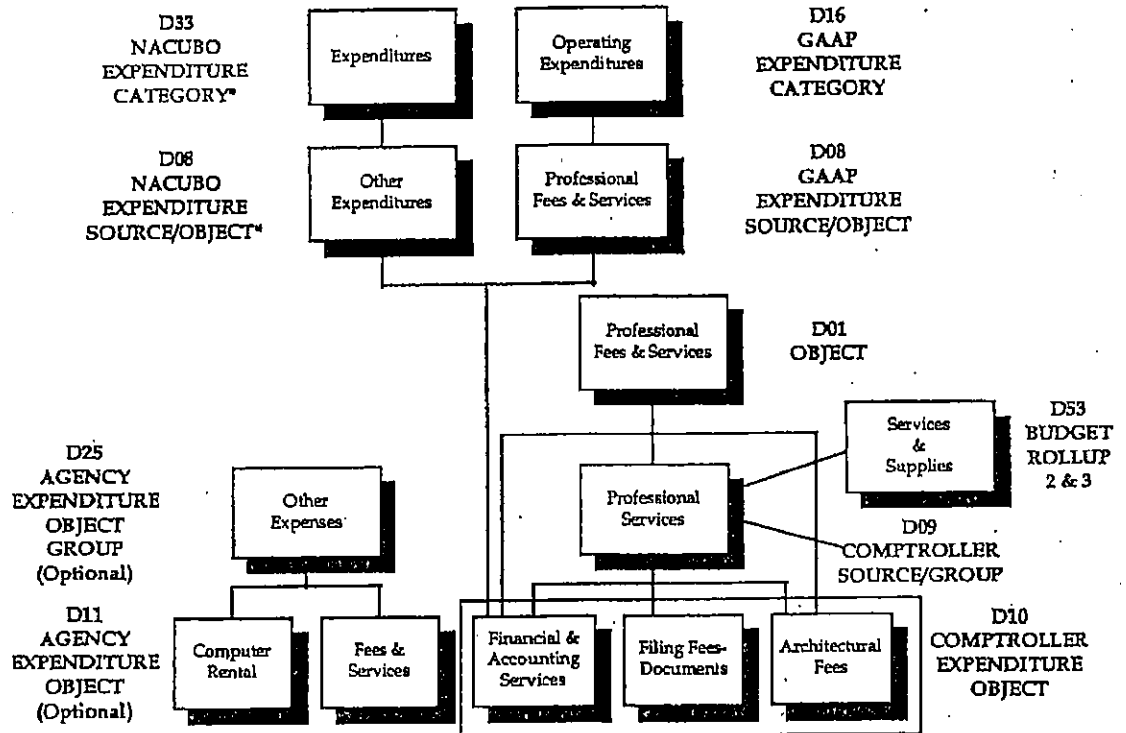
Revenue transactions for colleges and universities must flow through both the GAAP and NACUBO object structures.

### AGENCY OBJECT AT LOWER LEVEL OF DETAIL THAN COMPTROLLER OBJECT



\* Only applies to Institutions of Higher Education.

## AGENCY OBJECT AT HIGHER LEVEL OF DETAIL THAN COMPTROLLER OBJECT



\* Only applies to Institutions of Higher Education.

In order to accomplish this, you would enter a D11 Agency Object with a blank D10 Comptroller Object.

### Object Structure (Expenditures)

The expenditure object structure is very similar to the revenue object structure. There is a GAAP component and a NACUBO component. Comptroller object is the lowest level for systemwide reporting purposes.

The comptroller object group, which is a grouping of comptroller objects, is at the same level as the comptroller source/group. Object is used to group similar comptroller objects for management purposes. The comptroller object is grouped into the GAAP and NACUBO object structures.

The object structure for expenditures has the same flexibility as the object structure for revenues in that the agency object may be more detailed, the same or less detailed than the comptroller object.

To illustrate, assume that an agency records its accounting transactions in more detail than the comptroller object. For example, the agency objects, financial advisory services and bookkeeping services might be used by an agency for its internal accounting needs, but at the systemwide level, only one object code is required, financial and accounting services.

In this example, the agency could enter its agency object only and the D11 Agency Object Profile would reference the comptroller object.

On the other hand, let us assume that an agency needs less detail for its internal accounting and reporting than is required at the systemwide level. To illustrate, an agency object called fees and services may apply to three comptroller objects, financial and accounting services, filing fees - documents and architectural fees.

In this example, the agency *must* enter the comptroller object to provide consistent data at the systemwide level. Additionally, however, an agency *may* enter its own agency object, if desired. Although this situation increases the key strokes for data entry, it also adds flexibility to the system both for on-line users of R★STARS, as well as agencies with their own internal accounting systems who might want to use the Agency Object to make the coding of vouchers and reconciliation of their system to the R★STARS easier.

An additional data element, agency object group, is available to agencies who wish to group their agency objects differently than the systemwide groupings identified above.

Depending on the account structure of the agency or institution, the agency has two options for recording transactions against *both* the comptroller object and the agency object:

If the agency object level is more detailed than or the same as the comptroller object:

1. Enter the *agency object* only. The D11 Agency Object Profile will reference the agency object group and the comptroller object. The comptroller object will then reference all other elements in the object structure.

or

If the agency object is less detailed than the comptroller object:

2. Enter the comptroller object to provide consistent data at the systemwide level *and* enter the *agency object*. (The *comptroller object* field is blank on the D11 Agency Object Profile).



Note that the input coding block on data entry forms and screens will contain generic fields for the comptroller's object and the agency object. Either revenue or expenditure object codes may be entered in these fields.

## Definitions

**Agency Object Expenditures** - an additional code available for agencies to use for accumulating and reporting expenditure financial information at a level determined by the agencies. The agency object may be more detailed, the same or less detailed than the comptroller object as defined by the agency. *Agency object is an optional data element at the statewide level. An agency determines if the agency object element for expenditures will be required for expenditure transactions.*

**Agency Object Group (Expenditures)** - code available for grouping similar agency objects as defined by the agency. *Agency object group is an optional data element.*

**Comptroller Object (Expenditures)** - the lowest level in the object structure for systemwide accounting purposes. Examples include regular employee salaries, temporary employee salaries, academic salaries, overtime payments.

**Comptroller Object Group (Expenditures)** - code available for grouping similar comptroller objects. Examples include classified/unclassified salary/per-diem, temporary appointments or social security taxes.

**Budget Object 2** - a grouping of comptroller object groups that will provide a higher level of reporting for budgetary information. Examples are salaries and wages and other payroll expense.

**Budget Object 3** - a grouping of comptroller object groups that will provide the highest level of reporting for budgetary information. An example is personal services.

**Object (Expenditures)** - a grouping of comptroller objects used for management purposes. Examples include personal services, services and supplies, capital outlay and special payments.

**GAAP Object (Expenditures)** - a grouping of comptroller objects. GAAP Objects will appear as line items on the GAAP basis reports produced by R★STARS. Examples are salaries and wages, services and supplies, cost of goods sold and special payments.

**GAAP Category (Expenditures)** - a grouping of GAAP Objects. GAAP Category is the highest level of the R★STARS expenditure object structure required for systemwide GAAP reporting. Examples are expenditures, operating and non-operating expenditures.

**NACUBO Object (Expenditures)** - a grouping of comptroller objects for universities and colleges. NACUBO objects will appear as line items on the Statement of Changes in Fund Balances and the Statement of Current Fund Revenues and Expenditures. Examples include salaries and wages, other expenses and capital outlay.

**NACUBO Category (Expenditures)** - a grouping of NACUBO Objects. NACUBO Category is the highest level of the R★STARS object structure required for college and university reporting. The primary category used for college and university expenditure activity is expenditures. Expenditure transactions for colleges and universities must flow through both the GAAP and NACUBO Expenditure Object Structures.

Non-higher education agencies are not affected by NACUBO reporting requirements, so their data flows only through GAAP groupings.

## Appropriation Structure

The following appropriation pattern is used to illustrate the appropriation structure:

### AGENCY 123

I. Administration and Support:	
A. Executive Administration	\$100,000
B. Planning and Research	22,000
C. Support Operations	10,000
II. Examinations and Supervision	30,000

Appropriation number identifies each budgeted line item in the General Appropriations Act and is the lowest level in the structure. Appropriations can then be grouped by the appropriation group level or by type (e.g., construction or operating) at the appropriation type level.

The appropriation number may be inferred by the index, PCA or it may be entered. Appropriation group and appropriation type are referenced by the 20 Appropriation Number Profile.

### Definitions

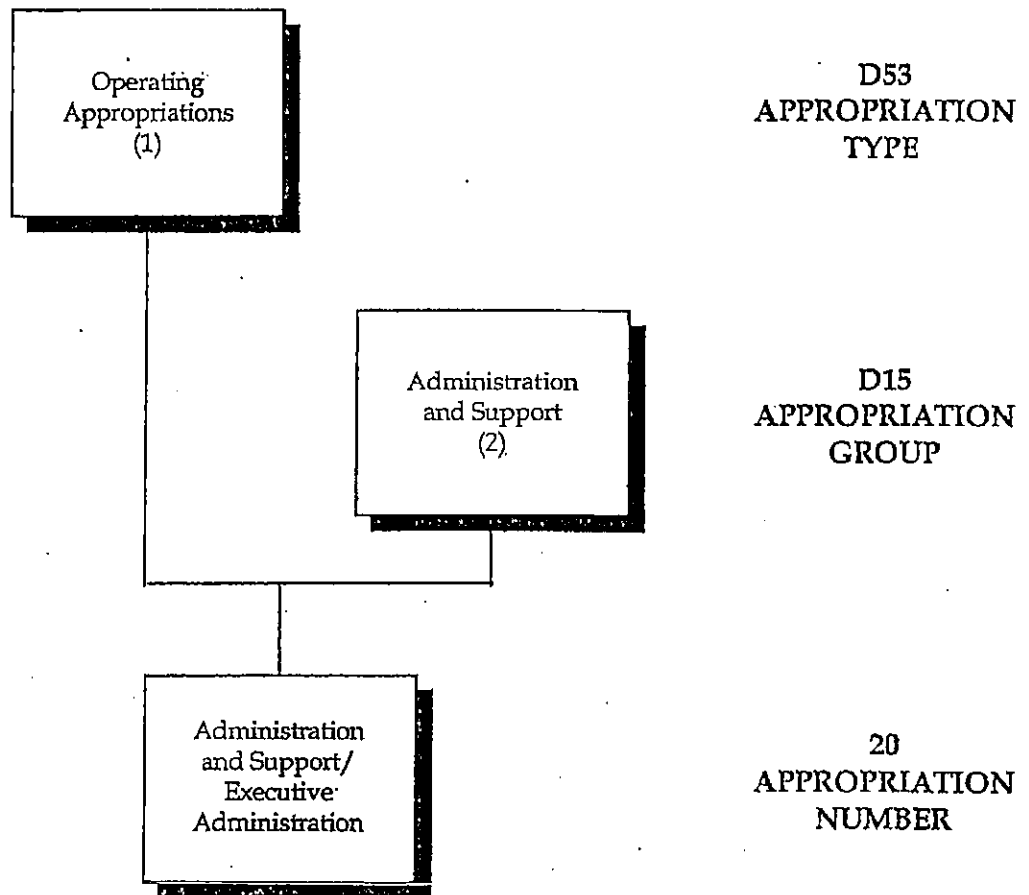
**Appropriation Number** - identifies each budgeted line item in the General Appropriations Act and is the lowest level of the appropriation structure. Examples include executive administration, planning and research, support operations and examinations and supervision.

**Appropriation Group** - maintained at the systemwide level. This element may be used for fiscal policy analysis reporting. Examples include general funds, federal funds, other funds, federal funds non-budgeted and other funds non-budgeted.

**Appropriation Type** - may cross agencies. The appropriation type grouping is used for systemwide reporting. This element is currently not being used.

Both appropriation group and appropriation type are defined centrally. The R★STARS appropriation structure is illustrated below.

## APPROPRIATION STRUCTURE



1 Appropriation type may cross agencies.

2 Appropriation group is maintained at the statewide level.

## Program Structure

The first two levels of the program structure will be reserved for systemwide use. These levels will be defined and maintained by the Fiscal Policy Analysis Division since the state will be budgeting by program and the first two levels will be set-up to conform to the state's appropriation pattern. Program level 1 and 2 are generally the highest level of the program structure for systemwide accounting purposes. For institutions of higher education, these levels correspond to their elements of institutional cost.

Seven optional lower levels are provided for agencies or institutions who wish to record detailed program activity. These remaining levels are program level 3 through program level 9.

Program levels are never entered on input transactions; they are inferred from program cost account (PCA) or appropriation number. Therefore, no extra coding is required at data entry in order to report program information.

The optional lower levels, if desired, must be set up as program codes and referenced by PCA's. PCA's may be inferred by the Index or entered on input transactions at the option of the agencies.

### Definitions

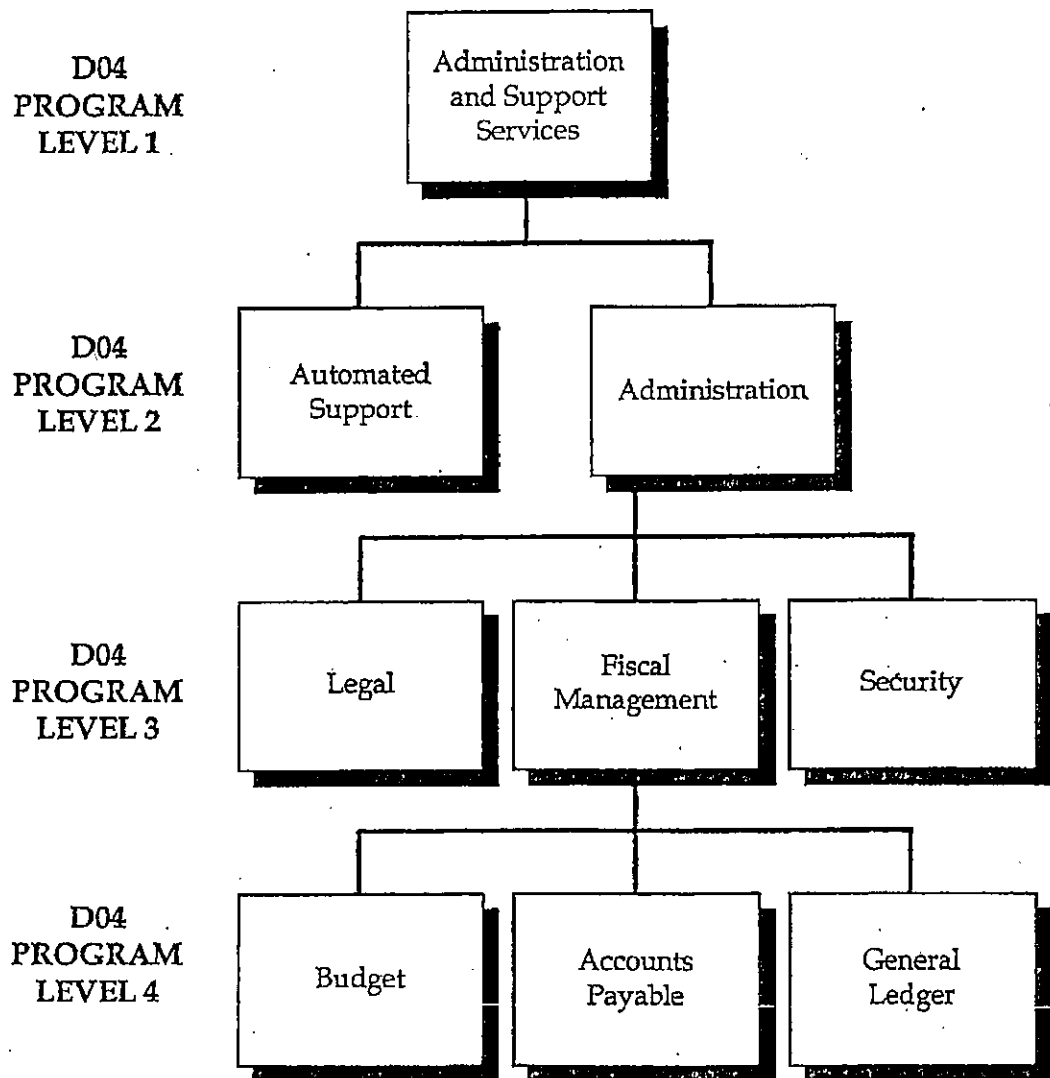
**Program Level 1** - a line item in the General Appropriations Act. Examples are administration and support and examinations and supervision.

**Program Level 2** - a sub-item in the General Appropriations Act. Examples include executive administration, planning and research and support operations.

**Program Levels 3-9** - remaining levels of program. These optional levels may be defined in any manner deemed appropriate by agency administrators.

The R★STARS program structure is illustrated on pages 4-24 and 4-25.

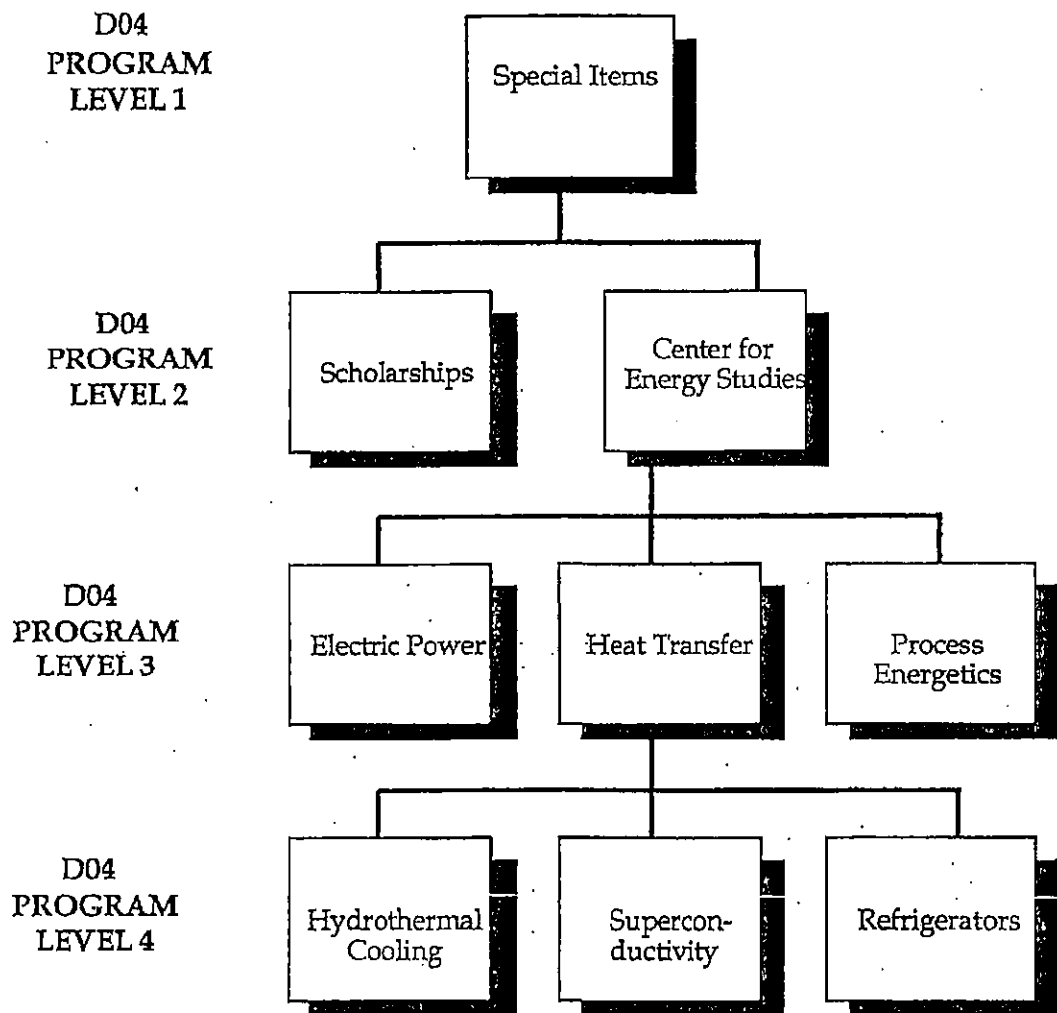
## PROGRAM STRUCTURE AGENCY EXAMPLE



Note: Five additional levels are available.

## PROGRAM STRUCTURE

### HIGHER EDUCATION EXAMPLE



Note: Five additional levels are available.

## Function Structure

This structure may be used by both state agencies and institutions of higher education. Up to nine levels of the function structure may be used and one or more of the higher function levels may be defined systemwide to track a state's benchmarks. Below these levels, the structure may be agency defined.

Institutions of higher education may use the function structure to categorize current fund expenditures in order to produce the Annual Financial Report as set forth by the NACUBO functional classification requirements in the CUBA. Examples include education and general, auxiliary enterprises and hospitals.

The function structure is never entered on input transactions; it is always inferred from the PCA entered on the transaction.

### Definitions

**Function (Level 1-9)** - groups related activities that are aimed at accomplishing a major service or regulatory responsibility. Up to nine levels of function are available and the number of levels used is at the agencies' or institutions' discretion.

## Organization Structure

This structure is used to store and report financial information based on how state agencies are organized.

Agency is the only data element in the organization structure which must be entered. In most cases, the agency defaults to a value contained in the user's security record. The D02 Agency Profile references the agency type.

Level 1 in the organization structure has a value of '0000' for all agencies. Levels 2 - 10 in the organization structure are inferred by the index.

### Definitions

**Agency** - equates to the existing agency number in the state's accounting manual. Agency is the first level of the organization structure.

**Organization Levels 2-10** - The organization structure accommodates up to nine additional levels of organization under each agency. The number of levels used is at the agency's discretion.

Reference Manual  
Classification Structure

**Agency Type** - a classification of agencies. The main purpose of agency type is to distinguish between agencies and institutions of higher education so the system knows whether or not data should flow through the NACUBO classification structure.

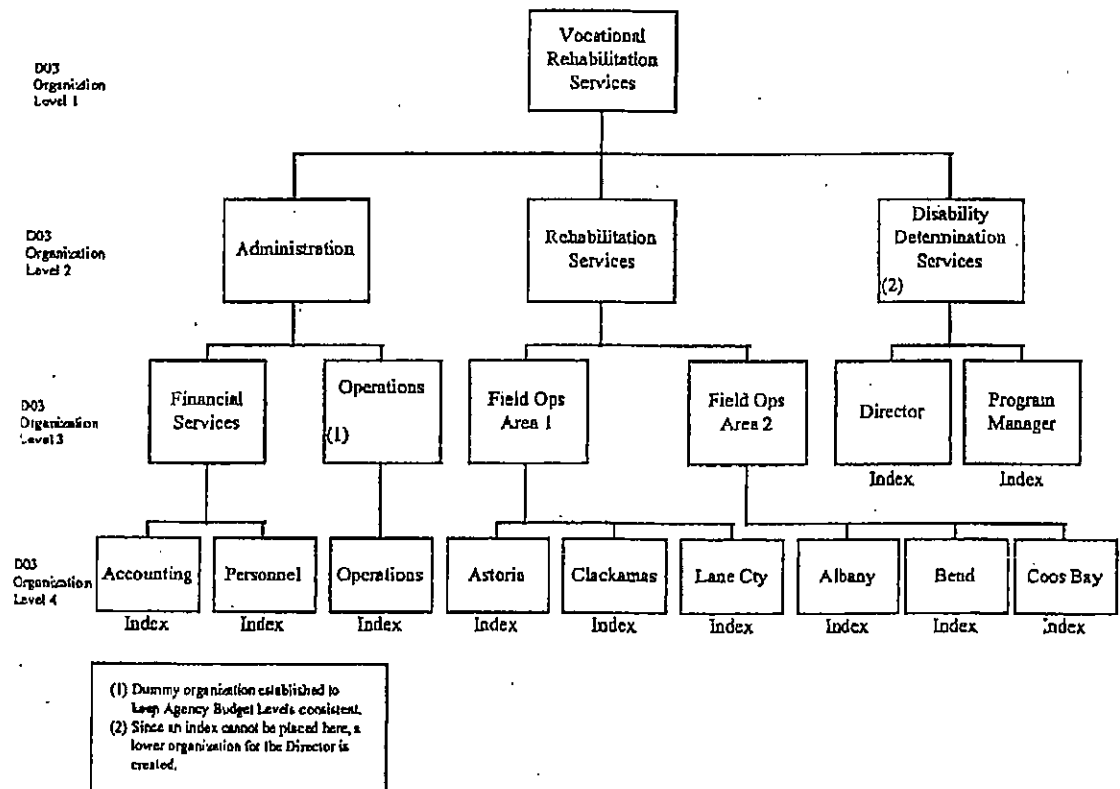
**Agency Group** - a grouping of agencies. The purpose of agency group is to classify similar agencies into a single group for reporting. This element is also used for security purposes.

**GAAP Function** - a grouping of state agencies, for example, economic and community development, education and human resources. GAAP function is used for the GAAP basis reports.

**Cash Basis Function** - an alternate grouping of agencies, for example, executive departments, legislative, judicial and corrections. State function is used in cash basis reports.

The R★STARS organization structure is illustrated on the following pages.

## ORGANIZATION / INDEX EXAMPLE





## Project Structure

Project number, project phase and agency code 2 are used to classify financial activity associated with a project. GAAP requires project accounting for the acquisition or construction of major capital facilities.

The project number, project phase and agency code 2 may be inferred by the index, PCA or grant number/phase. Or the agency may enter project number, project phase and agency code 2 independently during data entry.

### Definitions

**Project Number** - identifies the basic project to be accounted for.

**Project Phase** - provides a further breakdown of a project for accounting and reporting purposes.

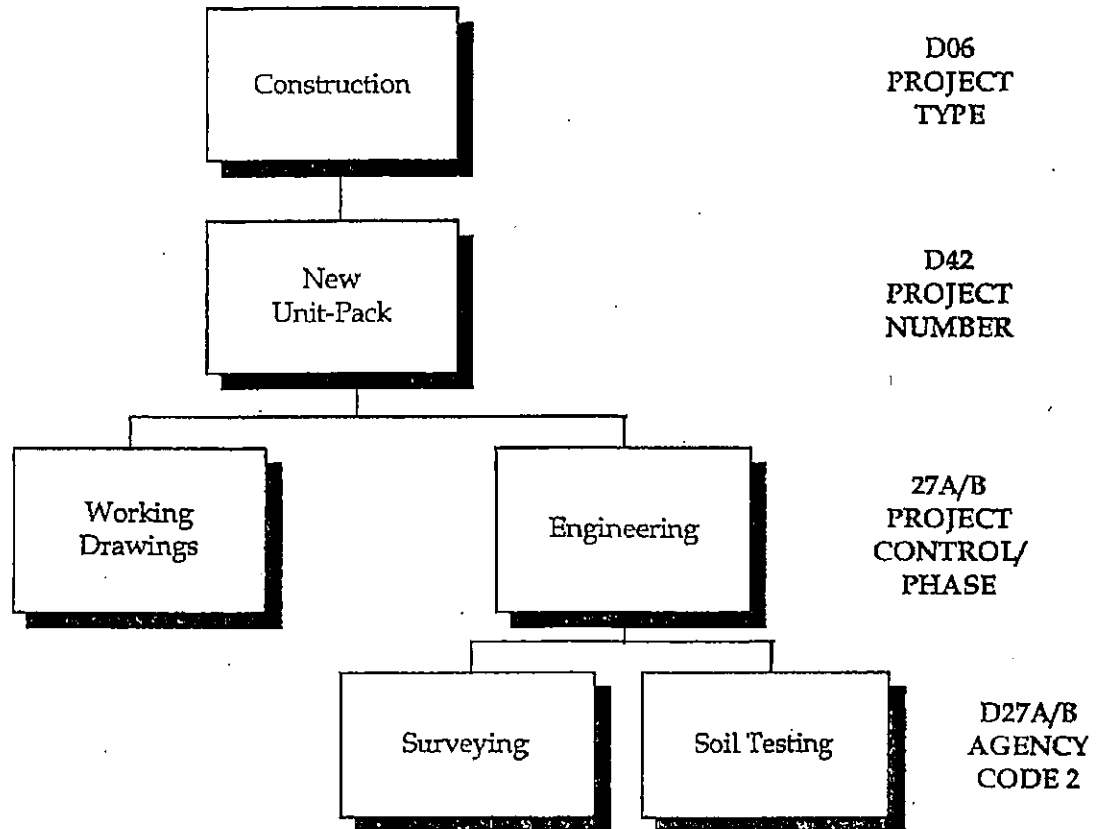
**Agency Code 2** - provides a further breakdown of a project for accounting purposes. It can be used to identify different tasks or activities.

**Project Category** - is a grouping of projects that cross agencies for systemwide reporting. It is an optional data element.

**Project Type** - is a grouping of projects. Projects with similar characteristics may be grouped together by type. For example, all projects relating to construction can be grouped together under a project type - construction.

The R★STARS project structure is illustrated on 4-29.

## PROJECT STRUCTURE



### Grant Structure

The grant structure is necessary for R★STARS to compile the Schedule of Federal Financial Assistance required by the Single Audit Act of 1984 and Office of Management and Budget Circular A-128. In addition, this structure allows agencies using R★STARS for their internal accounting to track grant activity at an appropriate level of detail to ensure control over these funds.

For data entry purposes, R★STARS allows the grant number, phase, agency code 1 and subgrantee to be entered on the input transaction. In addition, the grant number, phase and agency code 1 can be inferred by the index, PCA, project number/phase or subgrantee.

### Definitions

**Grant Number** - records and reports individual grant information. This data element identifies individual grants within a particular grant program (see grant category below).

**Grant Phase** - provides a further breakdown of a grant for accounting and reporting purposes or to identify the grant year for multi-year grants (e.g., 91, 92 or 93).

**Agency Code 1** - provides a further breakdown of a grant for accounting and reporting purposes. It can be used to identify different tasks or activities.

**Subgrantee** - identifies the subcontractor or subrecipient of 'pass-thru' grants. The subgrantee may be another state agency or institution of higher education or it may be other entities that are not within the state entity.

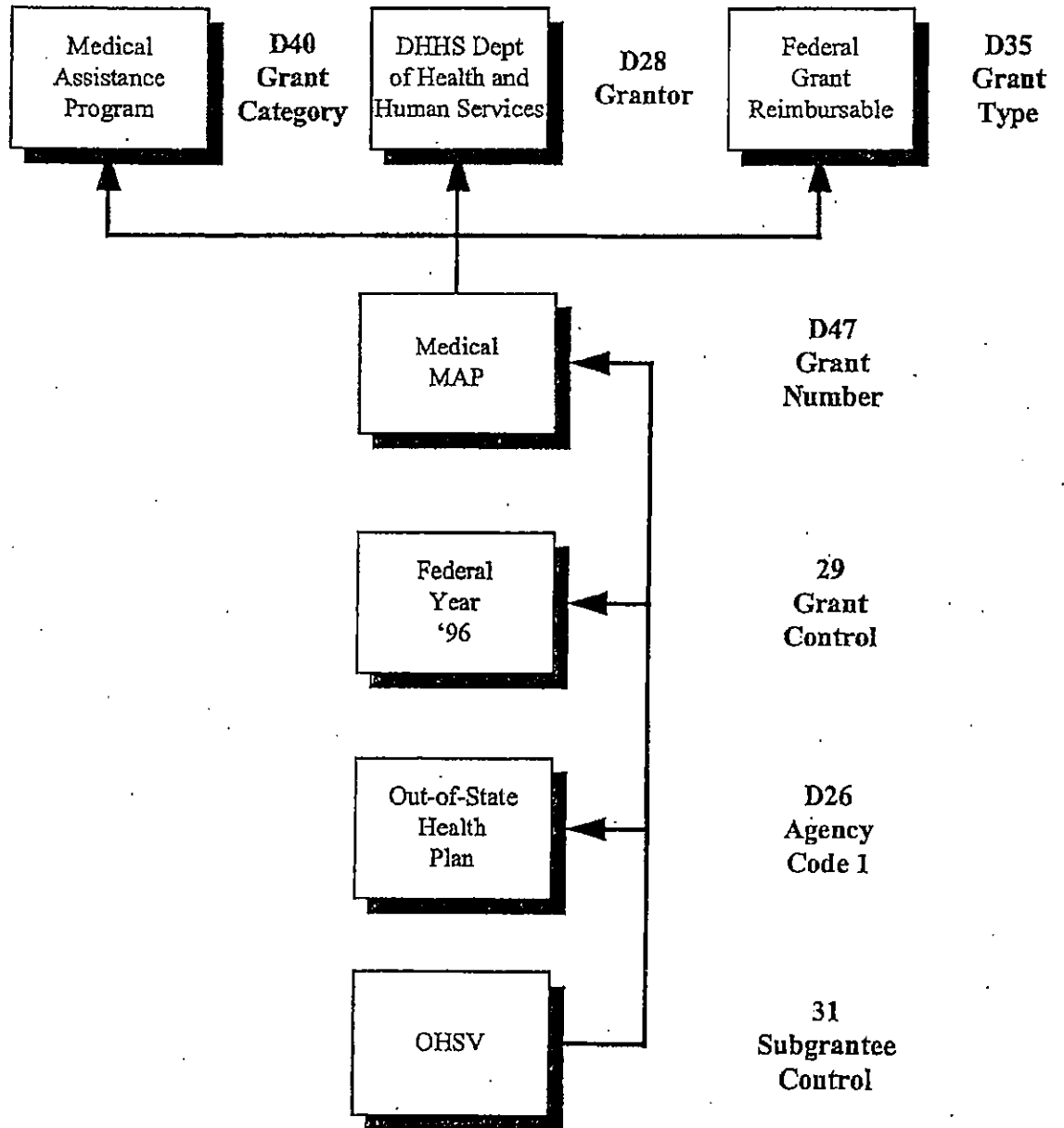
**Grant Category** - identifies the program for each grant. For federal grant programs, this data element corresponds to the CFDA number. Two examples would be 10.028: animal damage control and 83.516: disaster assistance.

**Grantor** - identifies the organization or individual from whom the grant was received. Examples of federal grantors include the U.S. Department of Agriculture, the U.S. Department of Commerce and the National Science Foundation.

**Grant Type** - identifies the grant as federal grant-reimbursable, federal grant-advanced, state grant or other grant. Grant type is referenced by the D47 Grant Number Profile.

The R★STARS grant structure is illustrated on 4-31.

## GRANT STRUCTURE



MAP = Medical Assistance Program

## Other Elements

Other elements are available in the R★STARS classification structure for internal agency reporting. These elements are generically named: agency code 1, agency code 2 and agency code 3. These three elements provide an internal agency code for cost reporting purposes. The titles for each of these codes is defined on a separate profile - D26 Agency Code 1 Profile, D27 Agency Code 2 Profile and D36 Agency Code 3 Profile.

Another element, multipurpose code, is also available for agency use for transaction entry. Unlike agency codes 1, 2 and 3, the multipurpose code is not established in a profile.

*These elements are optional at the agency's discretion.*

The agency code 1, agency code 2, agency code 3 and multipurpose code are entered on input accounting transactions or may be optionally referenced by the 24 Index Code (IC) or Program Cost Account (PCA) Profiles.

## Definitions

**Agency Codes 1, 2 or 3** - are used to identify any category of internal cost reporting needs of an agency. For example, a cost category that crosses internal organization, program, project and grant boundaries may be accumulated with the agency code. Agency code 1 and 2 can be used in the grant and project structures respectively as discussed in the grant and project classification structure. Agency code 3 is also used for recording the treasury account number on deposit transactions for use with deposit reconciliation.

**Multipurpose Code** - a code available in R★STARS for agency use. *It is used for generating allotments for appropriations on a monthly, quarterly or annual basis. Otherwise this element may be used for various agency specific needs.* This code does not have a profile in R★STARS.

Attachment Q12 – Federal Funding by Program for FY2018, FY2019, & FY2020

<b>PROGRAM#</b>	<b>PROGRAMS</b>	<b>FY2018</b>	<b>FY2019</b>	<b>FY2020</b>
1000	AGENCY MANAGEMENT SERVICES	\$ 429,619.65	\$ 632,075.34	\$ 631,789.74
	AGENCY MANAGEMENT SERVICES - MEDICAID	\$ 1,020,696.81	\$ 1,264,915.07	\$ 1,514,722.21
<b>Total</b>		<b>\$ 1,450,316.46</b>	<b>\$ 1,896,990.41</b>	<b>\$ 2,146,511.95</b>
9200	CONSUMER INFO., ASSISTANCE AND OUTREACH	\$ 418,338.50	\$ 400,040.50	\$ 400,040.50
	CONSUMER INFO., ASSISTANCE AND OUTREACH - MEDICAID	\$ 444,387.10	\$ 450,460.02	\$ 469,509.94
		<b>\$ 862,725.60</b>	<b>\$ 850,500.52</b>	<b>\$ 869,550.44</b>
9400	HOME AND COMMUNITY BASED SUPPORT PROGRAM	\$ 2,021,241.32	\$ 2,296,118.66	\$ 2,591,498.43
	HOME AND COMMUNITY BASED SUPPORT PROGRAM - MEDICAID	\$ 880,031.31	\$ 1,036,922.19	\$ 1,157,769.56
		<b>\$ 2,901,272.63</b>	<b>\$ 3,333,040.85</b>	<b>\$ 3,749,267.99</b>
9500	NUTRITION	\$ 4,722,918.00	\$ 4,489,618.00	\$ 4,141,982.00
		<b>\$ 4,722,918.00</b>	<b>\$ 4,489,618.00</b>	<b>\$ 4,141,982.00</b>
<b>Grand Total</b>		<b>\$ 9,937,232.69</b>	<b>\$ 10,570,149.78</b>	<b>\$ 10,907,312.38</b>

**Note:** FY20 federal funds are projections. Full amounts are determined later in the fiscal year. For Medicaid funds, exact amounts are determined quarterly. For non-Medicaid amounts, exact amounts are determined when federal awards have been received.

**Attachment Q15 - FY19 & FY20 Reprogrammings**

FY19 Reprogrammings within DACL									
a	b	c	d	e	f	g	h		
Reprogramming Number	Sending/Receiving Agency	Date	Amount	Funding Source	Originating Program Activity	Originating CSG Codes	Receiving Program Activity	Receiving CSG Codes	Rationale
1	Department of Aging & Community Living	5/28/2019	\$ 275,000	Local	Contractual Services	CSG 41	Personnel Services	CSG 11,14	Funds moved within the agency, between Comptroller Source Groups (CSGs) 41(Contractual Services) and 11&14 (Personnel Services). This reprogramming is part of DACL's Medicaid reconciliation for reclasses of Local/Medicaid expenditures.
2	Department of Aging & Community Living	7/18/2019	\$ 114,051	Local	RTS & Professional Services	CSG 31,40	Supplies	CSG 20	This reprogramming allowed for the procurement of IT software equipments, Computers and Phone Cost for the new division being transferred to DACL. Per Legislation, Adult Protective Service is now permanently operated by DACL. This reprogramming ensured that the 24 APS FTE's have the necessary equipment needed for transfer. Funds moved within agency, from Comptroller Source Group (CSG) 31&40 (RTS &Professional Services) to CSG 20 (IT Supplies).
FY19 Reprogrammings Out of DACL									
a	b	c	d	e	f	g	h		
Reprogramming Number	Sending/Receiving Agency	Date	Amount	Funding Source	Originating Program Activity	Originating CSG Codes	Receiving Program Activity	Receiving CSG Codes	Rationale
3	The Office of the Deputy mayor for Health and Human Services (DMHHS)	9/18/2019	\$ 230,000	Local	Contractual Services	CSG 41	Personnel Services	CSG 11,14	The reprogramming was needed to cover the Office of the Deputy Mayor for Health and Human Services Personnel Cost Activities. Funds moved from DACL to DMHHS, between Comptroller Source Groups (CSGs) 41(Contractual Services) and 11&14 (Personnel)
4	Department of Human Resources (DCHR)	9/25/2019	\$ 120,000	Local	Contractual Services	CSG 41	Contractual Services	CSG 41	The Reprogramming was needed to cover the Department of Human Resources contractual cost Activities. Funds moved from DACL to DCHR between Comptroller Source Groups (CSGs) 41(Contractual Services) and 41 41(Contractual Services).
FY20 Reprogrammings Out of DACL									
a	b	c	d	e	f	g	h		
Reprogramming Number	Sending/Receiving Agency	Date	Amount	Funding Source	Originating Program Activity	Originating CSG Codes	Receiving Program Activity	Receiving CSG Codes	Rationale
1	Office of the City Administrator	10/8/2019	\$ 113,166	Local	Contractual Services	CSG 41	Personnel Services	CSG 11,14	The reprogramming was needed to cover the Office of the City Administrator Personnel Cost Activities in support of DACL operations. Funds moved from DACL to OCA, between Comptroller Source Groups (CSGs) 41(Contractual Services) and 11&14 (Personnel).
2	The Office of the Deputy mayor for Health and Human Services (DMHHS)	12/11/2019	\$ 50,000	Local	Contractual Services	CSG 41	Personnel Services	CSG 11,14	The reprogramming was needed to cover the Office of the Deputy Mayor for Health and Human Services Personnel Cost Activities. Funds moved from DACL to DMHHS, between Comptroller Source Groups (CSGs) 41(Contractual Services) and 11&14 (Personnel)

Note: Please see response to Question 11 for DACL's budgets before and after reprogrammings by Fiscal Year.

**Attachment Q16 - FY19 & FY20 Grants, Sub-Grants, and Multi-Year Grants Received by DACL**

(i) Source	(ii) Purpose	(iii) TimeFrame	2019		2020*		(vii) FTEs	(vi) Terms of Funding	(vii) Explanation for Expiring Grants
			(iv) Amount Received	(v) Expenditures	(iv) Amount Received	(v) Expenditures			
DHHS/TITLE III	SUPPORTIVE SERVICES	Oct.1 - Sept.30	\$ 1,911,839.00	\$ 1,688,134.29	\$ 421,824.00	\$ -	4.00	OAA Formula Grant Funding	Formula grant based on population. No
DHHS/TITLE III	CONGREGATE MEALS	Oct.1 - Sept.30	\$ 2,447,751.00	\$ 1,917,005.42	\$ 272,508.00	\$ -		OAA Formula Grant Funding	Formula grant based on population. No
DHHS/TITLE III	HOME DELIVERED MEALS	Oct.1 - Sept.30	\$ 1,242,222.00	\$ 1,061,512.33	\$ 537,138.00	\$ -		OAA Formula Grant Funding	Formula grant based on population. No
DHHS/TITLE III	NFCSP - CAREGIVERS	Oct.1 - Sept.30	\$ 896,526.00	\$ 836,651.76	\$ 197,820.00	\$ -		OAA Formula Grant Funding	Formula grant based on population. No
DHHS/TITLE III	PREVENTIVE HEALTH	Oct.1 - Sept.30	\$ 123,299.00	\$ 97,071.36	\$ 27,219.00	\$ -		OAA Formula Grant Funding	Formula grant based on population. No
DHHS/TITLE III	OMBUDSMAN ACTIVITY	Oct.1 - Sept.30	\$ 23,741.00	\$ 23,544.00	\$ 5,229.00	\$ -		OAA Formula Grant Funding	Formula grant based on population. No
DHHS/TITLE III	ELDER ABUSE PREVENTION	Oct.1 - Sept.30	\$ 84,172.00	\$ 83,288.00	\$ 18,496.00	\$ -		OAA Formula Grant Funding	Formula grant based on population. No
DHHS/TITLE III	ALZHEIMERS DISEASE PROGRAM (ADSSP)	Aug.1 - Jul.31	\$ 633,405.68	\$ 107,913.33	\$ 525,492.35	\$ -	0.55	Discretionary Funding	anticipates a no-cost extension for
DHHS/TITLE III	ADMIN ON AGING-MEDICARE+CHOICE (MIPPA)	Sept.29 - Sept.30	\$ 8,368.00	\$ 7,520.63	\$ 8,542.00	\$ -		Discretionary with a Formula Grant	Discretionary with a funding formula grant
DHHS/TITLE III	DHHS/HIICAP PROGRAM	Sept.29 - Sept.30	\$ 15,120.00	\$ 9,645.23	\$ 15,423.00	\$ -		Discretionary with a Formula Grant	Discretionary with a funding formula grant
DHHS/TITLE III	ELDERLY NUTRITION PROGRAM	Oct.1 - Sept.30	\$ 826,081.00	\$ 415,831.04	\$ 180,952.00	\$ -		OAA Formula Grant Funding	Formula grant based on population. No
DHHS/HIICAP PROGRAM	STATE HEALTH INS.PROGRAM (SHIP)	April 1-March 31	\$ 148,645.00	\$ 49,742.77	\$ 251,349.20	\$ -	2.00	Cooperative Agreement	Cooperative Agreement grant based on
			<b>\$ 8,361,169.68</b>	<b>\$ 6,297,860.16</b>	<b>\$ 2,461,992.55</b>	<b>\$ -</b>			

**Note:** all federal grants follow two-year cycles. Any unspent funds rollover to the next fiscal year and are fully exhausted.

\*Federal funds are received throughout the year, so the amount received by the end of FY20 will be higher than the amounts received in Q1



**Attachment Q17 -  
FY2019 DACL**

A. Contract / Vendor Name	B. Description of goods/services	C. Contract Amount	Expended Amounts	D. Contract Period	E. Solicitation Method	F. Contract Monitor	G. Funding Source	Monitoring Activity
THE WASHINGTON INFORMER	Media Outreach	\$ 30,000.00	\$ 27,500.00	10/1/2018 9/30/2019	Title IV Competition Exemptions Sec.413 (12)	Darlene Nowlin	Local	DACL reviewed and monitored invoiced amount for accuracy and delivery of services.
THE CURRENT NEWSPAPER	Media Outreach	\$ 6,804.00	\$ 6,804.00	10/1/2018 9/30/2019	Title IV Competition Exemptions Sec.413 (12)	Darlene Nowlin	Local	DACL reviewed and monitored invoiced amount for accuracy and delivery of services.
THE SENIOR ZONE	Media Outreach	\$ 8,642.00	\$ 8,642.00	10/1/2018 9/30/2019	Title IV Competition Exemptions Sec.413 (12)	Darlene Nowlin	Local	DACL reviewed and monitored invoiced amount for accuracy and delivery of services.
THE BEACON NEWSPAPERS INC.	Media Outreach	\$ 60,000.04	\$ 56,000.00	10/1/2018 9/30/2019	Title IV Competition Exemptions Sec.413 (12)	Darlene Nowlin	Local	DACL reviewed and monitored invoiced amount for accuracy and delivery of services.
GREAT AMERICAN CORP.	Prepare and deliver daily community dining meals to sites in wards 1-8; prepare ready-to-eat home-delivered meals daily for wards 1-8	\$ 2,700,000.00	\$ 2,700,000.00	10/1/2018 9/30/2019	Competitive Sealed Proposal (RFP)	Jackie Gerahnick, Public Health Nutritionist	Local	DACL reviews monthly invoices to ensure services were in line with demands. DACL reviewed seasonal menus as they changed and followed up on client issues or complaints. DACL completed site visits at each community dining site (46 total) throughout the year to monitor and evaluate performance. No cure notices have been provided and no corrective action plans have been needed.
GREAT AMERICAN CORP.	Prepare and deliver daily community dining meals to sites in wards 1-8; prepare ready-to-eat home-delivered meals daily for wards 1-8	\$ 2,218,058.46	\$ 2,044,950.50	10/1/2018 9/30/2019	Competitive Sealed Proposal (RFP)	Jackie Gerahnick, Public Health Nutritionist	Federal	DACL reviews monthly invoices to ensure services were in line with demands. DACL reviewed seasonal menus as they changed and followed up on client issues or complaints. DACL completed site visits at each community dining site (46 total) throughout the year to monitor and evaluate performance. No cure notices have been provided and no corrective action plans have been needed.
PURFOODS LLC DBA MOMS MEALS	Prepare and deliver refrigerated/frozen home-delivered meals to individual resident's homes in wards 1-8	\$ 1,896,812.63	\$ 1,896,812.63	10/1/2018 9/30/2019	Competitive Sealed Proposal (RFP)	Jackie Gerahnick, Public Health Nutritionist	Local	DACL reviews monthly invoices to ensure services were in line with demands. DACL reviewed seasonal menus as they changed and followed up on client issues or complaints. No cure notices have been provided and no corrective action plans have been needed.
PURFOODS LLC DBA MOMS MEALS	Prepare and deliver refrigerated/frozen home-delivered meals to individual resident's homes in wards 1-8	\$ 1,528,307.50	\$ 1,486,866.75	10/1/2018 9/30/2019	Competitive Sealed Proposal (RFP)	Jackie Gerahnick, Public Health Nutritionist	Federal	DACL reviews monthly invoices to ensure services were in line with demands. DACL reviewed seasonal menus as they changed and followed up on client issues or complaints. DACL completed 1 site visit at each community dining site throughout the year, monitored and evaluated performance. No cure notices have been provided and no corrective action plans have been needed.
MEDIWARE INFORMATION SYSTEMS	Client Database, Tracking clients and services for DACL	\$ 59,303.43	\$ 59,303.43	10/1/2018 9/30/2019	Competitively Bid	Yolanda Lyles	Local	DACL reviewed and monitored invoiced amount for accuracy and delivery of services.
XEROX CORPORATION	Copy Machine Service and Maintenance	\$ 63,873.52	\$ 48,317.83	10/1/2018 9/30/2019	Competitively Bid	Yolanda Lyles	Local	DACL reviewed and monitored invoiced amount for accuracy and delivery of services.
HEARTLINE FITNESS SYSTEMS	Maintenance/repairs of gym equipment at SW Cs	\$ 10,000.00	\$ 8,327.52	7/1/2018 9/30/2019	Competitively Bid	Nigel John	Local	DACL reviewed and monitored invoiced amount for accuracy and delivery of services.
ALL STAGE AND SOUND INC	Stage Equipment	\$ 6,323.60	\$ 6,323.60	12/4/2018 9/30/2019	Competitively Bid	Darlene Nowlin	Local	DACL reviewed and monitored invoiced amount for accuracy and delivery of services.
BROOKE RENTAL CENTER	Rental, Chairs, Tables, Setup	\$ 11,691.25	\$ 11,691.25	12/10/2018 9/30/2019	Competitively Bid	Darlene Nowlin	Local	DACL reviewed and monitored invoiced amount for accuracy and delivery of services.
CE RENTAL INC	Large Tent for Senior Fall Open Run Park	\$ 6,973.00	\$ 6,973.00	9/20/2019 9/30/2019	Competitively Bid	Darlene Nowlin	Local	DACL reviewed and monitored invoiced amount for accuracy and delivery of services.
COMPASS GROUP USA INC	Kellogg Center - Centenarian Salute 2019 - DC Seniors 100ys	\$ 13,457.00	\$ 13,457.00	2/15/2019 9/30/2019	Competitively Bid	Darlene Nowlin	Local	DACL reviewed and monitored invoiced amount for accuracy and delivery of services.
DGI DOCS INC	IT Services/Support	\$ 11,000.00	\$ 11,000.00	9/5/2019 9/30/2019	Competitively Bid	Yolanda Lyles	Local	DACL reviewed and monitored invoiced amount for accuracy and delivery of services.
ISTUDIO	IT Services/Support	\$ 15,000.00	\$ 13,140.00	9/27/2019 9/30/2019	Competitively Bid	DCS	Local	DACL reviewed and monitored invoiced amount for accuracy and delivery of services.
MANAGEMENT CONCEPTS INC	IT Support/Network Support/IT Services	\$ 19,421.00	\$ 19,421.00	8/28/2019 9/30/2019	Competitively Bid	Eric Mammel	Local	DACL reviewed and monitored invoiced amount for accuracy and delivery of services.
NANCY CROWELL	IT Support/Network Support/IT Services	\$ 38,200.00	\$ 3,492.00	3/6/2019 9/30/2019	Competitively Bid	Linda Itrary	Local	DACL reviewed and monitored invoiced amount for accuracy and delivery of services.
GARY GLAZNER	Alzheimer's Poetry Project (APP)	\$ 95,600.00	\$ 70,500.00	3/25/2019 9/30/2019	Competitively Bid	Linda Itrary	Local	DACL reviewed and monitored invoiced amount for accuracy and delivery of services.
SP PLUS CORPORATION	SP Plus - Parking at 250 E Street SW	\$ 4,080.00	\$ 4,080.00	2/26/2019 9/30/2019	Competitively Bid	Nigel John	Local	DACL reviewed and monitored invoiced amount for accuracy and delivery of services.
Wosten Appliance	Wosten Appliance	\$ 8,046.00	\$ 8,046.00	3/8/2019 9/30/2019	Competitively Bid	Tanya Reid	Local	DACL reviewed and monitored invoiced amount for accuracy and delivery of services.
REINGOLD LINK	DACL Rebranding	\$ 41,875.00	\$ 41,875.00	5/30/2019 9/30/2019	Competitively Bid	Karen Debin	Local	DACL reviewed and monitored invoiced amount for accuracy and delivery of services.
ONE CLIPBOARD SPLASH	One Clipboard Splash	\$ 20,000.00	\$ 20,000.00	7/18/2019 9/30/2019	Competitively Bid	Yolanda Lyles	Local	DACL reviewed and monitored invoiced amount for accuracy and delivery of services.
HARMONY INFORMATION SYSTEMS	Harmony Information Systems	\$ 51,803.43	\$ 51,803.43	8/2/2019 9/30/2019	Competitively Bid	Yolanda Lyles	Local	DACL reviewed and monitored invoiced amount for accuracy and delivery of services.
HARMONY INFORMATION SYSTEMS	NAPIS Report Update	\$ 7,500.00	\$ 7,500.00	9/20/2019 9/30/2019	Competitively Bid	Yolanda Lyles	Local	DACL reviewed and monitored invoiced amount for accuracy and delivery of services.
THE SMARTIN	IT Services/Support	\$ 9,900.00	\$ 9,900.00	12/17/2018 9/30/2019	Competitively Bid	Darlene Nowlin	Local	DACL reviewed and monitored invoiced amount for accuracy and delivery of services.

# Department of Aging and Community Living FY2019

**Agency** Department of Aging and Community Living

**Agency Code** BY0

**Fiscal Year** 2019

**Mission** The mission of the District of Columbia Office on Aging (DCOA) is to advocate, plan, implement, and monitor programs which promote longevity, independence, dignity, and choice for older District residents (age 60 plus), persons living with disabilities (age 18 to 59), and their caregivers.

**Summary of Services** DCOA provides information, assistance, and outreach to District seniors, people living with disabilities, and their caregivers in order to increase awareness and access to services and supports that will enable them to maintain their independence and quality of life in the community. The agency also offers adult day care, advocacy and legal services, caregiver respite and support, case management, education and employment training, fitness, health and wellness promotion, in-home support, long-term care counseling and support, nutrition counseling, recreation, and essential medical transportation that allow older District residents to age in place. Additionally, the agency management gives administrative support and the required tools to achieve operations and programmatic results, which is standard for all agencies using performance-based budgeting

## 2019 Accomplishments

Accomplishment	Impact on Agency	Impact on Residents
DACL provided new grant awards for LGBTQ-specific senior programming.	This is the first time DACL has competed a grant specifically for LGBTQ+ programming and first time that the agency will have as a grantee an LGBTQ-specific organization (the DC Center) delivering programming to seniors. DACL has found internal efficiencies to fund these programs and will monitor outcomes closely.  DACL was recognized this year by the National Area Agencies on Aging at their national conference for DACL's efforts on supporting our LGBTQ seniors.	LGBTQ+ seniors are more likely to be socially isolated and to live alone. As part of a multi-year agency effort to combat isolation and improve outreach to LGBTQ+ seniors, DACL launched a community-led LGBTQ Advisory Committee whose recommendations have led to the development of the agency's first LGBTQ-specific Request for Applications (RFA). LGBTQ+ seniors will benefit from access to programs and services specifically tailored to their preferences including peer-led support groups, weekly coffee and conversation groups, inter-generational mentoring, wellness/educational programs and cultural events.
Successful completion of the agency's first re-branding since it was established in 1975.  In February 2019, Mayor Bowser signed legislation designating the Office on Aging as the Department of Aging and Community Living (DACL).	DACL has a new look! DACL rolled out a new logo, tag line, and vision/values statement. Training was provided to all staff and service providers to promote better alignment with the agency's values and identify. DACL ensured an inclusive re-branding process by receiving input from internal and external stakeholders through interviews and activities.	Residents are better able to identify DACL services and supports due to more consistent DACL presence across the city. For example, all DACL's 52 vehicles have been re-branded with the new DACL logo and phone number, including home-delivered meals trucks.  In addition, seniors, adults with disabilities, and caregivers are better reflected in the agency's new brand creating stronger connections with the agency. Seniors, staff, and providers selected the final logo through a voting process.  DACL was able to complete a record 209 outreach events in all eight wards with a cumulative attendance of more than 15,000.
Revision of DACL's service standards.	DACL is able to better monitor and fund services that have been updated based on best practices. This has created more clarity and expectations on expected quality and coordination of services and supports funded by DACL. The service standards will also allow for long-term programmatic efficiencies and better financial controls by aligning these to performance and outcomes of services.	By updating our service standards, the agency is ensuring higher quality of services in the community for seniors, adult with disabilities, and their caregivers. DACL has updated service standards for case management, adult day care, nutrition, transportation, homemaker services, health promotion, recreation and socialization, and in-home supports.

## 2019 Key Performance Indicators

Measure	Frequency	FY 2017 Actual	FY 2018 Actual	FY 2019 Target	FY 2019 Q1	FY 2019 Q2	FY 2019 Q3	FY 2019 Q4	FY 2019 Actual	KPI Status	Explanation
<b>1 - Customer Information, Assistance and Outreach: Provide information, assistance and outreach to District residents age 60 or older, people with disabilities between the ages of 18 and 59, and caregivers that promotes awareness and access to services and supports offered in the District. (3 Measures)</b>											
Percent of residents working with D.C. Long-Term Care Ombudsman Program that self-report a satisfactory resolution to a complaint, concern, or problem	Annually	94%	91%	85%	Annual Measure	Annual Measure	Annual Measure	Annual Measure	86%	Met	

Measure	Frequency	FY 2017 Actual	FY 2018 Actual	FY 2019 Target	FY 2019 Q1	FY 2019 Q2	FY 2019 Q3	FY 2019 Q4	FY 2019 Actual	KPI Status	Explanation
Percent of residents working with DCOA's Medicaid Enrollment Staff that self-report a positive experience through the Medicaid enrollment process	Annually	94%	95%	85%	Annual Measure	Annual Measure	Annual Measure	Annual Measure	90%	Met	
Percent of callers looking for information and assistance that heard about DCOA services through the agency's outreach efforts	Annually	34.7%	28%	25%	Annual Measure	Annual Measure	Annual Measure	Annual Measure	11%	Unmet	Due to staff changes in our Information & Referral/Assistance unit, this KPI was not closely tracked. The data for this KPI is generated from "How did client hear about us?" field in our system, which was not a required field. It has now been assigned as required field.

**2 - Home and Community-Based Supports: Provide direct services and supports in the community, including nutrition services, for District residents age 60 or older, people with disabilities between the ages of 18 and 59, and caregivers that promote living well in the District. (2 Measures)**

Percent of family caregivers participating in D.C. Caregivers Institute that self-report an improved ability to provide care	Annually	100%	93%	90%	Annual Measure	Annual Measure	Annual Measure	Annual Measure	100%	Met	
Percent of residents attending Senior Wellness Centers that self-report an increase in awareness and practices of health habits	Annually	92.2%	90.5%	80%	Annual Measure	Annual Measure	Annual Measure	Annual Measure	89%	Met	

**3 - Create and maintain a highly efficient, transparent and responsive District government. (8 Measures)**

HR MANAGEMENT - Percent of eligible employees completing and finalizing a performance plan in PeopleSoft (Updated by OCA)	Annually	New in 2019	New in 2019	Not Available	Annual Measure	Annual Measure	Annual Measure	Annual Measure	100%	No Target Set	
HR MANAGEMENT - Percent of eligible employee performance evaluations completed and finalized in PeopleSoft (Updated by OCA)	Annually	New in 2019	New in 2019	Not Available	Annual Measure	Annual Measure	Annual Measure	Annual Measure	Waiting on Data	No Target Set	

Measure	Frequency	FY 2017 Actual	FY 2018 Actual	FY 2019 Target	FY 2019 Q1	FY 2019 Q2	FY 2019 Q3	FY 2019 Q4	FY 2019 Actual	KPI Status	Explanation
FINANCIAL MANAGEMENT - Quick Payment Act (QPA) Compliance - Percent of QPA eligible invoices paid within 30 days (Updated by OCA)	Annually	New in 2019	New in 2019	Not Available	Annual Measure	Annual Measure	Annual Measure	Annual Measure	99.8%	No Target Set	
FINANCIAL MANAGEMENT - Percent of local budget de-obligated to the general fund at the end of year (Updated by OCA)	Annually	New in 2019	New in 2019	Not Available	Annual Measure	Annual Measure	Annual Measure	Annual Measure	Waiting on Data	No Target Set	
CONTRACTS AND PROCUREMENT - Percent of Small Business Enterprise (SBE) annual goal spent (Updated by OCA)	Annually	New in 2019	New in 2019	100%	Annual Measure	Annual Measure	Annual Measure	Annual Measure	Waiting on Data		
IT POLICY AND FOIA COMPLIANCE - Percent of "open" data sets identified by the annual Enterprise Dataset Inventory published on the Open Data Portal - (Updated by OCA)	Annually	New in 2019	New in 2019	Not Available	Annual Measure	Annual Measure	Annual Measure	Annual Measure	100%	No Target Set	
IT POLICY AND FOIA COMPLIANCE - Percent of FOIA Requests Processed in more than 25 business days - statute requirements allow 15 business days and a 10 day extension - (Updated by OCA)	Annually	New in 2019	New in 2019	Not Available	Annual Measure	Annual Measure	Annual Measure	Annual Measure	Waiting on Data	No Target Set	
HR MANAGEMENT - Average number of days to fill vacancy from post to offer acceptance (Updated by OCA)	Annually	New in 2019	New in 2019	New in 2019	Annual Measure	Annual Measure	Annual Measure	Annual Measure	Waiting on Data	No Target Set	

\*The HR management, financial Management, IT policy and FOIA compliance, and Contracts and Procurement measures were collected for all mayoral agencies in FY 2019. OCA calculates these measure based on summary-level data from various agencies, and cannot verify the accuracy of any calculations that were made to the source data prior to its receipt by OCA. The 2019 DC Enterprise Data Inventory (EDI), which contains data on "open" data sets published on DC's Open Data Portal, is current as of March 9, 2019. Due to data lags, FY 2019 data for the following core business measures will be published in March 2020: Contracts and Procurement - Percent of Small Business Enterprise (SBE) annual goal spent; Financial Management - Percent of local budget de-obligated to the general fund at the end of year; Human Resource Management - Average number of days to fill vacancy from post to offer acceptance; Human Resource Management - Percent of eligible employee performance evaluations completed and finalized in PeopleSoft; and IT Policy and Freedom of Information Act (FOIA) Compliance - Percent of FOIA Requests Processed in more than 25 business days - statute requirements allow 15 business days and a 10 day extension.

## 2019 Workload Measures

Measure	FY 2017 Actual	FY 2018 Actual	FY 2019 Q1	FY 2019 Q2	FY 2019 Q3	FY 2019 Q4	FY 2019 Actual
<b>1 - Advocacy/Elder Rights (2 Measures)</b>							
Number of hours of advocacy and legal support provided to residents	9232	10,155	2958.5	2460.3	2837.1	2512.1	10,767.9
Number of hours of Long-Term Care Ombudsman services provided to residents	1503	2072	575.1	443.4	504.3	505.1	2027.9
<b>1 - Assistance and Referral Services (4 Measures)</b>							
Number of residents age 60 or older receiving information, referral and assistance through the Aging and Disability Resource Center	16,535	12,479	3958	4919	5745	5764	20,386
Number of people with disabilities between the ages of 18 and 59 receiving information, referral and assistance through the Aging and Disability Resource Center	3560	2993	602	703	769	797	2871
Number of caregivers receiving information, referral and assistance through the Aging and Disability Resource Center	122	191	22	27	40	51	140
Number of residents served by DCOA's Medicaid Enrollment Staff	2651	2437	568	457	641	589	2255
<b>1 - Community Outreach and Special Events (1 Measure)</b>							
Number of DCOA sponsored information and training sessions that increase knowledge and awareness of long-term services and supports in the community	183	207	46	43	66	53	208
<b>2 - In-home Services (2 Measures)</b>							
Number of residents receiving homemaker services	402	411	310	304	302	303	386
Number of residents receiving home adaptations	595	1031	217	249	243	453	1162
<b>2 - Lead Agencies and Case Management (3 Measures)</b>							
Number of residents receiving case management	2128	2373	1232	1251	1101	1075	2429
Number of residents receiving options counseling	4653	6861	1784	1772	2469	2610	8635
Number of residents transitioned from an institutional setting to the community	65	47	9	16	10	9	44
<b>2 - Nutrition Program (2 Measures)</b>							
Number of residents receiving home-delivered meals	3218	3397	2654	2847	2841	2815	3555
Number of residents attending community dining sites	5215	5016	3408	3253	3466	3267	4550
<b>2 - Senior Wellness Center/Fitness (1 Measure)</b>							
Number of residents attending Senior Wellness Centers	2881	3397	2232	2031	2454	2346	3366
<b>2 - Transportation (2 Measures)</b>							
Number of residents provided transportation to medical appointments	1195	1763	980	1014	1126	1155	1628
Number of residents provided transportation to social and recreational activities	1462	1861	1328	1224	1354	1350	2037

## 2019 Operations

Operations Header	Operations Title	Operations Description	Type of Operations
<b>1 - Customer Information, Assistance and Outreach: Provide information, assistance and outreach to District residents age 60 or older, people with disabilities between the ages of 18 and 59, and caregivers that promotes awareness and access to services and supports offered in the District. (3 Activities)</b>			
ADVOCACY/ELDER RIGHTS	Advocacy/Elder Rights	Provide legal and advocacy support and protective services for District residents age 60 or older in need of assistance with long-term care planning, quality of care disputes, estate and financial planning, and civil disputes.	Daily Service
ASSISTANCE AND REFERRAL SERVICES	Assistance and Referral Services	Provide information on, connection to, and assistance with accessing home and community-based services, long-term care options, and public benefits for District residents age 60 or older, people with disabilities between the ages of 18 and 59, and caregivers.	Daily Service
COMMUNITY OUTREACH AND SPECIAL EVENTS	Community Outreach and Special Events	Provide engaging socialization opportunities and community service and support awareness campaigns for District residents age 60 or older, people with disabilities between the ages of 18 and 59, and caregivers that combat social isolation, improve access to services, address the needs of LGBT seniors, and project a positive image of aging and people with disabilities.	Daily Service

Operations Header	Operations Title	Operations Description	Type of Operations
<b>2 - Home and Community-Based Supports: Provide direct services and supports in the community, including nutrition services, for District residents age 60 or older, people with disabilities between the ages of 18 and 59, and caregivers that promote living well in the District. (5 Activities)</b>			
IN-HOME SERVICES	In-home Services	Provide in-home adaptations, homemaker services and caregiver support for District residents age 60 or older to help manage activities of daily living, keep the home safe and prevent caregiver burnout.	Daily Service
LEAD AGENCIES AND CASE MANAGEMENT	Lead Agencies and Case Management	Provide core services and supports, such as case management and counseling services, for District residents age 60 or older, people with disabilities between the ages of 18 and 59, and caregivers.	Daily Service
SENIOR WELLNESS CENTER/FITNESS	Senior Wellness Center/Fitness	Provide socialization, physical fitness, and wellness programs for District residents age 60 or older that promote healthy behaviors.	Daily Service
Nutrition Program	Nutrition Program	Provide prepared meals, fresh foods, and nutrition assistance to District residents age 60 or older that maintains or improves health and the ability to remain independent in the community.	Daily Service
TRANSPORTATION	Transportation	Provide transportation services to essential non-emergency medical appointments and social/recreational group trips.	Daily Service

## 2019 Strategic Initiatives

Strategic Initiative Title	Strategic Initiative Description	Completion to Date	Status Update	Explanation for Incomplete Initiative
<b>Assistance and Referral Services (1 Strategic Initiative)</b>				
Enhance customer service experience by improving the efficiency and accuracy of interagency referrals across health and human services cluster agencies.	In FY19, DCOA's Aging and Disability Resource Center (ADRC) will co-coordinate quarterly workgroup meetings for health and human services (HHS) intake/enrollment managers to strengthen inter-agency relationships and accurate information flow among agencies. ADRC will co-organize on-going cross trainings and update trainings created under the DC Support Link initiative (video and in-person) with all HHS agencies and work collaboratively DDS's Intake team (Supervisors and Staff) to ensure a successful transition of DCOA's Medicaid Enrollment Specialists and Information & Referral and Assistance (I&RA) teams to 250 E Street SW. DCOA will develop a method for tracking the number and accuracy of referrals to HHS sister agencies, to improve the quality of inter-agency referrals.	Complete	DACL continued to co-facilitate the Frontline Managers' Workgroup, coordinating two planning meetings (7/8 and 9/3) for a cultural and linguistic competency training for frontline staff and managers on 9/27. Workgroup members unanimously requested this topic. The National Center for Cultural Competence provided the initial training, with participation from cultural offices within the Mayor's Office of Community Affairs: Asian and Pacific Islanders, LGBTQ, and Latino Affairs. The training had 48 attendees with representation from DACL, DDS, DHCF, DHS and DBH.	All components of this KPI were completed except establishing a method for tracking the number and accuracy of referrals to HHS sister agencies.
<b>Community Outreach and Special Events (1 Strategic Initiative)</b>				
Improve outreach to underserved populations through social engagement.	In FY19, DCOA will improve outreach to targeted underserved populations, including LGBTQ older adults, non-English speaking residents, and older men by enhancing the DCOA Ambassadors Program, implementing recommendations from the LGBTQ Advisory Committee, and creating new private and government partnerships. DCOA will increase the number of cumulative staff hours spent conducting limited or non-English proficient (LEP/NEP) outreach and implement LGBTQ-specific programming through three lead agencies. This will allow DCOA to better promote resources and connect isolated seniors to the appropriate information and services that best meet their needs.	Complete	DACL provided two additional events for LEP/NEP residents, a total of 6 additional outreach hours and translated all outreach materials into Amharic, Spanish, Korean, Chinese, French, and Vietnamese. We trained 23 additional ambassadors. In addition, DACL sent grant award notifications for the LGBTQ program grantees, which included two additional providers—one of which is LGBTQ organization the DC Center, bringing the total number of providers to five organizations. DACL also produced a video highlighting LGBTQ programs, which was presented at a national conference to provide guidance to other jurisdictions on outreach to underserved LGBTQ populations.	
<b>In-home Services (1 Strategic Initiative)</b>				
Expand the Safe at Home Program through a new cost-sharing component.	In FY19, through a \$4.5 million investment by the Mayor, DCOA will continue the operations of the Safe at Home Program and add a new cost-sharing component to accommodate residents who make up to 100% of the Area Median Income (AMI). This will allow more older residents to continue living in their homes and communities.	Complete	Rebuilding Together DC Alexandria (RTDCA) has received 38 referrals of clients interested in the cost share program. 3 clients have completed the program. RTDCA has reached out to a total of 67 clients that were denied from the previous Safe at Home (SAH) program due to their income eligibility. Some of the clients have requested application packages be sent out to them to enroll in the program. Rebuilding Together was also able to take on an additional 43 non cost share clients during FY 19.	

Strategic Initiative Title	Strategic Initiative Description	Completion to Date	Status Update	Explanation for Incomplete Initiative
<b>Senior Wellness Center/Fitness (2 Strategic initiatives)</b>				
Promote holistic wellness for seniors in Wards 2 and 3	In FY19, DCOA will create more opportunities for older residents to access services and wellness activities in Wards 2 & 3 where no brick and mortar Senior Wellness Centers (SWCs) exist by implementing a Satellite Wellness Pilot Program in these wards. The pilot will increase the number of fitness and wellness activities across both Wards.	Complete	Since January of 2019 Iona has successfully collaborated with stakeholders and community members to increase access to wellness programming for older adults in Wards 2 & 3 by creating a website that serves as a searchable directory of both existing and new programming and emailing out a newsletter each week to over 800 constituents.	
Enhance supports for seniors suffering from dementia through the Club Memory Program.	In FY 2019, DCOA will increase participation of seniors attending the Club Memory Program by 10%. DCOA will ensure Club Memory continues its expansion throughout all the Senior Wellness Centers (SWCs) and explore other facilities where such programming may be more convenient for older adults suffering from dementia, their family, and caregivers.	Complete	As of August, 2019, Club Memory has served a total of 671 older adults at the Senior Wellness Centers and other community locations such as churches and libraries. This is an increase of 23.35% from the 544 persons served in FY18.	

# Department of Aging and Community Living FY2020

**Agency** Department of Aging and Community Living

**Agency Code** BYO

**Fiscal Year** 2020

**Mission** The mission of the District of Columbia Office on Aging (DCOA) is to advocate, plan, implement, and monitor programs which promote longevity, independence, dignity, and choice for older District residents (age 60 plus), persons living with disabilities (age 18 to 59), and their caregivers.

## Strategic Objectives

Objective Number	Strategic Objective
1	Customer Information, Assistance and Outreach: Provide information, assistance and outreach to District residents age 60 or older, people with disabilities between the ages of 18 and 59, and caregivers that promotes awareness and access to services and supports offered in the District.
2	Home and Community-Based Supports: Provide direct services and supports in the community, including nutrition services, for District residents age 60 or older, people with disabilities between the ages of 18 and 59, and caregivers that promote living well in the District.
3	Create and maintain a highly efficient, transparent, and responsive District government.

## Key Performance Indicators

Measure	Directionality	FY 2017 Actual	FY 2018 Actual	FY 2019 Actual	FY 2020 Target
<b>1 - Customer Information, Assistance and Outreach: Provide information, assistance and outreach to District residents age 60 or older, people with disabilities between the ages of 18 and 59, and caregivers that promotes awareness and access to services and supports offered in the District. (3 Measures)</b>					
Percent of callers seeking information or assistance on DACL-specific programs or services.	Up is Better	34.7%	28%	11%	25%
Percent of residents working with D.C. Long-Term Care Ombudsman Program that self-report a satisfactory resolution to a complaint, concern, or problem	Up is Better	94%	91%	86%	85%
Percent of residents working with DACL's Medicaid Enrollment Staff that self-report a positive experience through the Medicaid enrollment process	Up is Better	94%	95%	90%	85%
<b>2 - Home and Community-Based Supports: Provide direct services and supports in the community, including nutrition services, for District residents age 60 or older, people with disabilities between the ages of 18 and 59, and caregivers that promote living well in the District. (4 Measures)</b>					
Percent of family caregivers participating in D.C. Caregivers Institute that self-report an improved ability to provide care	Up is Better	100%	93%	100%	90%
Percent of residents attending Senior Wellness Centers that self-report an increase in awareness and practices of health habits	Up is Better	92.2%	90.5%	89%	80%
Percent of referrals in non-emergency cases where initial client contact and investigation takes place within ten working days by Adult Protective Services	Up is Better	New in 2020	New in 2020	New in 2020	New in 2020
Percent of Emergencies Responded to Within 24 Hours by Adult Protective Services	Up is Better	New in 2020	New in 2020	100%	New in 2020

## Core Business Measures

Measure	Directionality	FY 2017 Actual	FY 2018 Actual	FY 2019 Actual



Measure	Directionality	FY 2017 Actual	FY 2018 Actual	FY 2019 Actual
<b>3 - Create and maintain a highly efficient, transparent, and responsive District government. (10 Measures)</b>				
Contracts and Procurement - Percent of Small Business Enterprise (SBE) annual goal spent	Up is Better	New in 2019	New in 2019	Waiting on Data
Financial Management - Percent of local budget de-obligated to the general fund at the end of year	Down is Better	New in 2019	New in 2019	Waiting on Data
Financial Management - Quick Payment Act (QPA) Compliance - Percent of QPA eligible invoices paid within 30 days	Up is Better	New in 2019	New in 2019	99.8%
Human Resource Management - Average number of days to fill vacancy from post to offer acceptance	Down is Better	New in 2019	New in 2019	Waiting on Data
Human Resource Management - Percent of eligible employee performance evaluations completed and finalized in PeopleSoft	Up is Better	New in 2019	New in 2019	Waiting on Data
Human Resource Management - Percent of eligible employees completing and finalizing a performance plan in PeopleSoft	Up is Better	New in 2019	New in 2019	100%
IT Policy and Freedom of Information Act (FOIA) Compliance - Percent of "open" data sets identified by the annual Enterprise Dataset Inventory published on the Open Data Portal	Up is Better	New in 2019	New in 2019	100%
IT Policy and Freedom of Information Act (FOIA) Compliance - Percent of FOIA Requests Processed in more than 25 business days - statute requirements allow 15 business days and a 10 day extension	Down is Better	New in 2019	New in 2019	Waiting on Data
Human Resource Management - Percent of new hires that are DC residents (excludes temporary workers and contractors) (Updated by OCA)	Up is Better	New in 2020	New in 2020	New in 2020
Human Resource Management - Percent of employees that are DC residents (excludes temporary workers and contractors) (Updated by OCA)	Up is Better	New in 2020	New in 2020	New in 2020

\*The above measures were collected for all mayoral agencies in FY2019. The 2019 open data inventory includes data for calendar year 2018. Due to data lags, FY2019 data for the following core business measures will be available in March 2020: Contracts and Procurement - Percent of Small Business Enterprise (SBE) annual goal spent; Financial Management - Percent of local budget de-obligated to the general fund at the end of year; Human Resource Management - Average number of days to fill vacancy from post to offer acceptance; Human Resource Management - Percent of eligible employee performance evaluations completed and finalized in PeopleSoft; and IT Policy and Freedom of Information Act (FOIA) Compliance - Percent of FOIA Requests Processed in more than 25 business days - statute requirements allow 15 business days and a 10 day extension.

## Operations

Operations Header	Operations Title	Operations Description	Type of Operations
<b>1 - Customer Information, Assistance and Outreach: Provide information, assistance and outreach to District residents age 60 or older, people with disabilities between the ages of 18 and 59, and caregivers that promotes awareness and access to services and supports offered in the District. (4 Activities)</b>			
ADVOCACY/ELDER RIGHTS	Advocacy/Elder Rights	Provide legal and advocacy support and protective services for District residents age 60 or older in need of assistance with long-term care planning, quality of care disputes, estate and financial planning, and civil disputes.	Daily Service
COMMUNITY OUTREACH AND SPECIAL EVENTS	Community Outreach and Special Events	Provide engaging socialization opportunities and community service and support awareness campaigns for District residents age 60 or older, people with disabilities between the ages of 18 and 59, and caregivers that combat social isolation, improve access to services, address the needs of LGBT seniors, and project a positive image of aging and people with disabilities.	Daily Service
ASSISTANCE AND REFERRAL SERVICES	Assistance and Referral Services	Provide information on, connection to, and assistance with accessing home and community-based services, long-term care options, and public benefits for District residents age 60 or older, people with disabilities between the ages of 18 and 59, and caregivers.	Daily Service

Operations Header	Operations Title	Operations Description	Type of Operations
ADULT PROTECTIVE SERVICES	Adult Protective Services	Adult Protective Services (APS) receives and investigates reports of alleged cases of abuse, neglect, and exploitation and self-neglect of vulnerable adults 18 years of age or older. APS conducts assessments and provides linkages to supports and provides services to mitigate against abuse, neglect, self-neglect, and exploitation.	Daily Service
<b>2 - Home and Community-Based Supports: Provide direct services and supports in the community, including nutrition services, for District residents age 60 or older, people with disabilities between the ages of 18 and 59, and caregivers that promote living well in the District. (5 Activities)</b>			
SENIOR WELLNESS CENTER/FITNESS	Senior Wellness Center/Fitness	Provide socialization, physical fitness, and wellness programs for District residents age 60 or older that promote healthy behaviors.	Daily Service
TRANSPORTATION	Transportation	Provide transportation services to essential non-emergency medical appointments and social/recreational group trips.	Daily Service
LEAD AGENCIES AND CASE MANAGEMENT	Lead Agencies and Case Management	Provide core services and supports, such as case management and counseling services, for District residents age 60 or older, people with disabilities between the ages of 18 and 59, and caregivers.	Daily Service
Nutrition Program	Nutrition Program	Provide prepared meals, fresh foods, and nutrition assistance to District residents age 60 or older that maintains or improves health and the ability to remain independent in the community.	Daily Service
IN-HOME SERVICES	In-home Services	Provide in-home adaptations, homemaker services and caregiver support for District residents age 60 or older to help manage activities of daily living, keep the home safe and prevent caregiver burnout.	Daily Service

## Workload Measures

Measure	FY 2017 Actual	FY 2018 Actual	FY 2019 Actual
<b>1 - Adult Protective Services (3 Measures)</b>			
Number of referrals received in APS	New in 2020	New in 2020	New in 2020
Number of court Appointed Guardians/Conservators	New in 2020	New in 2020	New in 2020
Number of cases investigated in APS	New in 2020	New in 2020	New in 2020
<b>1 - Advocacy/Elder Rights (2 Measures)</b>			
Number of hours of advocacy and legal support provided to residents	9232	10,155	10,767.9
Number of hours of Long-Term Care Ombudsman services provided to residents	1503	2072	2027.9
<b>1 - Assistance and Referral Services (4 Measures)</b>			
Number of residents age 60 or older receiving information, referral and assistance through the Aging and Disability Resource Center	16,535	12,479	20,386
Number of people with disabilities between the ages of 18 and 59 receiving information, referral and assistance through the Aging and Disability Resource Center	3560	2993	2871
Number of caregivers receiving information, referral and assistance through the Aging and Disability Resource Center	122	191	140
Number of residents served by DACL's Medicaid Enrollment Staff	2651	2437	2255
<b>1 - Community Outreach and Special Events (1 Measure)</b>			

Measure	FY 2017 Actual	FY 2018 Actual	FY 2019 Actual
Number of DACL sponsored information and training sessions that increase knowledge and awareness of long-term services and supports in the community	183	207	208
<b>2 - In-home Services (2 Measures)</b>			
Number of residents receiving homemaker services	402	411	386
Number of residents receiving home adaptations	595	1031	1162
<b>2 - Lead Agencies and Case Management (3 Measures)</b>			
Number of residents receiving case management	2128	2373	2429
Number of residents receiving options counseling	4653	6861	8635
Number of residents transitioned from an institutional setting to the community	65	47	44
<b>2 - Nutrition Program (2 Measures)</b>			
Number of residents receiving home-delivered meals	3218	3397	3555
Number of residents attending community dining sites	5215	5016	4550
<b>2 - Senior Wellness Center/Fitness (1 Measure)</b>			
Number of residents attending Senior Wellness Centers	2881	3397	3366
<b>2 - Transportation (2 Measures)</b>			
Number of residents provided transportation to medical appointments	1195	1763	1628
Number of residents provided transportation to social and recreational activities	1462	1861	2037

## Strategic Initiatives

Strategic Initiative Title	Strategic Initiative Description	Proposed Completion Date
<b>Adult Protective Services (1 Strategic Initiative)</b>		
Integration of Adult Protective Services (APS) Functions into DACL.	In FY20, DACL will integrate the functions of Adult Protective Services (APS) with DACL's larger direct services delivery system. With the addition of APS, DACL will work on a successful transition and create a responsive, integrated, and adaptive social work team. The integration will allow clients who come into contact with APS to be better connected to services from initial crisis, to stabilization, and continuing support in the community.	09-30-2020
<b>Assistance and Referral Services (1 Strategic Initiative)</b>		
Enhance Programming Activities that Help Reduce Social Isolation.	In FY20, DACL will work with its grantees to increase programming opportunities for seniors living in Wards 2 and 3 by enhancing the Satellite Wellness Program; extending the number of hours and activities at the VIDA Senior Center; increasing the number of LGBTQ seniors participating in LGBTQ programming; and enhancing Alzheimer's support services by adding a new Young Onset Initiative.	09-30-2020
<b>Community Outreach and Special Events (2 Strategic initiatives)</b>		
Planning for New Ward 7 Caregiver Oasis Complex.	In FY20, DACL will work in partnership with DPR on the planning of a new Ward 7 Caregiver Oasis Complex. DACL will work with the community to do community outreach to get feedback and ideas for activities and programs. The complex is expected to be operational in FY22. This initiative in FY20 will achieve the community engagement necessary in the planning phase through town halls, meetings with caregiver stakeholder groups, and focus groups with caregivers.	09-30-2020

Strategic Initiative Title	Strategic Initiative Description	Proposed Completion Date
Develop a Senior Strategic Plan.	In FY20, DACL will work on the development of a 10-year comprehensive strategic plan that will serve as a long-term planning tool for District services for older adults. Per legislation, the plan requires consultation with seniors and community partners. DACL will work to include a diverse group of stakeholders in the development of the plan. DACL will aim to have at least 80% of the plan completed by the end of FY20.	12-31-2020
<b>In-home Services (1 Strategic Initiative)</b>		
Evaluation of the Safe at Home Program.	In FY20, DACL will work with the University of the District of Columbia (UDC) to collect and analyze data to evaluate the impact of the Safe at Home (SAH) Program in reducing falls or falls-risks for those who have received SAH services. During FY20, UDC and DACL will work with grantees and participants to implement a research methodology and perform preliminary statistical data analysis that can be utilized to improve program operations in FY21.	09-30-2020
<b>Senior Wellness Center/Fitness (2 Strategic initiatives)</b>		
Planning for New Senior Wellness Center in Ward 8	In FY20, DACL will work in partnership with DGS, seniors, and community partners to explore activities for a brand new senior wellness center in Ward 8, with a ribbon cutting in 2022. In FY20, DACL will focus on the community engagement needed to create an innovative model representative of the community's preferences. DACL will conduct 8 community town halls and use the feedback to draft an RFA in FY21 to select a provider that can operate the new center in Ward 8.	09-30-2020
Expansion of Senior Wellness Centers (SWCs) in Wards 5 and 8 and Refreshers for all SWCs.	In FY20, DACL will work with DGS towards the expansion of Model Cities Wellness Center (Ward 5) and Congress Heights Senior Wellness Center (Ward 8). DGS and DACL will work with seniors at both centers to ensure participation and engagement in the expansions. In addition, DACL will work with DGS to complete refreshers at all six SWCs. Refreshers and expansions are expected to be completed by the end of FY20.	09-30-2020

Agency Name

Department of Aging & Community Living

Annual Freedom of Information Act Report for Fiscal Year 2019  
October 1, 2018 through September 30, 2019

FOIA Officer Reporting Adam Mingal

**PROCESSING OF FOIA REQUESTS**

- 1. Number of FOIA requests received during reporting period .....6.....
- 2. Number of FOIA requests pending on October 1,2018.....0.....
- 3. Number of FOIA requests pending on September 30,2019.....0.....
- 4. The average number of days unfilled requests have been pending before each public body as of September 30, 2019 .....0.....

**DISPOSITION OF FOIA REQUESTS**

- 5. Number of requests granted, in whole.....2.....
- 6. Number of requests granted, in part, denied, in part.....0.....
- 7. Number of requests denied, in whole.....0.....
- 8. Number of requests withdrawn.....0.....
- 9. Number of requests referred or forwarded to other publicbodies.....0.....
- 10. Other disposition .....4.....

**NUMBER OF REQUESTS THAT RELIED UPON EACH FOIA EXEMPTION**

- 11. Exemption 1 - D.C. Official Code § 2-534(a)(1).....0.....
- 12. Exemption 2 - D.C. Official Code § 2-534(a)(2).....0.....
- 13. Exemption 3 - D.C. Official Code § 2-534(a)(3)
  - Subcategory (A).....0.....
  - Subcategory (B).....0.....
  - Subcategory (C).....0.....
  - Subcategory (D) .....0.....
  - Subcategory (E).....0.....
  - Subcategory (F) .....0.....
- 14. Exemption 4 - D.C. Official Code § 2-534(a)(4) .....0.....
- 15. Exemption 5 - D.C. Official Code § 2-534(a)(5).....0.....

- 16. Exemption 6 - D.C. Official Code § 2-534(a)(6)
  - Subcategory (A).....0.....
  - Subcategory (B).....0.....
- 17. Exemption 7 - D.C. Official Code § 2-534(a)(7).....0.....
- 18. Exemption 8 - D.C. Official Code § 2-534(a)(8).....0.....
- 19. Exemption 9 - D.C. Official Code § 2-534(a)(9).....0.....
- 20. Exemption 10 - D.C. Official Code § 2-534(a)(10).....0.....
- 21. Exemption 11 - D.C. Official Code § 2-534(a)(11).....0.....
- 22. Exemption 12 - D.C. Official Code § 2-534(a)(12).....0.....

**TIME-FRAMES FOR PROCESSING FOIA REQUESTS**

- 23. Number of FOIA requests processed within 15 days.....5.....
- 24. Number of FOIA requests processed between 16 and 25 days.....0.....
- 25. Number of FOIA requests processed in 26 days or more.....1.....
- 26. Median number of days to process FOIA Requests.....12.5.....

**RESOURCES ALLOCATED TO PROCESSING FOIA REQUESTS**

- 27. Number of staff hours devoted to processing FOIA requests.....20.....
- 28. Total dollar amount expended by public body for processing FOIA requests.....0.....

**FEES FOR PROCESSING FOIA REQUESTS**

- 29. Total amount of fees collected by public body.....0.....

**PROSECUTIONS PURSUANT TO SECTION 207(d) OF THE D.C. FOIA**

- 30. Number of employees found guilty of a misdemeanor for arbitrarily or capriciously violating any provision of the District of Columbia Freedom of Information Act.....0.....

**QUALITATIVE DESCRIPTION OR SUMMARY STATEMENT**

Pursuant to section 208(a)(9) of the D.C. FOIA, provide in the space below or as an attachment, “[a] qualitative description or summary statement, and conclusions drawn from the data regarding compliance [with the provisions of the Act].”

DACL does not receive many FOIA requests, but the ones it does receive we endeavor to respond to as quickly and as thoroughly as possible within the parameters set forth by the FOIA statute. From the data above we can conclude that DACL met the statutory deadline in five of the six requests it received. The sixth request was assigned to DACL in error and was actually a request for the Department of Health. Because DACL’s FOIA duties were being transitioned at the time there was a delayed notification of its current FOIA officer. Otherwise, DACL had a successful year in timely responding to FOIAs, while avoiding any appeals, and will work to continue that track record going forward.

**DC Department of Aging and Community Living  
Stakeholder Audit Report  
July 26, 2019**

**Overview**

Over the past few weeks, LINK Strategic Partners (LINK) interviewed nine Department of Aging and Community Living (DACL) stakeholders. This group, which comprised of a list of names provided by DACL, offered a range of perspectives from DACL staff, as well as individuals who work closely with DACL and know the organization well. Interviewees were asked about a range of topics, including perceptions of the agency and its mission, thoughts on branding and audiences, and how to roll out the department's new brand identity once it is finalized. This report details the main themes and insights gleaned during those conversations and concludes with a series of potential recommendations on how to most effectively move forward with rebranding the agency.

**Executive Summary**

The ideas below capture the main takeaways and themes from our conversations and are expanded upon in greater detail throughout the report.

- DACL's mission is generally understood, but there is a lack of awareness about the full extent of the agency's services and programs, as well as the populations that it serves beyond seniors.
- There is unanimous agreement that cultivating a sense of community for seniors, adults with disabilities, and caregivers is a critical component of DACL's mission.
- Per our conversations, the new brand needs to reflect a greater diversity of seniors and adults with disabilities, evoking a sense of inclusivity and belonging.
- Stakeholders want to see DACL expand on recent community outreach efforts and continue raising awareness of the department's services and programs as it deploys the new brand.

**Key Takeaways**

***The Mission Is Clear...Mostly***

Stakeholders' understanding of DACL's mission was mostly consistent, although some were confused about the meaning of the new "Community Living" element of the agency's expanded title. Among those who were unsure, they guessed that it has to do with being more active and visible in the community, but there was a widespread desire to see this clarified in the new branding.

From stakeholders' perspectives, the department's mission is to provide services and programs that improve the quality of life for seniors and adults with disabilities and some, but not all,

included families and caregivers in that charge. They agreed that these programs and services aim to address several issues including health and wellness, socialization, in-home aging, nutrition assistance, and transition services. A couple of stakeholders also discussed how the department advocates for relevant policies and programs at the city level.

Almost every stakeholder talked repeatedly about the importance of helping seniors feel safe and secure, and often this included the comfort and confidence of being able to age in their home as appropriate. Many mentioned that the Safe-At-Home program was, in their eyes, one of the most successful and well-known programs that DACL runs.

### ***Creating Community and Combatting Isolation***

All stakeholders brought up the importance of combatting isolation among seniors and adults with disabilities at some point in the conversation. Many talked about the issue in terms of ensuring people continue to feel actively connected and engaged, rather than forgotten and alone. Others brought up the importance of having easier access to public services and resources.

Beyond combatting isolation, most stakeholders discussed the importance of creating a sense of community and family for seniors and adults with disabilities. They explained that, at least for seniors, “friends and family tend to fall away as you age,” so seniors think of their peers and service providers they regularly interact with as their family. One stakeholder even mentioned that DACL is widely considered to be a part of that “family.”

### ***Making People Feel Connected But Not Dependent***

When asked to describe how DACL should make its constituents feel, there was ubiquitous agreement that they should feel valued and part of a community. One person said, “we should feel seen, heard, and valued *despite* our age.” Multiple stakeholders talked about the importance of ensuring that people do not feel alone and that they have a “family” or “community” that supports them, while also promoting the notion that they can live as independently and actively as they want to. Another stakeholder talked about feeling that they still have a voice and a purpose.

### ***Clarifying Audiences and Messaging***

Based on our conversations, it was clear to nearly all stakeholders that DACL serves all seniors in the District aged 60 and over. Most knew, or could infer that it also serves adults with disabilities ages 18-59, but they noted that it is not clear from the agency’s name or current brand. Most of the stakeholders who work at DACL also mentioned that they serve caregivers while almost none of the external stakeholders did. Most stakeholders, both internal and external, believe that it should be made more apparent in the new brand because “caregivers need a lot of help,” as one stakeholder put it.



We then asked stakeholders how we can most effectively communicate to these communities. Most brought up the need to make language accessible and simple. One person said, “many of the people I work with at DACL don’t have a really high education level, so please make sure that we use language that is accessible for them.” Many also mentioned the need to put the most critical information at the top of a resource and asked that we highlight the department’s phone number so that people who need to speak with someone can easily find out how.

### ***Building an Inclusive Brand***

Although most stakeholders were impressed or proud of how inclusive DACL’s brand and services have been, many noted that there is still room for improvement, especially with regard to seniors and adults with disabilities who are LGBTQ and who are experiencing homelessness or housing instability. There was also a desire to clarify that DACL serves *all* seniors—not just those in need of immediate or long-term support.

Beyond wanting to see more programs and services designed to meet the unique needs of these populations, stakeholders impressed upon us the importance of making sure those communities can more easily see themselves in the brand. One stakeholder noted that, for seniors in the LGBTQ community, “we are the generation that was in the closet; we’re not used to coming out to LGBTQ-identified places for resources. Please make sure our stories are told so we know we can come to DACL for help.” A few others also noted that seniors and adults experiencing homelessness or housing instability often feel intimidated interacting with peers who have more stable housing. We were told that creating awareness and opportunities to connect directly with these populations would go a long way in serving their needs better.

### ***Identifying Misconceptions***

Based on our conversations, there were a few misconceptions that stakeholders were aware of and wanted to see addressed and corrected. Some stakeholders brought up the falsehoods that DACL just serves “poor black and brown people in wards 7 and 8,” and that the department is only helpful when individuals are in crisis. Stakeholders wanted to see new branding that demonstrates the value of DACL’s programs to a broader audience, and how the agency helps seniors and adults with disabilities thrive, not simply survive.

### ***Expanding Awareness of Programs and Services***

There was a widespread desire to see increased awareness of the programs and services that DACL funds and manages, especially among people who may not currently take advantage of support from the agency but may want to do so in the future. Almost all stakeholders lauded DACL’s recent community outreach efforts and engagement, and made it clear that they want to see this trend continue. Effective community outreach, they said, was critical because seniors and adults with disabilities are sometimes limited in their mobility, so any engagement that can be brought directly to them and their neighborhood have a higher likelihood of being successful.

When asked how we can most effectively raise awareness of DACL’s new brand and expanded services, stakeholders said DACL should continue hosting events and being present in the community, run ads near public transit zones, and pitch media on stories that highlight the agency’s new brand and expanded scope of services.

### ***Getting the Word Out***

To raise awareness of DACL’s new brand and expanded mission, stakeholders recommended reaching out to civic leaders and organizations, existing programs that serve seniors and adults with disabilities, city agencies that regularly interact with seniors and their families, and the faith community. Most stakeholders spoke specifically about the need to work with faith communities to spread awareness of who DACL serves and how they can improve peoples’ quality of life. It was noted, however, that this outreach needs to occur in communities of all types of faith. A categorized list of organizations and individuals for outreach suggested by stakeholders is listed below.

#### **Civic and Public Leaders and Organizations**

- DC Council (including Members-At-Large)
- ANC Commissioners
- Executive Office of the Mayor
- Mayor’s Office of Community Relations and Services, including ward liaisons
- Commission on Aging, including the mini-commissions in wards 1, 4, 7, 8
- Senior Advisory Coalition (SAC)

#### **Institutions Supporting Seniors and Adults with Disabilities**

- Lead organizations in each ward
  - Terrific, Inc. (Wards 1, 2, 4)
  - IONA Senior Services (Ward 3)
  - Seabury Ward 5 Aging Services (Ward 5)
  - Seabury Ward 6 Aging Services (Ward 6)
  - Far Southeast Family Strengthening Collaborative (Wards 7, 8)
- All grantees within the Senior Services Network
- University senior centers (like the Hayes Senior Wellness Center)
- Senior wellness centers, including presentations directed at staff members
- Any nutrition programs that serve seniors, especially those that make home deliveries
- “Senior Village” organizations (like West End Village)
- Group meal centers
- Nursing homes and assisted living facilities, including presentations directed at staff members and, specifically, the on-site social worker

#### **DC Government Agencies**

- Department of Parks and Recreation (DPR) programs that serve seniors
- Department of Motor Vehicles (DMV), especially the senior website

- Department of Consumer and Regulatory Affairs (DCRA), particularly programs that remove bulk trash from seniors' homes
- Metropolitan Police Department and Fire and Emergency Medical Service Department
- DC Office of Tax and Revenue
- Department of Housing and Community Development (DHCD)

*Community Institutions and Gathering Spots, Especially in Wards 7 and 8*

- Libraries
- Restaurants popular with seniors (like Georgina's)
- Nail and hair salons
- Barber shops
- Grocery stores and markets
- Centers of faith, including all faiths and any interfaith organizations

**Recommendations and Next Steps**

Based on the insights gleaned from our conversations, and taking into account the context of our research to date, we recommend considering the following actions as we continue the development of the agency's new brand:

1. Define what "Community Living" means by elevating stories and themes that demonstrate how DACL empowers seniors and adults with disabilities to live in and be a part of their community, not isolated and apart from it.
2. Create written messaging that is clear, simple, and accessible to people at all levels of educational attainment.
3. Create a logo, tagline, and vision statement that invokes the themes of community, support and connection, and independent and active living.
4. Work more closely with community partners, including those identified during stakeholder conversations, to raise awareness of DACL's expanded mission, new brand, programs, and services.
5. Focus on telling stories that expand community perceptions of who DACL serves, including members of the LGBTQ community, those experiencing homelessness or housing instability, adults with disabilities, and caregivers.

## APPENDIX

### **Stakeholder Audit Process and Interview Guide**

Over the course of the next several weeks, LINK Strategic Partners (LINK) conducted an audit of Department of Aging and Community Living (DACL) stakeholders to gauge perceptions around the agency's brand identity and recognition.

LINK worked with DACL to identify up to 10 stakeholders for inclusion in the audit. Individuals were contacted via email or phone and asked to participate in a 30-45 minute phone interview. The conversations were led by the LINK project manager and supported by a member of the LINK project team as needed.

LINK analyzed all of the data collected from the phone interviews. A consolidated summary of all replies informed the development of a research report, which will be delivered in late July.

### **Interview Script and Questions**

*“Thank you for talking with us today. We are a communications firm working with the DC Department of Aging and Community Living (DACL) to develop a new brand and associated messaging for the agency. You were identified by the communications team at DACL as someone who can provide critical insights as we embark on our branding effort.*

*We are going to ask several questions that are intended to help us explore DACL's brand and how people view the agency's work. Your insights are critical and, at any time, feel free to stop me and ask for clarity or to reframe a question. We are excited to talk with you and to see where this conversation takes us. Are you ready to begin?”*

1. Imagine you walk into an elevator and someone asks you: “What is the DC Department of Aging and Community Living?” What do you say?
2. In your own words, and in one or two sentences, what is DACL's mission?
3. Based on what you know about DACL, who are the populations they serve?
4. Why does this work matter? Why are you invested in DACL?
5. When you think of the DACL “brand” what comes to mind? Any specific words, images, colors?
6. We want to make sure that DACL partners and supporters are able to share the agency's new brand. Who do we need to include in our outreach as we roll out that new brand?
7. What is one wish you have for seniors, caregivers, and people with disabilities living in DC?
8. Is there a single best piece of advice you can provide as we develop DACL's new brand and key messages?

# Department of Aging and Community Living

Environmental Scan of Peer Units on Aging

July 2019



# Organizations Included

Our environmental scan examined seven peer units on aging that provide similar services and target similar audiences to the Department of Aging and Community Living (DACL). We reviewed the brand identity and storytelling approach of each to assemble a set of key insights to inform our branding work. The following entities are included in the scan:

1. San Francisco Department of Aging and Adult Services
2. Boston Age Strong Commission
3. empowerline (Atlanta Regional Commission Aging Division)
4. New York City Department for the Aging
5. Virginia Office for Aging Services, Division for Community Living
6. Maryland Department of Aging
7. Florida Department of Elder Affairs

# Driving Questions

For each unit on aging, we conducted a thorough review of their website and any reports, photos, and videos available through the site to address the following questions:

## 1. Mission and Tagline

- a. What is their mission or vision statement?
- b. What is their tagline, if any?

## 2. Core Responsibilities and Audiences

- a. How do they describe their work?
- b. Who are the primary audiences they serve?

## 3. Storytelling Approach

- a. How are they telling the story of their impact?
- b. Do they feature testimonials or success stories?

## 4. Logo Description

- a. Short analysis of visual logo style.

## 5. Brand Voice Analysis

- a. Apply spectrum from brand voice activity.

# Key Takeaways (1 of 2)

**Accessibility.** Many of the sites we reviewed overlook opportunities to boost accessibility and usability. We expected to see larger text, easy-to-find links, and video messages more often.

**Testimonials.** Specific and tangible testimonials can be uniquely powerful, especially when conveying a common issue or problem experienced by many constituents as well as the resolution provided by an agency.

**Audience-Centered Approach.** The most “usable” sites leverage an audience-centered approach to illustrate programs, services, and resources available to specific populations (rather than describing the hierarchy offices and departments within the unit, which may not resonate with people who aren’t deeply familiar with the agency).



# Key Takeaways (2 of 2)

**Photography.** Stock imagery (especially when used frequently) can make a website (and the corresponding agency) feel institutional and less community-oriented. When possible, incorporate actual photos of DC residents taken at DACL and partner events. Use neighborhood imagery of DC communities.

**Missed Opportunities.** The most frequent missed opportunities for leverage a brand to connect with particular audiences included the lack of a tagline and the reliance on an existing city or state seal accompanied by text as a logo.

**Consistency.** Be consistent with use of the new brand across all platforms, tailoring slightly based on context (web, social, printed collateral).



# San Francisco Department of Aging and Adult Services



City and County of San Francisco  
Department of Aging and Adult Services

**Mission:** DAAS coordinates services for older adults, veterans, people with disabilities, and their families to maximize safety, health, and independence. With a single call, you can learn about and apply for available services.

**Tagline:** Maximize safety, health, and independence.

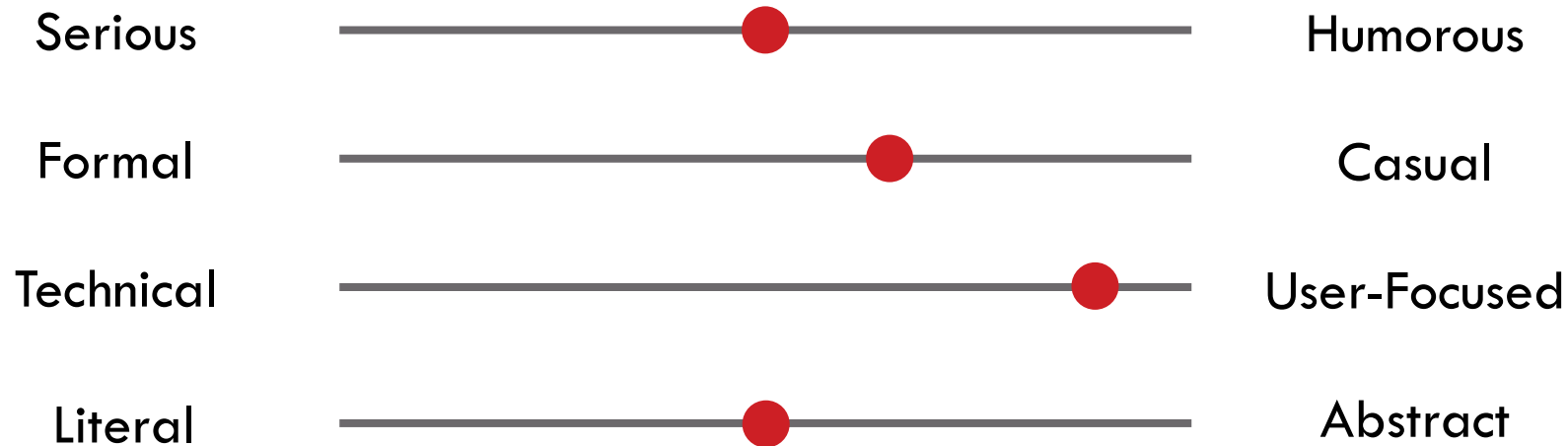
**Core Responsibilities:** Access and empowerment, care and support, connection and community, protection and safety, health and food

**Audiences:** Older adults, veterans, people with disabilities (including their families)

# San Francisco Department of Aging and Adult Services

**Storytelling Approach:** Heavy use of photos with little context, no written testimonials or success stories

**Logo Description:** Uses the city's seal with a word lockup; very traditional and conservative; misses an opportunity for connection



# New York City Department for the Aging



**Mission:** Our mission is to eliminate ageism and ensure the dignity and quality of life of diverse older adults. We also work to support caregivers through service, advocacy, and education.

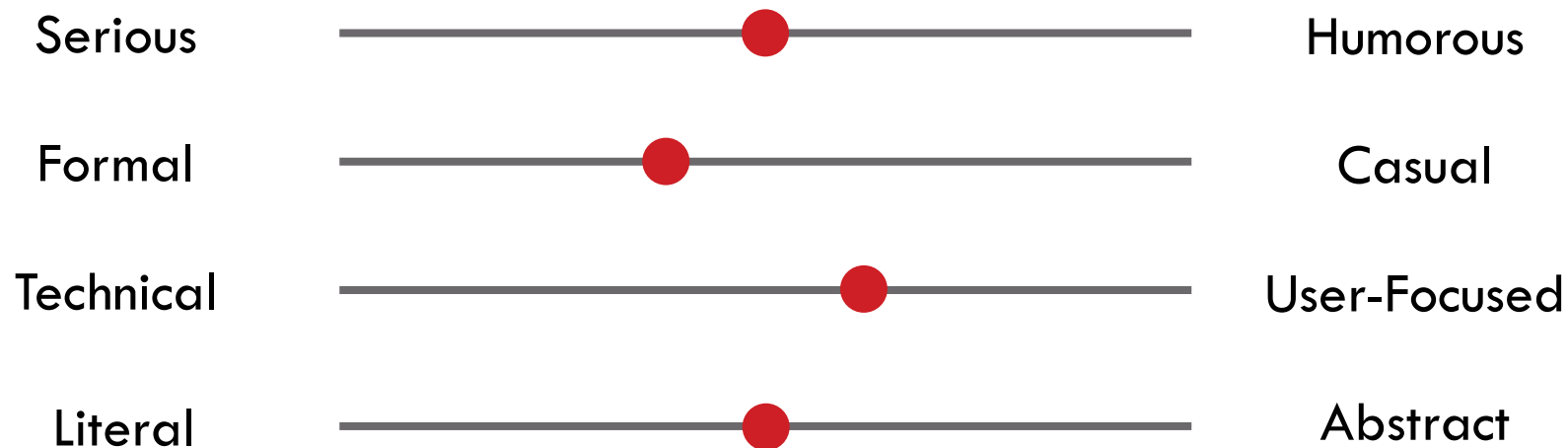
**Core Responsibilities:** Provide services through senior centers, naturally occurring retirement communities, case-management and home-care agencies, home-delivered meal programs, mental health and friendly visiting programs.

**Audiences:** Senior citizens, caregivers, grandparents

# New York City Department for the Aging

**Storytelling Approach:** Volunteer spotlights section conveys impact on real people; sparsely used images are a mix of stock and actual community members; video is used to highlight ThriveNYC, the city's mental health campaign

**Logo Description:** Bold, simple lettering in teal accompanied by the department's name in full; no frills and easy to read; mirrors city branding



# empowerline (Atlanta Regional Commission Aging Div.)



**Mission:** We are the front desk for people who need help navigating life changes and surprise obstacles in their homes, with their health, and in their communities. We can help connect you to privately and publicly funded resources from more than 26,000 community-based providers.

**Core Responsibilities:** Serve as the first point of contact for seniors and people with disabilities who need help learning about and navigating publicly available resources.

**Audiences:** Older Georgians and individuals with disabilities

**Storytelling Approach:** Heavy use of imagery tied to a specific person or story as a means to highlight services and resources; these stories serve as useful archetypes that help the audiences identify what information will be useful to them.

**Logo Description:** Modern, two-tone logo relying primarily on name while incorporating human-like element into the central “o”





# Boston Age Strong Commission



**Mission:** Our mission is to enhance your life with meaningful programs, resources, and connections so we can live and age strong in Boston together.

**Vision:** We envision a city that embraces aging.

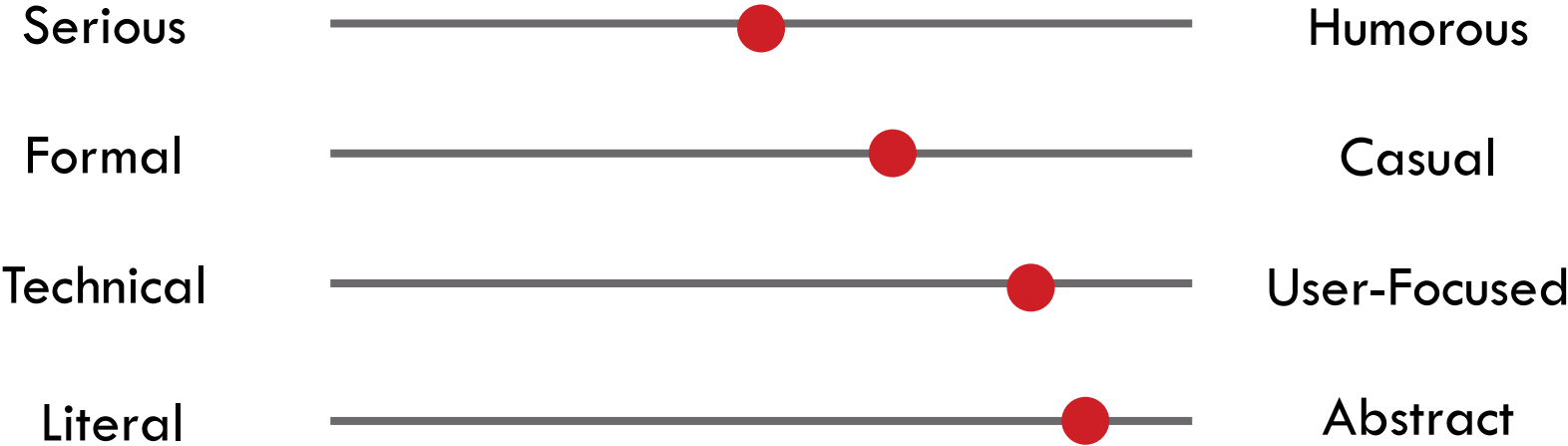
**Core Responsibilities:** Serve as a convening point for age-friendly initiatives in the city of Boston, including caregiver support, events and engagement, food resources, housing, transportation, volunteer opportunities and more.

**Audiences:** Bostonians who are 55+, caregivers

# Boston Age Strong Commission

**Storytelling Approach:** Good use of feature quotes that capture the impact on people and their enthusiasm for aging in Boston. Some include an actual attribution to a resident while others are a generic “older Boston resident.”

**Logo Description:** Minimalist approach to showing positivity around age, framed by a circle to indicate community, inclusiveness



# Virginia Office for Aging Services, Division for Community Living



**Mission:** The Division for Community Living fosters the independence and well-being of older Virginians and supports their caregivers through leadership, advocacy and oversight of state and community programs, and guides the Commonwealth in preparing for an aging population.

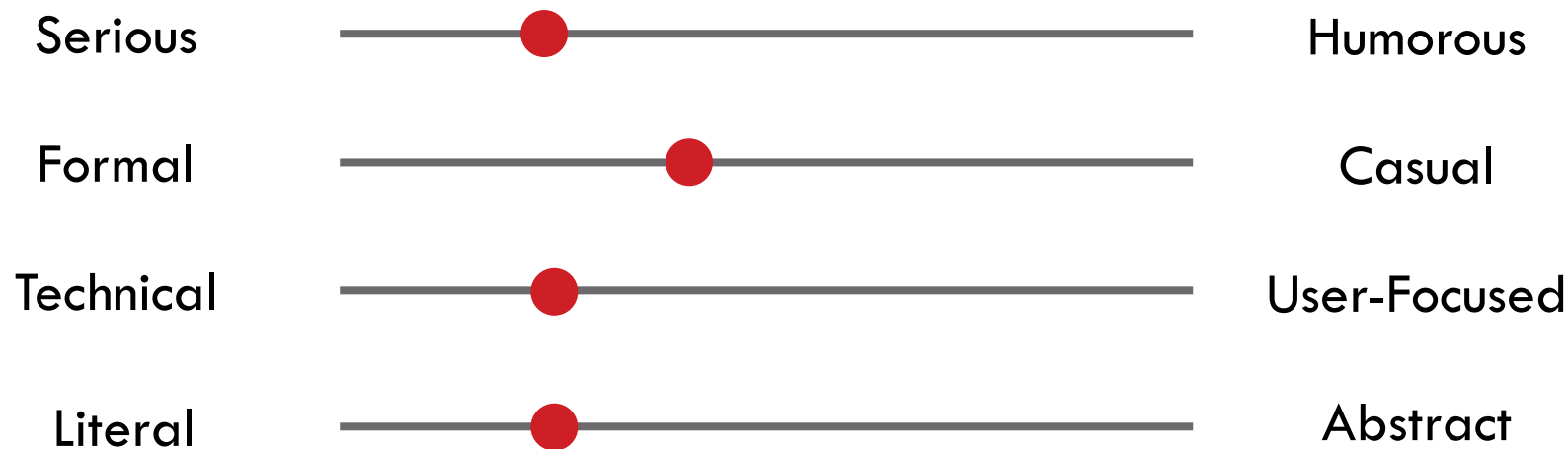
**Core Responsibilities:** Coordinate and provide services to help older Virginians live as independently as possible, oversee all state programs using federal funding flagged for older Americans.

**Audiences:** Aging Virginians, caregivers and their families

# Virginia Office for Aging Services, Division for Community Living

**Storytelling Approach:** Website does not use testimonials, quotes, or photos of people being served by their programs. When used, stock images are thematically relevant but generic looking.

**Logo Description:** Text-driven logo that includes three organizations (acronym for Department for Aging and Rehabilitative Services, the Division for Community Living, and the Office for Aging Services) in a mix of styles with the state outline and a rainbow-like arch



# Maryland Department of Aging



**Mission:** The Maryland Department of Aging helps establish Maryland as an attractive location for all older adults through vibrant communities and supportive services that offer the opportunity to live healthy and meaningful lives.

**Tagline:** Live Well, Age Well

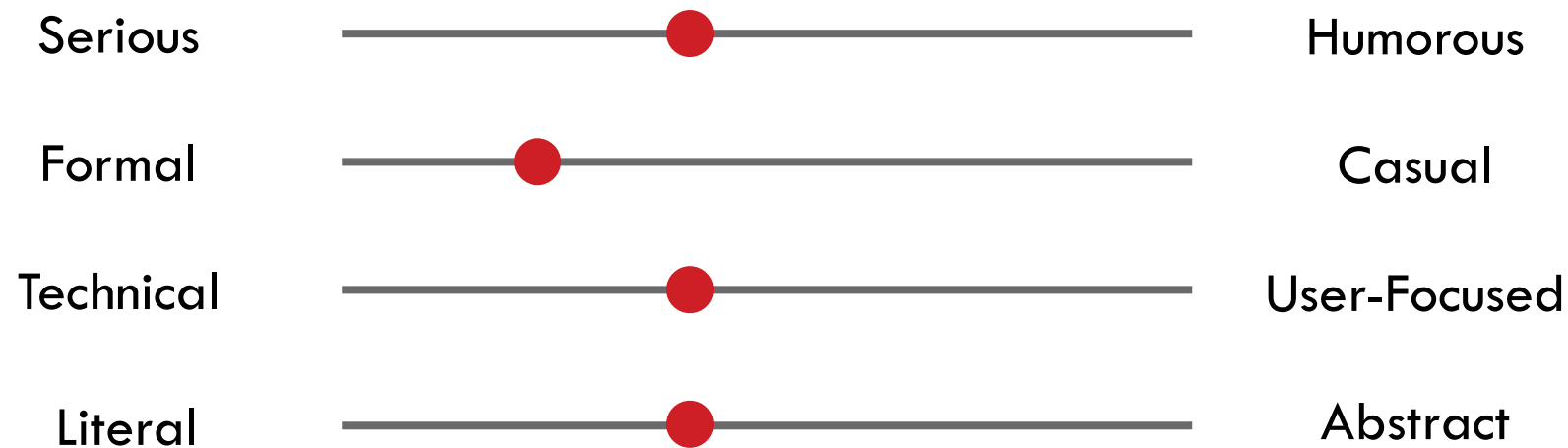
**Core Responsibilities:** Information and empowerment; community wellness, nutrition, and activities; long-term services and supports; elder rights protections

**Audiences:** Older adults, caregivers

# Maryland Department of Aging

**Storytelling Approach:** Occasional use of a thematically relevant stock image to compliment text-heavy materials. No use of testimonials or quotes from constituents.

**Logo Description:** Traditional approach using state's banner logo with complimentary text; use is inconsistent from web to social platforms



# Florida Department of Elder Affairs



**Mission:** To help Florida's elders remain healthy, safe, and independent.

**Tagline:** All Floridians aging with dignity, purpose, and independence.

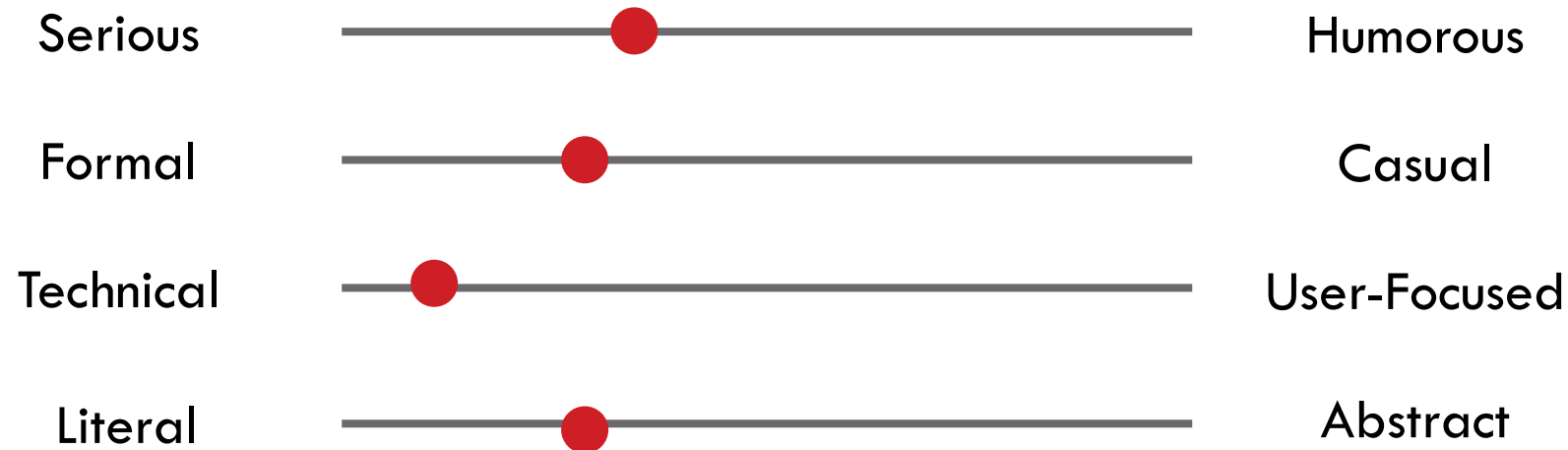
**Core Responsibilities:** Assessments for long-term care services, protection for vulnerable populations, promotion of compassion for elders, food and nutrition programs, ombudsman services

**Audiences:** Elders (60+), caregivers

# Florida Department of Elder Affairs

**Storytelling Approach:** No use of testimonials, quotes, videos, or images of people impacted by programs. Programs and services are presented in a bulleted, alphabetical list.

**Logo Description:** Bold blue text accompanied by the state outline, also in blue, with a series of radiating bars to evoke a feeling a light, sunshine, and warmth





# Next Steps

This report is intended to help us form a shared understanding of the branding and storytelling approaches of peer units on aging. In the coming weeks, we'll use the insights from this report, as well as insights from our strategy conversations and other research, to inform the development of DACL's brand and rollout strategy.

If there are additional agencies or organizations that LINK should review, we are happy to expand and enhance this document as needed. We look forward to continuing our research to inform the creation of DACL's core messages, success stories, and outreach strategies to deploy the agency's new brand in a clear and compelling way.

**Attachment**

<b>Name</b>	<b>Program &amp; Activity Name</b>	<b>Activity Code</b>	<b>Program Code</b>
Newland,Laura S	Agency Management Services	1000	1010
Stowe,Heather	Home and Community Based Support	9400	9430
Delespin,Aurora L	Agency Management Services	1000	1010
King,Garret	Agency Management Services	1000	1010
Mingal,Adam Branden	Agency Management Services	1000	1010
Barrera-Mercado,Cristian E.	Agency Management Services	1000	1010
Frazier,Michelle K	Agency Management Services	1000	1010
Dorbin,Karen	Consumer Info., Assistance and Outreach	9200	9230
Manuel,Eric D	Agency Management Services	1000	1010
Craig,Clarence F	Agency Management Services	1000	1010
Richardson-Dalzell,Elaine	Home and Community Based Support	9400	9430
Crowder,Maxine R	Agency Management Services	1000	1010
Richardson,Angela Maria	Home and Community Based Support	9400	9430
Jerrels,Alesia	Agency Management Services	1000	1010
Hagos,Regat G.	Agency Management Services	1000	1010
Lyles,Yolanda	Agency Management Services	1000	1010
Sanga,Nkwenti Patrick	Agency Management Services	1000	1010
Smith,Teresa Belinda	Agency Management Services	1000	1010
Akinkuowo,Eniola O	Agency Management Services	1000	1010
Baktash,Sina	Agency Management Services	1000	1010
Thompson,Alice Arcenia	Consumer Info., Assistance and Outreach	9200	9215
Woods,Margaret L	Home and Community Based Support	9400	9430
Brewer,Barbara Jane	Agency Management Services	1000	1010
Oloughlin,Charlayne Letitia	Agency Management Services	1000	1010

† Q29 - Salaries (FY2020)

Title	Position Number	Salary	FY20 Fringe (22.3%)	Bonus/OT
Director	00019749	\$ 189,193.53	\$ 42,190.16	N/A
Clinical Director	00093373	\$ 164,800.00	\$ 36,750.40	N/A
Deputy Director	00095085	\$ 159,395.98	\$ 35,545.30	N/A
Chief of Staff	00071576	\$ 150,979.62	\$ 33,668.46	N/A
General Counsel	00087790	\$ 138,943.95	\$ 30,984.50	N/A
Deputy Chief of Staff	00097135	\$ 129,411.26	\$ 28,858.71	N/A
Program Manager	00093755	\$ 129,411.00	\$ 28,858.65	N/A
Director of Communications	00073400	\$ 125,000.00	\$ 27,875.00	N/A
Program Manager	00088689	\$ 118,450.00	\$ 26,414.35	N/A
SUPERVISORY SOCIAL WORKER	00099712	\$ 115,861.99	\$ 25,837.22	N/A
SUPERVISORY SOCIAL WORKER	00099838	\$ 115,000.00	\$ 25,645.00	N/A
Program Analyst	00016920	\$ 113,002.00	\$ 25,199.45	N/A
Deputy Director of Communications	00047119	\$ 113,000.00	\$ 25,199.00	N/A
SUPERVISORY SOCIAL WORKER	00099841	\$ 113,000.00	\$ 25,199.00	N/A
Resource Allocation Analyst (Team Lead)	00071542	\$ 110,297.00	\$ 24,596.23	N/A
IT Specialist	00075452	\$ 110,297.00	\$ 24,596.23	N/A
Resource Allocation Analyst	00001984	\$ 107,380.00	\$ 23,945.74	N/A
Social Worker	00099700	\$ 105,339.00	\$ 23,490.60	N/A
Social Worker	00099721	\$ 105,339.00	\$ 23,490.60	N/A
SUPERVISORY SOCIAL WORKER	00099710	\$ 104,201.88	\$ 23,237.02	N/A
Community Outreach Specialist	00046346	\$ 101,758.00	\$ 22,692.03	N/A
Program Coordinator	00077732	\$ 101,758.00	\$ 22,692.03	N/A
Social Worker	00099713	\$ 100,225.00	\$ 22,350.18	\$ 3,079.17
Social Worker	00099715	\$ 100,225.00	\$ 22,350.18	N/A

**COMPENSATION COLLECTIVE BARGAINING  
AGREEMENT**

**BETWEEN**

**THE DISTRICT OF COLUMBIA GOVERNMENT**

**AND**

**COMPENSATION UNITS 1 AND 2**

**EFFECTIVE October 1, 2017 through September 30, 2021**

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(July 26, 2010)	

## **PREAMBLE**

This Compensation Agreement is entered into between the Government of the District of Columbia and the undersigned labor organizations representing units of employees comprising Compensation Units 1 and 2, as certified by the Public Employee Relations Board (PERB).

The Agreement was reached after negotiations during which the parties were able to negotiate on any and all negotiable compensation issues, and contains the full agreement of the parties as to all such compensation issues. The Agreement shall not be reconsidered during its life nor shall either party make any changes in compensation for the duration of the Agreement unless by mutual consent or as required by law.

## **ARTICLE 1: WAGES**

### **SECTION A: FISCAL YEAR 2018:**

Effective the first day of the first full pay period beginning on or after October 1, 2017, the FY 2018 salary schedules of employees employed in bargaining units as certified and assigned to Compensation Units 1 and 2 by the Public Employees Relations Board shall be adjusted by 3%.

### **SECTION B: FISCAL YEAR 2019:**

Effective the first day of the first full pay period beginning on or after October 1, 2018, the FY 2019 salary schedules of employees employed in bargaining units as certified and assigned to Compensation Units 1 & 2 by the Public Employees Relations Board shall be adjusted by 2%.

### **SECTION C: FISCAL YEAR 2020:**

Effective the first day of the first full pay period beginning on or after October 1, 2019, the FY 2020 salary schedules of employees employed in bargaining units as certified and assigned to Compensation Units 1 & 2 by the Public Employees Relations Board shall be adjusted by 3%.

### **SECTION D: FISCAL YEAR 2021:**

1. Effective the first day of the first full pay period beginning on or after October 1, 2020, the FY 2021 salary schedules of employees employed in bargaining units as certified and assigned to Compensation Units 1 & 2 by the Public Employees Relations Board shall be adjusted by 3.5%.

2. A portion of the cost of the District's proposal to increase wages for FY 18 – 3%, FY 19 – 2%, FY 20 – 3%, and FY 20 – 3.5% will be paid for from a portion of the funds set aside by the Bowser Administration for Compensation and Classification Reform. As a result, the Union will withdraw its Compensation and Classification Reform grievances in their entirety (both master and individual grievances).

**ARTICLE 2: METRO PASS**

The District of Columbia Government shall subsidize the cost of monthly transit passes for personal use by employees by not less than fifty (\$50.00) per month for employees who purchase and use such passes to commute to and from work. The metro transit benefit will roll over from month to month for employees who access the benefit. Any benefit not accessed by the end of the calendar year will revert back to the District of Columbia government.

**ARTICLE 3: PRE-PAID LEGAL PLAN**

**SECTION A:**

The Employer shall make a monthly contribution of twelve dollars and fifty cents (\$12.50) in FY 2018 for each bargaining unit member toward a pre-paid legal services plan. The Employer shall make a monthly contribution of fifteen dollars (\$15.00) in FY 2019 for each bargaining unit member toward a pre-paid legal services plan. The Employer shall make a monthly contribution of seventeen dollars and fifty cents (\$17.50) in FY 20 for each bargaining unit member toward a pre-paid legal services plan. For each fiscal year, the Employer shall make monthly contributions directly to the designated provider of the legal services program.

**SECTION B:**

The plan shall be contracted for by the Union subject to a competitive bidding process where bidders are evaluated and selected by the Union. The District may present a proposed contract which shall be evaluated on the same basis as other bidders. The contract shall provide that the Employer will be held harmless from any liability arising out of the implementation and administration of the plan by the benefit provider, that the benefit provider will supply utilization statistics to the Employer and the Union upon request for each year of the contract, and that the benefit provider shall bear all administrative costs.

**SECTION C:**

The parties shall meet to develop procedures to implement the legal plan which shall be binding upon the benefit provider. The procedures shall include an enrollment process.

**SECTION D:**

To be selected for a contract under this Article, the benefit provider must maintain an office in the District of Columbia; be incorporated in the District and pay a franchise tax and other applicable taxes; have service providers in the District; and maintain a District bank account.

**SECTION E:**

The Employer's responsibility under the terms of this Article shall be as outlined in Section C of this Article and to make premium payments as is required under Section A of this Article. To the extent that any disputes or inquiries are made by the legal services provider chosen by the Union, those inquiries shall be made exclusively to the Union. The Employer shall only be required to communicate with the Union to resolve any disputes that may arise in the administration of this Article.

**ARTICLE 4:           DISTRICT OF COLUMBIA NEGOTIATED EMPLOYEE ASSISTANCE HOME PURCHASE PROGRAM**

**SECTION A:**

The Parties shall continue the Joint Labor-Management Taskforce on Employee Housing.

**SECTION B:**

Pursuant to the DPM, Part 1, Chapter 3 §301, the District provides a preference for District residents in employment. In order to encourage employees to live and work in the District of Columbia, a joint Labor-Management Task Force on Employee Housing was established during previous negotiations with Compensation Units 1 & 2. The Taskforce strives to inform employees of the programs currently available for home ownership in the District of Columbia. Additionally, the Taskforce collaborates with other government agencies including the Department of Housing and Community Development and the District's Housing Finance Agency to further affordable housing opportunities for bargaining unit employees, who have been employed by the District Government for at least one year.

**SECTION C:**

The parties agree that \$500,000.00 will be set aside to be used toward Negotiated employee Assistance Home Purchase Program (NEAHP) for the duration of the Agreement. If at any time the funds set aside have been depleted, the Parties will promptly convene negotiations to provide additional funds for the program.

**SECTION D:**

Any funds set aside in Fiscal Years 2018, 2019, 2020, and 2021 shall be available for expenditure in that fiscal year or any other fiscal year covered by the Compensation Units 1 and 2 Agreement. All funds set aside for housing incentives shall be expended or obligated prior to the expiration of the Compensation Units 1 and 2 Agreement for FY 2018 – FY 2021.



## **ARTICLE 5: BENEFITS COMMITTEE**

### **SECTION A:**

The parties agree to continue their participation on the District's Joint Labor-Management Benefits Committee for the purpose of addressing the benefits of employees in Compensation Units 1 and 2. The Benefits Committee shall meet quarterly, in January, April, July and October of each year.

### **SECTION B: RESPONSIBILITIES:**

The Parties shall be authorized to consider all matters that concern the benefits of employees in Compensation Units 1 and 2 that are subject to mandatory bargaining between the parties. The Parties shall be empowered to address such matters only to the extent granted by the Unions in Compensation Units 1 and 2 and the District of Columbia Government. The parties agree to apply a system of expedited arbitration if necessary to resolve issues that are subject to mandatory bargaining. The Committee may, by consensus, discuss and consider other benefit issues that are not mandatory bargaining subjects.

### **SECTION C:**

The Committee shall:

1. Monitor the quality and level of services provided to covered employees under existing Health, Optical and Dental Insurance Plans for employees in Compensation Units 1 and 2.
2. Recommend changes and enhancements in Health, Optical and Dental benefits for employees in Compensation Units 1 and 2 consistent with Chapter 6, Subchapter XXI of the D.C. Official Code (2001 ed.).
3. With the assistance of the Office of Contracting and Procurement, evaluate criteria for bids, make recommendations concerning the preparation of solicitation of bids and make recommendations to the contracting officer concerning the selection of providers following the receipt of bids, consistent with Chapter 4 of the D.C. Official Code (2001 ed.).
4. Following the receipt of bids to select health, dental, optical, life and disability insurance providers, the Union's Chief Negotiator shall be notified to identify no more than two individuals to participate in the RFP selection process.
5. Explore issues concerning the workers' compensation system that affect employees in Compensation Units 1 and 2 consistent with Chapter 6, Subchapter XXIII of the D.C. Official Code (2001 ed.).

6. The Union shall be notified of proposed benefit programs to determine the extent to which they impact employees in Compensation Units 1 and 2. Upon notification, the Union shall inform the Office of Labor Relations and Collective Bargaining within ten (10) calendar days to discuss any concerns it has regarding the impact on employees in Compensation Units 1 and 2.

**ARTICLE 6:            BENEFITS**

**SECTION A:            LIFE INSURANCE:**

1. Life insurance is provided to covered employees in accordance with §1-622.01, *et seq.* of the District of Columbia Official Code (2001 Edition) and Chapter 87 of Title 5 of the United States Code.

(a) District of Columbia Official Code §1-622.03 (2001 Edition) requires that benefits shall be provided as set forth in §1-622.07 to all employees of the District first employed after September 30, 1987, except those specifically excluded by law or by rule.

(b) District of Columbia Official Code §1-622.01 (2001 Edition) requires that benefits shall be provided as set forth in Chapter 87 of Title 5 of the United States Code for all employees of the District government first employed before October 1, 1987, except those specifically excluded by law or rule and regulation.

2. The current life insurance benefits for employees hired on or after October 1, 1987 are: The District of Columbia provides life insurance in an amount equal to the employee's annual salary rounded to the next thousand, plus an additional \$2,000. Employees are required to pay two-thirds (2/3) of the total cost of the monthly premium. The District Government shall pay one-third (1/3) of the total cost of the premium. Employees may choose to purchase additional life insurance coverage through the District Government. These additions to the basic coverage are set-forth in the schedule below:

Optional Plan	Additional Coverage	Premium Amount
Option A – Standard	Provides \$10,000 additional coverage	Cost determined by age
Option B – Additional	Provides coverage up to five times the employee's annual salary	Cost determined by age and employee's salary
Option C – Family	Provides \$5,000 coverage for the eligible spouse and \$2,500 for each eligible child.	Cost determined by age.

Employees must contact their respective personnel offices to enroll or make changes in their life insurance coverage.

**SECTION B:           HEALTH INSURANCE:**

1. Pursuant to D.C. Official Code §1-621.02 (2001 Edition), all employees covered by this agreement and hired after September 30, 1987, shall be entitled to enroll in group health insurance coverage provided by the District of Columbia.

(a) Health insurance coverage shall provide a level of benefits comparable to the plan(s) provided on the effective date of this agreement. Benefit levels shall not be reduced during the term of this agreement except by mutual agreement of the District, representatives of Compensation Units 1 and 2 and the insurance carrier(s). District employees are required to execute an enrollment form in order to participate in this program.

(b) The District may elect to provide additional health care providers for employees employed after September 30, 1987, provided that such addition of providers does not reduce the current level of benefits provided to employees. Should the District Government decide to expand the list of eligible providers, the District shall give Compensation Units 1 & 2 representatives notice of the proposed additions.

(c) Employees are required to contribute 25% of the total premium cost of the employee's selected plan. The District of Columbia Government shall contribute 75% of the premium cost of the employee's selected plan.

2. Pursuant to D.C. Official Code §1-621.01 (2001 Edition), all District employees covered by this agreement and hired before October 1, 1987, shall be eligible to participate in group health insurance coverage provided through the Federal Employees Health Benefits Program (FEHB) as provided in Chapter 89 of Title 5 of the United States Code. This program is administered by United States Office of Personnel Management.

3. The plan descriptions shall provide the terms of coverage and administration of the respective plans. Employees and union representatives are entitled to receive a copy of the summary plan description upon request. Additionally, employees and union representatives are entitled to review copies of the actual plan description upon advance request.

**SECTION C:           OPTICAL AND DENTAL:**

1. The District shall provide Optical and Dental Plan coverage at a level of benefits comparable to the plan(s) provided on the effective date of this agreement. Benefit levels shall not be reduced during the term of this agreement except by mutual agreement of the District, the Union and the insurance carrier(s). District employees are required to execute an enrollment form in order to participate in the Optical and Dental program.

2. The District may elect to provide additional Optical and/or Dental providers, provided that such addition of providers does not reduce the current level of benefits provided to employees. Should the District Government decide to expand the list of eligible providers, the District shall give Compensation Units 1 & 2 representatives notice of the proposed additions.

**SECTION D:            SHORT-TERM DISABILITY INSURANCE PROGRAM**

Employees covered by this Agreement shall be eligible to enroll, at their own expense, in the District's Short-Term Disability Insurance Program, which provides for partial income replacement when employees are required to be absent from duty due to a non-work-related qualifying medical condition. Employees may use income replacement benefits under the program in conjunction with annual or sick leave benefits provided for in this Agreement.

**SECTION E:            ANNUAL LEAVE:**

1. In accordance with D.C. Official Code §1-612.03 (2001 Edition), full-time employees covered by the terms of this agreement are entitled to:

(a) one-half (1/2) day (4 hours) for each full biweekly pay period for an employee with less than three years of service (accruing a total of thirteen (13) annual leave days per annum);

(b) three-fourths (3/4) day (6 hours) for each full biweekly pay period, except that the accrual for the last full biweekly pay period in the year is one and one-fourth days (10 hours), for an employee with more than three (3) but less than fifteen (15) years of service (accruing a total of twenty (20) annual leave days per annum); and,

(c) one (1) day (8 hours) for each full biweekly pay period for an employee with fifteen (15) or more years of service (accruing a total of twenty-six (26) annual leave days per annum).

2. Part-time employees who work at least 40 hours per pay period earn annual leave at one-half the rate of full-time employees.

3. Employees shall be eligible to use annual leave in accordance with the District of Columbia laws.

**SECTION F:            SICK LEAVE:**

1. In accordance with District of Columbia Official Code §1-612.03 (2001 Edition), a full-time employee covered by the terms of this agreement may accumulate up to thirteen (13) sick days in a calendar year.

2. Part-time employees for whom there has been established in advance a regular tour of duty of a definite day or hour of any day during each administrative workweek of the biweekly pay period shall earn sick leave at the rate of one (1) hour for each twenty (20) hours of duty. Credit may not exceed four (4) hours of sick leave for 80 hours of duty in any pay period. There is no credit of leave for fractional parts of a biweekly pay period either at the beginning or end of an employee's period of service.

**SECTION G:            OTHER FORMS OF LEAVE:**

1.     **Military Leave:** An employee is entitled to leave, without loss of pay, leave, or credit for time of service as reserve members of the armed forces or as members of the National Guard to the extent provided in D.C. Official Code §1-612.03(m) (2001 Edition).

2.     **Court Leave:** An employee is entitled to leave, without loss of pay, leave, or service credit during a period of absence in which he or she is required to report for jury duty or to appear as a witness on behalf of the District of Columbia Government, or the Federal or a state or local government to the extent provided in D.C. Official Code §1-612.03(l) (2001 Edition).

3.     **Funeral Leave:**

    a.     An employee is entitled to three (3) days of leave, without loss of pay, leave, or service credit to make arrangements for or to attend the funeral or memorial service for an immediate relative. In addition, the Employer shall grant an employee's request for annual or compensatory time up to three (3) days upon the death of an immediate relative. Approval of additional time shall be at the Employer's discretion. However, requests for leave shall be granted unless the Agency's ability to accomplish its work would be seriously impaired.

    b.     For the purpose of this section "immediate relative" means the following relatives of the employee: an individual who is related to the employee by blood, marriage, adoption, or domestic partnership as father, mother, child, husband, wife, sister, brother, aunt, uncle, grandparent, grandchild, or similar familial relationship; an individual for whom the employee is the legal guardian; or fiancé, fiancée, or domestic partner of the employee.

    c.     An employee is entitled to not more than three (3) days of leave, without loss of pay, leave, or service credit to make arrangements for or to attend the funeral or memorial service for a family member who died as a result of a wound, disease or injury incurred while serving as a member of the armed forces in a combat zone to the extent provided in D.C. Official Code §1-612.03(n) (2001 Edition).

**SECTION H:            PRE-TAX BENEFITS:**

1. Employee contributions to benefits programs established pursuant to D.C. Official Code §1-611.19 (2001 ed.), including the District of Columbia Employees Health Benefits Program, may be made on a pre-tax basis in accordance with the requirements of the Internal Revenue Code and, to the extent permitted by the Internal Revenue Code, such pre-tax contributions shall not effect a reduction of the amount of any other retirement, pension, or other benefits provided by law.

2. To the extent permitted by the Internal Revenue Code, any amount of contributions made on a pre-tax basis shall be included in the employee's contributions to existing life insurance, retirement system, and for any other District government program keyed to the employee's scheduled rate of pay, but shall not be included for the purpose of computing Federal or District income tax withholdings, including F.I.C.A., on behalf of any such employee.

**SECTION I:            RETIREMENT:**

**1.        CIVIL SERVICE RETIREMENT SYSTEM (CSRS):** As prescribed by 5 U.S.C. §8401 and related chapters, employees first hired by the District of Columbia Government before October 1, 1987, are subject to the provisions of the CSRS, which is administered by the U.S. Office of Personnel Management. Under Optional Retirement the aforementioned employee may choose to retire when he/she reaches:

- (a)      Age 55 and 30 years of service;
- (b)      Age 60 and 20 years of service;
- (c)      Age 62 and 5 years of service.

Under Voluntary Early Retirement, which must be authorized by the U.S. Office of Personnel Management, an employee may choose to retire when he/she reaches:

- (a)      Age 50 and 20 years of service;
- (b)      Any age and 25 years of service.

The pension of an employee who chooses Voluntary Early Retirement will be reduced by 2% for each year under age 55.

**2.        CIVIL SERVICE RETIREMENT SYSTEM: SPECIAL RETIREMENT PROVISIONS FOR LAW ENFORCEMENT OFFICERS:**

Employees first hired by the District of Columbia Government before October 1, 1987, who are subject to the provisions of the CSRS and determined to be:

- (a) a “law enforcement officer” within the meaning of 5 U.S.C. §8331(20)(D); and
- (b) eligible for benefits under the special retirement provision for law enforcement officers;

shall continue to have their retirement benefits administered by the U. S. Office of Personnel Management in accordance with applicable law and regulation.

**3.        DEFINED CONTRIBUTION PENSION PLAN:**

Section A:

The District of Columbia shall continue the Defined Contribution Pension Plan currently in effect which includes:

- (1)      All eligible employees hired by the District on or after October 1, 1987, are enrolled into the defined contribution pension plan.

(2) As prescribed by §1-626.09(c) of the D.C. Official Code (2001 Edition) after the completion of one year of service, the District shall contribute an amount not less than 5% of their base salary to an employee's Defined Contribution Pension Plan account. The District government funds this plan; there is no employee contribution to the Defined Contribution Pension Plan.

(3) As prescribed by §1-626.09(d) of the D.C. Official Code (2001 Edition) the District shall contribute an amount not less than an additional .5% of a detention officer's base salary to the same plan.

(4) Compensation Units 1 and 2 Joint Labor Management Technical Advisory Pension Reform Committee

(a) Establishment of the Joint Labor-Management Technical Advisory Pension Reform Committee (JLMTAPRC or Committee)

(1) The Parties agree that employees should have the security of a predictable level of income for their retirement after a career in public service. In order to support the objective of providing retirement income for employees hired on or after October 1, 1987, the District shall plan and implement an enhanced retirement program effective October 1, 2008. The enhanced program will consist of a deferred compensation component and a defined benefit component.

(2) Accordingly, the Parties agree that the JLMTAPRC is hereby established for the purpose of developing an enhanced retirement program for employees covered by the Compensation Units 1 and 2 Agreement.

(b) Composition of the JLMTAPRC

The Joint Labor-Management Technical Advisory Pension Reform Committee will be composed of six (6) members, three (3) appointed by labor and three (3) appointed by management, and the Chief Negotiators (or his/her designee) of Compensation Units 1 and 2. Appointed representatives must possess a pension plan background including but not limited to consulting, financial or actuarial services. In addition, an independent consulting firm with demonstrated experience in pension plans design and actuarial analysis will support the Committee.

(c) Responsibilities of the JLMTAPRC

The Committee shall be responsible to:

- Plan and design an enhanced retirement program for employees hired on or after October 1, 1987 with equitable sharing of costs and risks between employee and employer;
- Establish a formula cap for employee and employer contributions;
- Establish the final compensation calculation using the highest three-year consecutive average employee wages;
- Include retirement provisions such as disability, survivor and death benefits, health and life insurance benefits;
- Design a plan sustainable within the allocated budget;
- Draft and support legislation to amend the D.C. Code in furtherance of the “Enhanced Retirement Program.”

(d) Duration of the Committee

The Committee shall complete and submit a report with its recommendations to the City Administrator for the District of Columbia within one hundred and twenty (120) days after the effective date of the Compensation Units 1 and 2 Agreement.

**4. TIAA-CREF PLAN:**

For eligible education service employees at the University of the District of Columbia hired by the University or a predecessor institution, the University will contribute an amount not less than seven percent (7%) of their base salary to the Teachers Insurance and Annuity Association College Retirement Equities Fund (TIAA-CREF).

**SECTION J: HOLIDAYS:**

1. As prescribed by D.C. Official Code §1-612.02 (2001 Edition) the following legal public holidays are provided to all employees covered by this agreement:

- (a) New Year's Day, January 1st of each year;
- (b) Dr. Martin Luther King, Jr.'s Birthday, the 3rd Monday in January of each year;
- (c) Washington's Birthday, the 3rd Monday in February of each year;
- (d) Emancipation Day, April 16<sup>th</sup>;
- (e) Memorial Day, the last Monday in May of each year;
- (f) Independence Day, July 4th of each year;
- (g) Labor Day, the 1st Monday in September of each year;
- (h) Columbus Day, the 2nd Monday in October of each year;
- (i) Veterans Day, November 11th of each year;
- (j) Thanksgiving Day, the 4th Thursday in November of each year;
- (k) Christmas Day, December 25th of each year; and
- (l) Inauguration Day, January 20<sup>th</sup> of each 4<sup>th</sup> year



2. When an employee, having a regularly scheduled tour of duty is relieved or prevented from working on a day District agencies are closed by order of the Mayor, he or she is entitled to the same pay for that day as for a day on which an ordinary day's work is performed.

**ARTICLE 7: OVERTIME**

**SECTION A: Overtime Work:**

Hours of work authorized in excess of an employees assigned tour of duty in a day or forty (40) hours in a pay status in a work week shall be overtime work for which an employee shall receive either overtime pay or compensatory time unless the employee has used unscheduled leave during the forty (40) hour work week. The unscheduled leave rule will not apply when an employee has worked (back-to-back shifts) and takes unscheduled leave for an eight (8) hour period following the back-to-back shift or where an employee has indicated his/her preference not to work overtime and the Employer has no other option but to order the employee to work overtime. Scheduled leave is leave requested and approved prior to the close of the preceding shift.

**SECTION B: Compressed, Alternate and Flexible Schedules:**

1. Compressed, Alternate and Flexible schedules may be jointly determined within a specific work area that modifies this overtime provision (as outlined in Section A of this Article) but must be submitted to the parties to this contract prior to implementation. This Agreement to jointly determine compressed schedules does not impact on the setting of the tour of duty.

2. When an employee works a Compressed, Alternate, and Flexible schedule, which generally means (1) in the case of a full-time employee, an 80-hour biweekly basic work requirement which is scheduled for less than 10 workdays, and (2) in the case of a part-time employee, a biweekly basic work requirement of less than 80 hours which is scheduled for less than 10 workdays, the employee would receive overtime pay or compensatory time for all hours in a pay status in excess of his/her assigned tour of duty, consistent with the 2004 District of Columbia Omnibus Authorization Act, 118 Stat. 2230, Pub. L. 108-386 Section (October 30, 2004).

2. The purpose of this Section is to allow for authorized Compressed, Alternate, and Flexible time schedules which exceed eight (8) hours in a day or 40 hours in a week to be deemed the employee's regular tour of duty, and not be considered overtime within the confines of the specific compressed work schedule and this Article. Bargaining unit members so affected would receive overtime or compensatory time for all hours in pay status in excess of their assigned tour of duty.

**SECTION C:**

Subject to the provisions of Section D of this Article, an employee who performs overtime work shall receive either pay or compensatory time at a rate of time and one-half (1-1/2) for each hour of work for which overtime is payable.

**SECTION D:**

Bargaining Unit employees shall receive overtime pay unless the employee and the supervisor mutually agree to compensatory time in lieu of pay for overtime work. Such mutual agreement shall be made prior to the overtime work being performed.

**SECTION E:**

Paramedics and Emergency Medical Services Technicians employed by the Fire and Emergency Medical Services Department and represented by the American Federation of Government Employees, Local 3721 shall earn overtime after they have worked 40 hours in a week.

**ARTICLE 8:           INCENTIVE PROGRAMS**

**PART I - SICK LEAVE INCENTIVE PROGRAM:**

In order to recognize an employee's productivity through his/her responsible use of accrued sick leave, the Employer agrees to provide time-off in accordance with the following:

**SECTION A:**

A full time employee who is in a pay status for the full calendar leave year shall accrue annually:

1.       Three (3) days off for utilizing a total of no more than two (2) days of accrued sick leave.
2.       Two (2) days off for utilizing a total of more than two (2) but not more than four (4) days of accrued sick leave.
3.       One (1) day off for utilizing a total of more than four (4) but no more than five (5) days of accrued sick leave.

**SECTION B:**

Employees in a non-pay status for no more than two (2) pay periods for the leave year shall remain eligible for incentive days under this Article. Sick leave usage for maternity or catastrophic illness/injury, not to exceed two (2) consecutive pay periods, shall not be counted against sick leave for calculating eligibility for incentive leave under this Article.

**SECTION C:**

Time off pursuant to a sick leave incentive award shall be selected by the employee and requested at least three (3) full workdays in advance of the leave date. Requests for time off pursuant to an incentive award shall be given priority consideration and the employee's supervisor shall approve such requests for time off unless staffing needs or workload considerations dictate otherwise. If the request is denied, the employee shall request and be granted a different day off within one month of the date the employee initially requested. Requests for time off shall be made on the standard "Application for Leave" form.

**SECTION D:**

All incentive days must be used in full-day increments following the leave year in which they were earned. The Employer will notify the employee of their sick leave incentive day(s) no later than March of each year. Incentive days may not be substituted for any other type of absence from duty. There shall be no carryover or payment for any unused incentive days.

**SECTION E:**

Part-time employees are not eligible for the sick leave incentive as provided in this Article.

**SECTION F:**

This program shall be in effect in Fiscal Years, 2018, 2019, 2020 and 2021.

**PART II – PERFORMANCE INCENTIVE PILOT PROGRAM:**

In order to recognize employees' productivity through their accomplishment of established goals and objectives, special acts toward the accomplishment of agency initiatives, demonstrated leadership in meeting agency program and/or project goals and/or the District's Strategic Plan initiatives, the Employer, in accordance with criteria established by the High Performance Workplace Committee agrees to establish pilot incentive programs within agencies, including time off without loss of pay or charge to leave as an incentive award. The District of Columbia Government Office of Labor Management Partnerships and the District of Columbia Incentive Awards Committee may serve as resources at the request of the parties in the implementation of the pilot incentive programs within agencies.

**ARTICLE 9            CALL-BACK/CALL-IN/ON-CALL AND PREMIUM PAY**

**SECTION A:            CALL-BACK**

A minimum of four (4) hours of overtime, shall be credited to any employee who is called back to perform unscheduled overtime work on a regular workday after he/she completes the regular work schedule and has left his/her place of employment

**SECTION B:            CALL-IN**

1. When an employee is called in before his/her regular tour of duty to perform unscheduled overtime and there is no break before the regular tour is to begin, a minimum of two (2) hours of overtime shall be credited to the employee.

2. A minimum of four (4) hours of overtime work shall be credited to any employee who is called in when not scheduled and informed in advance, on one of the days when he/she is off duty.

**SECTION C:            ON-CALL**

1. An employee may be required to be on call after having completed his/her regular tour of duty. The employer shall specify the hours during which the employee is on call; and shall compensate the employee at a rate of twenty-five percent (25%) of his/her basic rate of pay for each hour the employee is on call.

2. An employee is on-call when a determination has been made that the work of that position requires the employee to remain accessible and available to the point where his or her time cannot be used effectively for the employee's own personal purposes.

3. The employee's schedule must specify the hours during which he/she will be required to remain on-call. On call designation will be made on the form attached as Appendix 1.

**SECTION D:            HOLIDAY PAY**

An employee who is required to work on a legal holiday falling within his or her regularly scheduled tour of duty, shall be paid at the rate of twice his or her regular basic rate of pay for not more than eight (8) hours of such work.

**SECTION E:            NIGHT DIFFERENTIAL**

An employee shall receive night differential pay at a rate of ten percent (10%) in excess of their basic day rate of compensation when they perform night work on a regularly scheduled tour of duty falling between 6:00 p.m. and 6:00 a.m. Employees shall receive night differential in lieu of shift differential.

**SECTION F:            PAY FOR SUNDAY WORK**

A full-time employee assigned to a regularly scheduled tour of duty, any part of which includes hours that fall between midnight Saturday and midnight Sunday, is entitled to Sunday premium pay for each hour of work actually performed which is not overtime work and which is not in excess of eight (8) hours for each tour of duty which begins or ends on Sunday. Sunday

premium pay is computed as an additional twenty-five percent (25%) of the employee's basic rate of compensation.

**SECTION G: ADDITIONAL INCOME ALLOWANCE FOR CHILD AND FAMILY SERVICES**

1. The Additional Income Allowance (AIA) program within the Child and Family Services Agency (CFSA) which was established pursuant to the "Personnel Recruitment and Retention Incentives for Child and Family Services Agency Compensation System Changes Emergency Approval Resolution of 2001", Council Resolution 14-53 (March 23, 2001) and as contained in Chapter 11, Section 1154 of the District Personnel Manual, "Recruitment and Retention Incentives – Child and Family Services Agency," shall remain in full force and effect during the term of this Agreement.

2. The Administration of the AIA within CFSA shall be governed by the implementing regulations established in Child and Family Services Agency, Human Resources Administration Issuance System, HRA Instruction No. IV.11-3.

3. **OTHER SUBORDINATE AGENCIES WITH SIGNIFICANT RECRUITMENT AND RETENTION PROBLEMS**

Subordinate agencies covered by this Agreement may provide additional income allowances for positions that have significant recruitment and retention problems consistent with Chapter 11, Part B, Section 1143 of the District Personnel Manual.

**ARTICLE 10: MILEAGE ALLOWANCE**

**SECTION A:**

The parties agree that the mileage allowance established for the employees of the Federal Government who are authorized to use their personal vehicles in the performance of their official duties shall be the rate for Compensation Units 1 and 2 employees, who are also authorized in advance, by Management to use their personal vehicles in the performance of their official duties.

**SECTION B:**

To receive such allowance, authorization by Management must be issued prior to the use of the employee's vehicle in the performance of duty. Employees shall use the appropriate District Form to document mileage and request reimbursement of the allowance.

**SECTION C:**

1. Employees required to use their personal vehicle for official business if a government vehicle is not available, who are reimbursed by the District on a mileage basis for

such use, are within the scope of the District of Columbia Non-Liability Act (D.C. Official Code §§2-411 through 2-416 (2001 Edition)). The Non-Liability Act generally provides that a District Employee is not subject to personal liability in a civil suit for property damage or for personal injury arising out of a motor vehicle accident during the discharge of the employee's official duties, so long as the employee was acting within the scope of his or her employment.

2. Claims by employees for personal property damage or loss incident to the use of their personal vehicle for official business if a government vehicle is not available may be made under the Military Personnel and Civilian Employees Claim Act of 1964 (31 U.S.C. §3701 *et seq.*).

#### **SECTION D:**

No employee within Compensation 1 and 2 shall be required to use his/her personal vehicle unless the position vacancy announcement, position description or other pre-hire documentation informs the employee that the use of his/her personal vehicle is a requirement of the job.

#### **SECTION E:**

Employees required as a condition of employment to use their personal vehicle in the performance of their official duties may be provided a parking space or shall be reimbursed for non-commuter parking expenses, which are incurred in the performance of their official duties.

### **ARTICLE 11: ANNUAL LEAVE/COMPENSATORY TIME BUY-OUT**

#### **SECTION A:**

An employee who is separated or is otherwise entitled to a lump-sum payment under personnel regulations for the District of Columbia Government shall receive such payment for each hour of unused annual leave or compensatory time in the employee's official leave record.

#### **SECTION B:**

The lump-sum payment shall be computed on the basis of the employee's rate at the time of separation in accordance with such personnel regulations.

### **ARTICLE 12: BACK PAY**

Arbitration awards or settlement agreements in cases involving an individual employee shall be paid within sixty (60) days of receipt from the employee of relevant documentation, including documentation of interim earnings and other potential offsets. The responsible Agency shall submit the SF-52 and all other required documentation to the Department of Human Resources within thirty (30) days upon receipt from the employee of relevant documentation.

## **ARTICLE 13: DUTY STATION COVERAGE**

The Fire and Emergency Medical Services employees and the correctional officers at the Department of Corrections and the Department of Youth Rehabilitative Services who are covered under Section 7(k) of the Fair Labor Standards Act shall be compensated a minimum of one hour pay if required to remain at his/her duty station beyond the normal tour of duty.

## **ARTICLE 14: GRIEVANCES**

### **SECTION A:**

This Compensation Agreement shall be incorporated by reference into local working conditions agreements in order to utilize the grievance/arbitration procedure in those Agreements to consider alleged violations of this Agreement.

### **SECTION B:**

Grievances concerning compensation shall be filed with the appropriate agency and the Office of Labor Relations and Collective Bargaining under the applicable working conditions agreement.

## **ARTICLE 15: LOCAL ENVIRONMENT PAY**

### **SECTION A:**

Each department or agency shall eliminate or reduce to the lowest level possible all hazards, physical hardships, and working conditions of an unusual nature. When such action does not overcome the hazard, physical hardship, or unusual nature of the working condition, additional pay is warranted. Even though additional pay for exposure to a hazard, physical hardship, or unusual working condition is authorized, there is a responsibility on the part of a department or agency to initiate continuing positive action to eliminate danger and risk which contribute to or cause the hazard, physical hardship, or unusual working condition. The existence of pay for exposure to hazardous working conditions or hardships in a local environment is not intended to condone work practices that circumvent safety laws, rules and regulations.

### **SECTION B:**

Local environment pay is paid for exposure to (1) a hazard of an unusual nature which could result in significant injury, illness, or death, such as on a high structure when the hazard is not practically eliminated by protective facilities or an open structure when adverse conditions exist, e.g., darkness, lightning, steady rain, snow, sleet, ice, or high wind velocity; (2) a physical hardship of an unusual nature under circumstances which cause significant physical discomfort in the form of nausea, or skin, eye, ear or nose irritation, or conditions which cause abnormal soil of body and clothing, etc., and where such distress or discomfort is not practically eliminated.

**SECTION C:**

Wage Grade (WG) employees as listed in Chapter 11B, Appendix C of the DPM and any other employee including District Service (DS) employees as determined pursuant to Section 4 of this Article and Chapter 11B, Subpart 10.6 of the DPM are eligible for environmental differentials.

**SECTION D:**

The determination as to whether additional pay is warranted for workplace exposure to environmental hazards, hardships or unusual working conditions may be initiated by an agency or labor organization in accordance with the provisions of Chapter 11B, Subpart 10.6 of the DPM.

**SECTION E:**

Employees eligible for local environment pay under the terms of this Agreement shall be compensated as follows:

1. **Severe Exposure.** Employees subject to “Severe” exposure shall receive local environment pay equal to twenty seven percent (27%) of *the rate for RW 10, step 2 on the Compensation Unit 2 pay schedule*. The following categories of work are currently paid the rate for “severe” exposure:

- High Work

2. **Moderate Exposure.** Employees subject to “Moderate” exposure shall receive local environment pay equal to ten percent (10%) of *the rate for RW 10, step 2 on the Compensation Unit 2 pay schedule*. The following categories of work are currently paid the rate for “moderate” exposure:

- Explosives and Incendiary Materials – High Degree Hazard
- Poison (Toxic Chemicals) – High Degree Hazard
- Micro Organisms – High Degree Hazard

3. **Low Exposure.** Employees subject to “Low” exposure shall receive local environment pay equal to five percent (5%) of *the rate for RW 10, step 2 on the Compensation Unit 2 pay schedule*. The following categories of work are currently paid the rate for “low” exposure:

- Dirty Work
- Cold Work
- Hot Work
- Welding Preheated metals



- Explosives and Incendiary Materials
  - Low Degree Hazard
- Poison (Toxic Chemicals)
  - Low Degree Hazard
- Micro Organisms
  - Low Degree Hazard

**SECTION F:**

These changes to local environment pay shall not take effect until the payroll modules of PeopleSoft are implemented by the District of Columbia.

**ARTICLE 16: NEWLY CERTIFIED BARGAINING UNITS**

For units placed into a new compensation unit, working conditions or non-compensatory matters shall be negotiated simultaneous with negotiations concerning compensation. Where the agreement is for a newly certified collective bargaining unit assigned to an existing compensation unit, the parties shall proceed promptly to negotiate simultaneously any working conditions, other non-compensatory matters, and coverage of the compensation agreement. There should not be read into the new language any intent that an existing compensation agreement shall become negotiable when there is a newly certified collective bargaining unit. Rather, the intent is to require prompt negotiations of non-compensatory matters as well as application of compensation (e.g., when pay scale shall apply to the newly certified unit).

**ARTICLE 17: TERM AND TEMPORARY EMPLOYEES**

The District of Columbia recognizes that many temporary and term employees have had their terms extended to perform permanent services. To address the interests of current term and temporary employees whose appointments have been so extended over time and who perform permanent services, the District of Columbia and the Union representing the employees in Compensation Units 1 and 2 agree to the following:

**SECTION A:**

Joint labor-management committees established in each agency/program in the Compensation Units 1 and 2 collective bargaining agreement shall continue and will identify temporary and term employees whose current term and or temporary appointments extend to September 30, 2021, and who perform permanent services in District agency programs.

**SECTION B:**

Each Agency and Local Union shall review all term appointments within the respective agencies to determine whether such appointments are made and maintained consistent with applicable

law. The Union shall identify individual appointments it believes to be contrary to applicable law and notify the Agency. The Agency shall provide the Union reason(s) for the term or temporary nature of the appointment(s), where said appointments appear to be contrary to law. If an employee has been inappropriately appointed to or maintained in a temporary or term appointment, the Agency and the Union shall meet to resolve the matter.

**SECTION C:**

The agency shall convert bargaining unit temporary and term employees identified by the joint labor-management committees, who perform permanent services, who are in a pay status as of September 30, 2017, and are paid from appropriated funding to the career service prior to the end of the FY 2018 – FY 2021 Compensation Agreement.

**SECTION D:**

Prior to the end of the FY 2018 – FY 2021 Compensation Agreement, to the extent not inconsistent with District or Federal law and regulation, the District shall make reasonable efforts to convert to the career service temporary and term bargaining unit employees identified by the joint labor-management committees who perform permanent services, are in a pay status as of September 30, 2017, are full-time permanent positions, and are paid through intra-district funding or federal grant funding.

**SECTION E:**

Employees in term or temporary appointments shall be converted to permanent appointments, consistent with the D.C. Official Code.

**SECTION F:**

District agencies retain the authority to make term and temporary appointments as appropriate for seasonal and temporary work needs.

**SECTION G:**

A Joint-Labor Management Committee shall consist of one (1) representative from each national union comprising Compensation Units 1 and 2. The District shall appoint an equal number of representatives. The Committee will facilitate the implementation of this Article should difficulties arise in the Joint-Labor Management Committees set forth in Section A.

**SECTION H:**

District agencies will first post vacant career service positions internal to the Agency for bargaining unit term and temporary employees to apply and compete before posting the positions externally. There shall be no direct appointments.

## **ARTICLE 18: ADMINISTRATIVE CLOSING**

### **SECTION A:**

1. Employees designated as “Essential Employees” are those who work in critical District government operations that cannot be suspended or interrupted, even in the event of declared emergencies. “Essential Employees” must report to work as scheduled even when the government is administratively closed, during emergencies or other government closing. Once an employee has been notified by his/her employing agency that his/her position is designated as “Essential” no further notice is required as long as the employee continues to occupy the position designated “Essential”.

2. Employees designated “Emergency Employees” are those who support certain critical government operations and functions necessary for the continuity of operations, including during declared emergencies. “Emergency Employees” may be required to work when a situation or condition occurs and result in early dismissal for other employees, government closing or during other emergencies. Once an employee has been notified by his/her employing agency that his/her position is designated as “Emergency”, the designation will remain in effect until the designation is terminated in writing.

3. As applicable, employees required to work when all other District Government employees are released for administrative closings, shall be compensated in accordance with the minimum standards established by the Fair Labor Standards Act, (FLSA), 29 U.S.C. § 2011, et seq.

4. As applicable, employees required to work when all other District Government employee are released as a result of an administrative closings shall be compensated, in addition to their regular pay, one hour for each hour worked during the administrative closing.

### **SECTION B:**

The determination as to whether the employee receives overtime or compensatory time will be at the time employee’s election which shall be made before the work is performed. When elected, employees required to work when all other District Government employees are released for administrative closing shall earn compensatory time on an hour for hour basis.

## **ARTICLE 19: SAVINGS CLAUSE**

### **SECTION A:**

Should any provisions of this Agreement be rendered or declared invalid by reason of any existing or subsequently enacted law or by decree of a court or administrative agency of competent jurisdiction, such invalidation shall not affect any other part or provision hereof. Where appropriate, the parties shall meet within 120 days to negotiate any substitute provision(s).

**SECTION B:**

The terms of this contract supersede any subsequently enacted D.C. laws, District Personnel Manual (DPM) regulations, or departmental rules concerning compensation covered herein.

**ARTICLE 20: DURATION**

This Agreement shall remain in full force and effect through September 30, 2021. On this 25<sup>th</sup> day of February 2018, and as witness the parties hereto have set their signature.

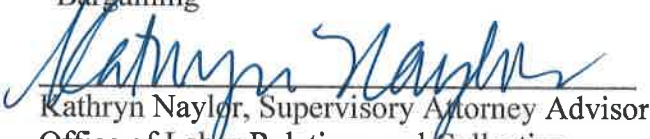
**Compensation Units One and Two Collective Bargaining Agreement**

On this 26<sup>th</sup> day of February, 2018, as witness the parties hereto have set their signature.

**FOR THE DISTRICT OF COLUMBIA  
GOVERNMENT**



Repunzelle Bullock, Interim Director  
Office of Labor Relations and Collective  
Bargaining



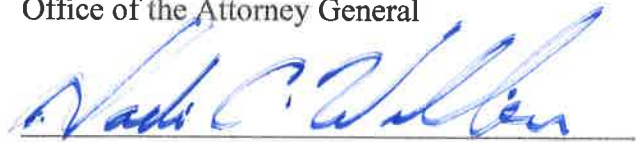
Kathryn Naylor, Supervisory Attorney Advisor  
Office of Labor Relations and Collective



Eugene A. Adams, Director  
Office of Administrative Hearings  
Office



Karl Racine, Attorney General  
Office of the Attorney General



Nadine Wilburn, Chief Counsel/Senior Advisor  
Office of the Attorney General



Tanya Royster, MD, Director  
Department of Behavioral Health




Brendolyn McCarty-Jones, Labor Liaison  
Department of Behavioral Health

**FOR THE UNIONS**



Andrew Washington, Executive Director  
AFSCME, District Council 20




Eric Bunn, Sr. National Vice President  
AFGE, District 14



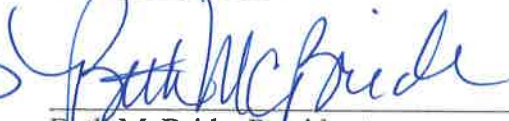
Lee Blackmon, National Representative  
NAGE, District of Columbia Regional



Steve Anderson, President  
AFGE, Local 1403



Wayne L. Enoch, President  
AFSCME, Local 2401



Beth McBride, President  
AFGE, Local 383



Carroll Ward, President  
AFGE, Local 2978




Angie M. Gates, Director  
D.C. Office of Cable Television, Film, Music and  
Entertainment

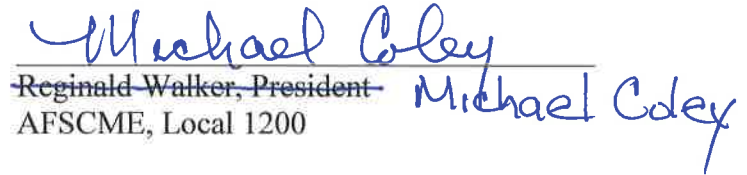




Barry Carey, President  
AFSCME, Local 2091

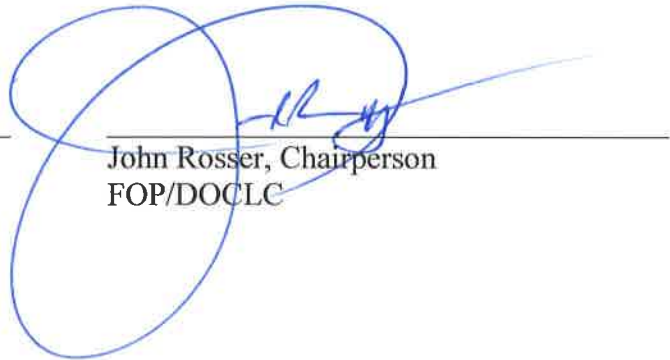
Dr. Steven Johnson, Labor Liaison  
D.C. Office of Cable Television, Film,  
Music and Entertainment

  
Wanda Shelton Martin, Area Director  
1199 NUHHCE

Roger A. Mitchell, Jr. MD, Chief Medical  
Examiner  
Office of the Chief Medical Examiner

  
~~Reginald Walker, President~~  
AFSCME, Local 1200  
Beverly Fields, Labor Liaison  
Office of the Chief Medical Examiner  
Miranda Gillis, President  
AFGE, Local 2725

Barney Krucoff, Interim Chief Technology  
Officer  
Office of the Chief Technology Officer



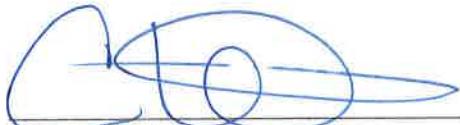
John Rosser, Chairperson  
FOP/DOCLC

Pamela Brown, Esq., General Counsel  
Office of the Chief Technology Officer

Keith Washington, President  
AFSCME, Local 2092

  
Brenda Donald, Director  
Child and Family Services Agency  
Lisa Blackwell, Executive President  
AFGE, Local 1000





Nina McIntosh-Jones, Labor Liaison  
Child and Family Services Agency

Christal Williams

Melinda M. Bolling, Director  
Department of Consumer and  
Regulatory Affairs



Aretha Lyles, President  
AFGE, Local 3721



Gina Walton, President  
AFGE, Local 1975

Don Tatum, Labor Liaison  
Department of Consumer and  
Regulatory Affairs

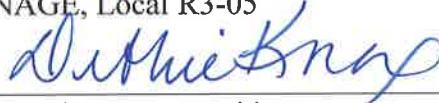
Lisa Wallace, Vice President  
1199 SEIU/UHWE



George A. Schutter, Chief Procurement Officer  
Office of Contracting and Procurement

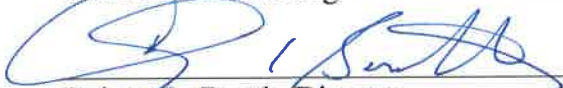


Harvey Cannon, President  
NAGE, Local R3-05

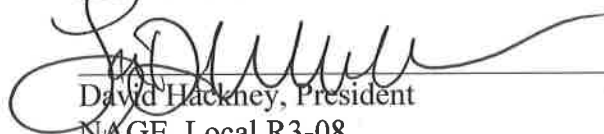


Debbie Knox, President  
NAGE, Local R3-07

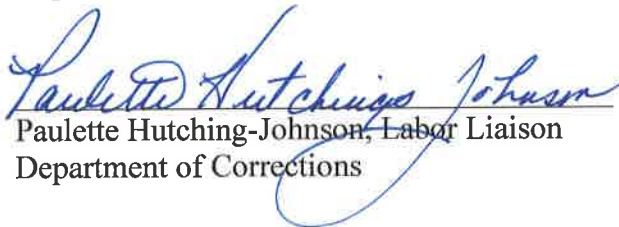
Gina Toppin, Labor Liaison  
Office of Contracting and Procurement



Quincy L. Booth, Director  
Department of Corrections



David Hackney, President  
NAGE, Local R3-08



Paulette Hutchings-Johnson, Labor Liaison  
Department of Corrections



LaToya McDowney, President  
NAGE, Local R3-09

Andrew Reese, Director  
Department on Disability Services



Barbara Milton, President  
AFGE, Local 631

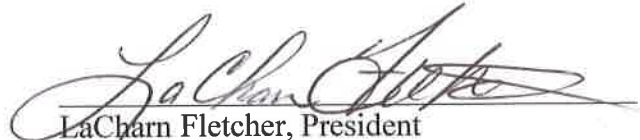


Jessica Gray, Labor Liaison  
Department on Disability Services



Barbara Jones, President  
AFGE, Local 2741

Odie Donald II, Director  
D.C. Department of Employment  
Services



LaCharn Fletcher, President  
FOP/DC Protective Services-PDLC


Van Freeman, Deputy Chief of Staff  
D.C. Department of Employment  
Services

Thomas Ratliff, President  
Teamsters, Local 639


Tommy Wells, Director  
Department of Energy and the  
Environment

Michael Flood, President  
AFSCME, Local 2921

Talisha Pitt, Labor Liaison  
Department of Energy and the  
Environment



Ritchie Brooks, President Rec Secy  
Teamsters, Local 730



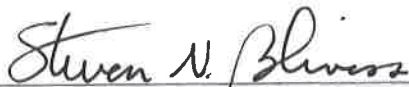
Richard L. Johnson



Gregory Dean, Chief  
Fire and Emergency Medical Services  
Department



Felicia Dantzler, President  
AFSCME, Local 2743



Steven N. Blivess, Esq., Labor Liaison  
Fire and Emergency Medical Services  
Department

Corey Upchurch, President  
AFSCME, Local 1959



*Ernest Chrappah*

Ernest Chrappah, Chairman  
D.C. Department of For-Hire Vehicles

*Debra Walker*

Debra Walker, President  
AFSCME, Local 709

*Tonya Ricks*

Tonya Ricks, Labor Liaison  
D.C. Department of For-Hire Vehicles

*Andre Phillips*  
~~Andre Phillips~~, Chairperson *ANDRE Phillips*  
FOP/DYRSLC

Janifer Smith, PhD, Director  
Department of Forensic Sciences

*Robert Hollingsworth*  
Robert Hollingsworth, President  
AFSCME, Local 2776

Rasheed Raj, General Counsel  
Department of Forensic Sciences

*Antoinette White-Richardson*  
Antoinette White-Richardson, President  
AFSCME, Local 1808

Greer Johnson Gillis, Director  
Department of General Services

*Darrin Roach*  
Darrin Roach, President  
AFSCME, Local 877

*Brittney A. Wright*

Brittney A. Wright, Labor Liaison  
Department of General Services

*LaVerne Gooding-Jones*  
LaVerne Gooding-Jones, President  
AFSCME, Local 2087

*LaQuandra S. Nesbitt*  
LaQuandra S. Nesbitt, MD, MPH, Director  
Department of Health


Larry Doggett, Business Manager  
Public Service Employees, Local 572

*Kathleen C. Ognibene*  
Kathleen Ognibene, Labor Liaison  
Department of Health

Perlsha Gales, President  
Alliance of Independent Workers Union

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Christopher Rodriguez, Director  
Homeland Security and Emergency  
Management Agency

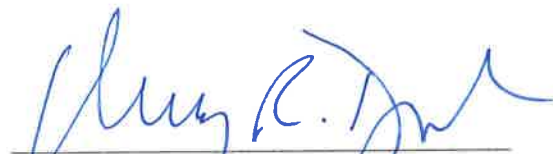


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George Barksdale, President  
AFGE, Local 3444

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Anthony Crispino, Labor Liaison  
Homeland Security and Emergency  
Management Agency



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Pelly Donaldson, Director  
Department of Housing and  
Community Development

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Drew Hubbard, Labor Liaison  
Department of Housing and  
Community Development



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Monica Palacio, Director  
D.C. Office of Human Rights



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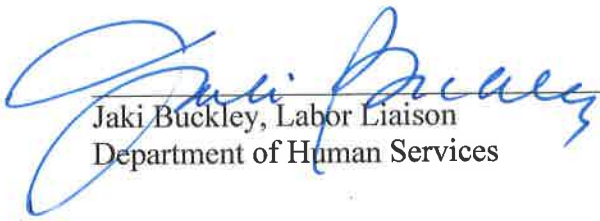
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Ayanna Lee, Labor Liaison  
D.C. Office of Human Rights



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Laura Zeilinger, Director  
Department of Human Services

  
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Jaki Buckley, Labor Liaison  
Department of Human Services

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Stephen C. Taylor, Commissioner  
Department of Insurance, Securities  
And Banking

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Katrice Purdie, Labor Liaison  
Department of Insurance, Securities  
And Banking

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Lucinda Babers, Director  
Department of Motor Vehicles

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Odessa Nance, Labor Liaison  
Department of Motor Vehicles

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Peter Newsham, Chief  
D.C. Metropolitan Police Department

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Mark Viehmeyer, Labor Liaison  
D.C. Metropolitan Police Department

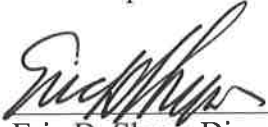
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Keith A. Anderson, Director  
D.C. Department of Parks and Recreation

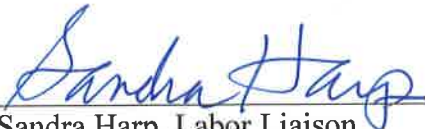
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Kwelli Sneed, MBA, CPM, Labor Liaison  
D. C. Department of Parks and Recreation



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Eric D. Shaw, Director  
D.C. Office of Planning



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Sandra Harp, Labor Liaison  
D.C. Office of Planning

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Antwan Wilson, Chancellor  
D.C. Public Schools

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Kaitlyn Girard, Director  
Labor Management and Employee Relations  
D.C. Public Schools



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For Christopher Shorter, Director  
Department of Public Works



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Gail Heath, Labor Liaison  
Department of Public Works



Jed Ross, Chief Risk Officer  
Office of Risk Management



~~Eric Glover, Esq.~~, Labor Liaison  
Office of Risk Management

MARCO  
CARLOS



Hanseul Kang, Superintendent  
Office of the State Superintendent  
Of Education



Quiyana Hall, Labor Liaison  
Office of the State Superintendent  
Of Education


Jeff Marootian, Director  
District Department of Transportation

Nana Bailey, Labor Liaison  
District Department of Transportation

Karima Holmes, Director  
Office of Unified Communications

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Yvonne McManus, Labor Liaison  
Office of Unified Communications



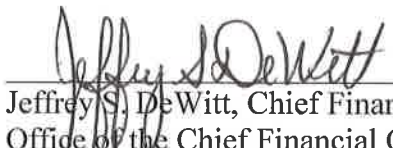
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Clinton Lacey, Director  
Department of Youth Rehabilitation Services



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Trey Stanback, Labor Liaison  
Department of Youth Rehabilitation Services



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Jeffrey S. DeWitt, Chief Financial Officer  
Office of the Chief Financial Officer



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LaSharn Moreland, ~~Labor Liaison~~ *EXECUTIVE DIRECTOR, HUMAN RESOURCES*  
Office of the Chief Financial Officer



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Richard Reyes-Gavilan, Executive Director  
D.C. Public Libraries



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Barbara Kirven, Labor Liaison  
D.C. Public Libraries

---

Veronica Ahern, Executive Director  
D.C. Public Service Commission

---

Richard Beverly, General Counsel  
D.C. Public Service Commission

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Ronald Mason, Jr., J.D., President  
University of the District of Columbia

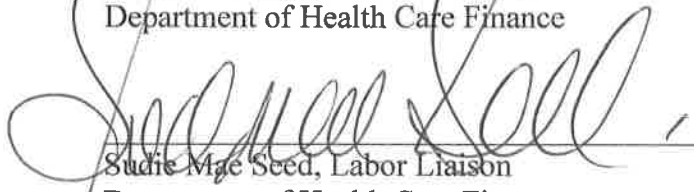
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Patricia Cornwell Johnson, Vice President  
Human Resources  
University of the District of Columbia



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Wayne Turnage, M.P.A., Director  
Department of Health Care Finance



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Stodie Mae Seed, Labor Liaison  
Department of Health Care Finance

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**APPROVAL**

This collective bargaining agreement between the District of Columbia and Compensation Units 1 and 2, dated Jan 23, 2018, has been reviewed in accordance with Section 1-617.15 of the District of Columbia Official Code and is hereby approved on this 24<sup>th</sup> day of February, 2018.



Muriel Bowser  
Mayor



# APPENDIX 1

Management's Proposal

7/26/10

**INSERT DATE**

Firstname Lastname

Position/Title

Department/Division

**RE: On-Call Notification**

Dear Mr./Ms. Lastname:

You are hereby notified that you shall be placed in an "on-call" status effective **On-Call Dates** between the hours of **Start AM/PM** and **End AM/PM**. During the aforementioned hours, you are required to be available to report for work within **a reasonable time (not to exceed two hours)**. You are expected to be available by phone for the duration of the "on-call" period. You are expected to answer when called or return a call from INSERT AGENCY management within a reasonable amount of time (not to exceed **30 minutes**).

Sincerely,

**SUPERVISOR/MANAGER NAME**

**SUPERVISOR POSITION/TITLE**



**COUNCIL OF THE DISTRICT OF COLUMBIA**  
THE JOHN A. WILSON BUILDING  
1350 PENNSYLVANIA AVENUE, N.W.  
WASHINGTON, D.C. 20004

February 23, 2018

The Honorable Muriel E. Bowser  
Mayor of the District of Columbia  
1350 Pennsylvania Avenue, N.W., 3rd Floor  
Washington, D.C. 20004

Dear Mayor Bowser:

This is to inform you of the status of a proposed resolution transmitted to the Council in accordance with D.C. Official Code § 1-617.17(j). The below proposed resolution has been deemed approved by virtue of the Council having taken no action to disapprove it.

<u>Proposed Resolution</u>	<u>Title</u>	<u>Date of Approval</u>
PR 22-738	Compensation Collective Bargaining Agreement between the District of Columbia Government and Compensation Units 1 and 2, FY 2018 - FY 2021, Approval Resolution of 2018	February 23, 2018

If you have any questions please contact me at 202-724-8032.

Sincerely,

Phil Mendelson  
Chairman of the Council

cc: Committee on Labor and Workforce Development



**District of Columbia Government Salary Schedule: Comp Unit 1 & 2 (Union)**



Service Code Definition: Professional and Scientific

Fiscal Year: 2018

Effective Date: October 1, 2017

Series:

Union/Nonunion: Union Affected CBU/Service Code(s):

Pay Plan/Schedule: CS

Peoplesoft Schedule: DS0077

X01

% Increase: 3.0%

Resolution Number:

Date of Resolution:

Grade	1	2	3	4	5	6	7	8	9	10	Between Steps
9 \$	52,570	54,249	55,928	57,607	59,286	60,965	62,644	64,323	66,002	67,681	1,679
10 \$	57,670	59,519	61,368	63,217	65,066	66,915	68,764	70,613	72,462	74,311	1,849
11 \$	63,337	65,372	67,407	69,442	71,477	73,512	75,547	77,582	79,617	81,652	2,035
12 \$	78,364	80,797	83,230	85,663	88,096	90,529	92,962	95,395	97,828	100,261	2,433
13 \$	90,288	93,183	96,078	98,973	101,868	104,763	107,658	110,553	113,448	116,343	2,895
14 \$	106,715	110,133	113,551	116,969	120,387	123,805	127,223	130,641	134,059	137,477	3,418

# District of Columbia Government Salary Schedule: Comp Unit 1 & 2 (Union)



Fiscal Year: 2018 Service Code Definition: Technical and Paraprofessional

Effective Date: October 1, 2017 Series:

Union/Nonunion: Union Affected CBU/Service Code(s):

Pay Plan/Schedule: CS  
Peoplesoft Schedule: DS0078  
X02

% Increase: 3.0%

Resolution Number:

Date of Resolution:

Grade	Steps											Between Steps
	1	2	3	4	5	6	7	8	9	10	11	
5 \$	35,445 \$	36,679 \$	37,913 \$	39,147 \$	40,381 \$	41,615 \$	42,849 \$	44,083 \$	45,317 \$	46,551 \$		1,234
6 \$	39,271 \$	40,640 \$	42,009 \$	43,378 \$	44,747 \$	46,116 \$	47,485 \$	48,854 \$	50,223 \$	51,592 \$		1,369
7 \$	43,518 \$	45,030 \$	46,542 \$	48,054 \$	49,566 \$	51,078 \$	52,590 \$	54,102 \$	55,614 \$	57,126 \$		1,512
8 \$	47,792 \$	49,314 \$	50,836 \$	52,358 \$	53,880 \$	55,402 \$	56,924 \$	58,446 \$	59,968 \$	61,490 \$		1,522
9 \$	52,570 \$	54,249 \$	55,928 \$	57,607 \$	59,286 \$	60,965 \$	62,644 \$	64,323 \$	66,002 \$	67,681 \$		1,679
10 \$	57,670 \$	59,519 \$	61,368 \$	63,217 \$	65,066 \$	66,915 \$	68,764 \$	70,613 \$	72,462 \$	74,311 \$		1,849
11 \$	63,337 \$	65,372 \$	67,407 \$	69,442 \$	71,477 \$	73,512 \$	75,547 \$	77,582 \$	79,617 \$	81,652 \$		2,035

# District of Columbia Government Salary Schedule: Comp Unit 1 & 2 (Union)



Fiscal Year: 2018 Service Code Definition: Clerical and Administrative Support

Effective Date: October 1, 2017 Series:

Union/Nonunion: Union Affected CBU/Service Code(s):

Pay Plan/Schedule: CS  
 Peoplesoft Schedule: DS0079  
 X03

% Increase: 3.0%

Resolution Number:

Date of Resolution:

Grade	Steps										Between Steps	
	1	2	3	4	5	6	7	8	9	10		
2 \$	28,676	\$ 29,679	\$ 30,682	\$ 31,685	\$ 32,688	\$ 33,691	\$ 34,694	\$ 35,697	\$ 36,700	\$ 37,703	\$ 37,703	\$ 1,003
3 \$	31,251	\$ 32,335	\$ 33,419	\$ 34,503	\$ 35,587	\$ 36,671	\$ 37,755	\$ 38,839	\$ 39,923	\$ 41,007	\$ 41,007	\$ 1,084
4 \$	32,776	\$ 33,889	\$ 35,002	\$ 36,115	\$ 37,228	\$ 38,341	\$ 39,454	\$ 40,567	\$ 41,680	\$ 42,793	\$ 42,793	\$ 1,113
5 \$	35,445	\$ 36,679	\$ 37,913	\$ 39,147	\$ 40,381	\$ 41,615	\$ 42,849	\$ 44,083	\$ 45,317	\$ 46,551	\$ 46,551	\$ 1,234
6 \$	39,271	\$ 40,640	\$ 42,009	\$ 43,378	\$ 44,747	\$ 46,116	\$ 47,485	\$ 48,854	\$ 50,223	\$ 51,592	\$ 51,592	\$ 1,369
7 \$	43,518	\$ 45,030	\$ 46,542	\$ 48,054	\$ 49,566	\$ 51,078	\$ 52,590	\$ 54,102	\$ 55,614	\$ 57,126	\$ 57,126	\$ 1,512
8 \$	47,792	\$ 49,314	\$ 50,836	\$ 52,358	\$ 53,880	\$ 55,402	\$ 56,924	\$ 58,446	\$ 59,968	\$ 61,490	\$ 61,490	\$ 1,522
9 \$	52,570	\$ 54,249	\$ 55,928	\$ 57,607	\$ 59,286	\$ 60,965	\$ 62,644	\$ 64,323	\$ 66,002	\$ 67,681	\$ 67,681	\$ 1,679

# District of Columbia Government Salary Schedule: Comp Unit 1 & 2



## Service Code Definition: Corrections and Other Occupation Groups

Fiscal Year: 2018

Effective Date: October 1, 2017

Union/Nonunion: Union

Job Series:

- 0006 Correctional Program Specialist
- 0081 Fire Protection Specialist
- 0101 Correctional Treatment Specialist
- 0390 Telecommunications Equipment Operator
- 1802 Cellblock Technician (Cellblock Only)
- 1811 Criminal Investigator
- 2151 Dispatcher (OUC Only)

Pay Plan/Schedule: CS  
 Peoplesoft Schedule: DS0067  
 X04

% Increase: 3.0%

Resolution Number:

Date of Resolution:

Grade	Step										Between Steps
	1	2	3	4	5	6	7	8	9	10	
4 \$	38,024	\$ 39,080	\$ 40,136	\$ 41,192	\$ 42,248	\$ 43,304	\$ 44,360	\$ 45,416	\$ 46,472	\$ 47,528	\$ 1,056
5 \$	43,731	\$ 44,912	\$ 46,093	\$ 47,274	\$ 48,455	\$ 49,636	\$ 50,817	\$ 51,998	\$ 53,179	\$ 54,360	\$ 1,181
6 \$	46,094	\$ 47,413	\$ 48,732	\$ 50,051	\$ 51,370	\$ 52,689	\$ 54,008	\$ 55,327	\$ 56,646	\$ 57,965	\$ 1,319
7 \$	49,751	\$ 51,216	\$ 52,681	\$ 54,146	\$ 55,611	\$ 57,076	\$ 58,541	\$ 60,006	\$ 61,471	\$ 62,936	\$ 1,465
8 \$	51,851	\$ 53,477	\$ 55,103	\$ 56,729	\$ 58,355	\$ 59,981	\$ 61,607	\$ 63,233	\$ 64,859	\$ 66,485	\$ 1,626
9 \$	55,496	\$ 57,289	\$ 59,082	\$ 60,875	\$ 62,668	\$ 64,461	\$ 66,254	\$ 68,047	\$ 69,840	\$ 71,633	\$ 1,793
10 \$	61,116	\$ 63,091	\$ 65,066	\$ 67,041	\$ 69,016	\$ 70,991	\$ 72,966	\$ 74,941	\$ 76,916	\$ 78,891	\$ 1,975
11 \$	65,004	\$ 67,166	\$ 69,328	\$ 71,490	\$ 73,652	\$ 75,814	\$ 77,976	\$ 80,138	\$ 82,300	\$ 84,462	\$ 2,162
12 \$	77,891	\$ 80,488	\$ 83,085	\$ 85,682	\$ 88,279	\$ 90,876	\$ 93,473	\$ 96,070	\$ 98,667	\$ 101,264	\$ 2,597
13 \$	92,619	\$ 95,708	\$ 98,797	\$ 101,886	\$ 104,975	\$ 108,064	\$ 111,153	\$ 114,242	\$ 117,331	\$ 120,420	\$ 3,089
14 \$	109,467	\$ 113,112	\$ 116,757	\$ 120,402	\$ 124,047	\$ 127,692	\$ 131,337	\$ 134,982	\$ 138,627	\$ 142,272	\$ 3,645

# District of Columbia Government Salary Schedule: Comp Unit 1 & 2 (Union)



Fiscal Year: 2018 Service Code Definition: Social Worker & Student Trainee

Effective Date: October 1, 2017

Union/Nonunion: Union Affected CBU/Service Code(s): A22

Pay Plan/Schedule: CS Series: 0185 Social Worker  
 Peoplesoft Schedule: DS0080 0186 Social Worker (Associate)  
 X05

% Increase: 3.0%

Resolution Number:

Date of Resolution:

Grade	Steps										Between Steps
	1	2	3	4	5	6	7	8	9	10	
5 \$	51,851	\$ 53,213	\$ 54,575	\$ 55,937	\$ 57,299	\$ 58,661	\$ 60,023	\$ 61,385	\$ 62,747	\$ 64,109	\$ 1,362
7 \$	56,226	\$ 57,740	\$ 59,254	\$ 60,768	\$ 62,282	\$ 63,796	\$ 65,310	\$ 66,824	\$ 68,338	\$ 69,852	\$ 1,514
9 \$	60,966	\$ 62,649	\$ 64,332	\$ 66,015	\$ 67,698	\$ 69,381	\$ 71,064	\$ 72,747	\$ 74,430	\$ 76,113	\$ 1,683
11 \$	69,439	\$ 71,474	\$ 73,509	\$ 75,544	\$ 77,579	\$ 79,614	\$ 81,649	\$ 83,684	\$ 85,719	\$ 87,754	\$ 2,035
12 \$	78,364	\$ 80,797	\$ 83,230	\$ 85,663	\$ 88,096	\$ 90,529	\$ 92,962	\$ 95,395	\$ 97,828	\$ 100,261	\$ 2,433
13 \$	86,993	\$ 89,691	\$ 92,389	\$ 95,087	\$ 97,785	\$ 100,483	\$ 103,181	\$ 105,879	\$ 108,577	\$ 111,275	\$ 2,698

# District of Columbia Government Salary Schedule: Comp Unit 1 & 2



**Fiscal Year:** 2018  
**Service Code Definition:** Health Care Occupations  
**Effective Date:** October 1, 2017  
**Service Codes:** A15, A39  
**Union/Nonunion:** Union  
**Job Series:** 0603 Physicians Assistant  
 0620 Licensed Practical Nurse  
 0625 Autopsy Assistant Mortuary  
 0638 Recreation Therapist  
 0644 Medical Technologist  
 0645 Medical Technician  
 0647 Diagnostic Radiologic Technician  
 0649 Medical Instrument Technician  
 0681 Dental Assistant  
 0682 Dental Hygienist  
 0688 Sanitarian  
**Pay Plan/Schedule:** CS  
**Peoplesoft Schedule:** DS0069  
 X06  
**% Increase:** 3.0%  
**Resolution Number:**

Grade	Step												Between Steps																																																			
	1	2	3	4	5	6	7	8	9	10	11	12																																																				
5	\$ 40,980	\$ 42,093	\$ 43,206	\$ 44,319	\$ 45,432	\$ 46,545	\$ 47,658	\$ 48,771	\$ 49,884	\$ 50,997	\$ 52,110	\$ 53,223	\$ 54,336	\$ 55,449	\$ 56,562	\$ 57,675	\$ 58,788	\$ 59,901	\$ 61,014	\$ 62,127	\$ 63,240	\$ 64,353	\$ 65,466	\$ 66,579	\$ 67,692	\$ 68,805	\$ 69,918	\$ 71,031	\$ 72,144	\$ 73,257	\$ 74,370	\$ 75,483	\$ 76,596	\$ 77,709	\$ 78,822	\$ 79,935	\$ 81,048	\$ 82,161	\$ 83,274	\$ 84,387	\$ 85,500	\$ 86,613	\$ 87,726	\$ 88,839	\$ 89,952	\$ 91,065	\$ 92,178	\$ 93,291	\$ 94,404	\$ 95,517	\$ 96,630	\$ 97,743	\$ 98,856	\$ 99,969	\$ 101,082	\$ 102,195	\$ 103,308	\$ 104,421	\$ 105,534	\$ 106,647	\$ 107,760	\$ 108,873	\$ 110,000	\$ 111,113



# District of Columbia Government Salary Schedule: Comp Unit 1 & 2 (Union)



Fiscal Year: 2018		Service Code Definition: Maintenance, Trades, & Labor									
Effective Date:	October 1, 2017	L- Leader									
Union/Nonunion:	Union	Affected CBU/Service Code(s): B01 Regular B02 Leader									
Pay Plan/Schedule:	RW										
Peoplesoft Schedule:	WS0029										
	WS0034- Leaders										
	X07 (Leaders previously X08)										
% Increase:	3.0%										
Resolution Number:											
Date of Resolution:											
Grade	1	2	3	4	5	6	7	8	9	10	Between Steps
02	\$ 16.10	\$ 16.66	\$ 17.22	\$ 17.78	\$ 18.34	\$ 18.90	\$ 19.46	\$ 20.02	\$ 20.58	\$ 21.14	\$ 0.56
02L	\$ 17.56	\$ 18.17	\$ 18.78	\$ 19.39	\$ 20.00	\$ 20.61	\$ 21.22	\$ 21.83	\$ 22.44	\$ 23.05	\$ 0.61
03	\$ 17.37	\$ 17.96	\$ 18.55	\$ 19.14	\$ 19.73	\$ 20.32	\$ 20.91	\$ 21.50	\$ 22.09	\$ 22.68	\$ 0.59
03L	\$ 18.98	\$ 19.64	\$ 20.30	\$ 20.96	\$ 21.62	\$ 22.28	\$ 22.94	\$ 23.60	\$ 24.26	\$ 24.92	\$ 0.66
04	\$ 18.60	\$ 19.24	\$ 19.88	\$ 20.52	\$ 21.16	\$ 21.80	\$ 22.44	\$ 23.08	\$ 23.72	\$ 24.36	\$ 0.64
04L	\$ 20.34	\$ 21.05	\$ 21.76	\$ 22.47	\$ 23.18	\$ 23.89	\$ 24.60	\$ 25.31	\$ 26.02	\$ 26.73	\$ 0.71
05	\$ 19.85	\$ 20.53	\$ 21.21	\$ 21.89	\$ 22.57	\$ 23.25	\$ 23.93	\$ 24.61	\$ 25.29	\$ 25.97	\$ 0.68
05L	\$ 21.62	\$ 22.38	\$ 23.14	\$ 23.90	\$ 24.66	\$ 25.42	\$ 26.18	\$ 26.94	\$ 27.70	\$ 28.46	\$ 0.76
06	\$ 21.03	\$ 21.76	\$ 22.49	\$ 23.22	\$ 23.95	\$ 24.68	\$ 25.41	\$ 26.14	\$ 26.87	\$ 27.60	\$ 0.73
06L	\$ 23.09	\$ 23.88	\$ 24.67	\$ 25.46	\$ 26.25	\$ 27.04	\$ 27.83	\$ 28.62	\$ 29.41	\$ 30.20	\$ 0.79
07	\$ 22.42	\$ 23.19	\$ 23.96	\$ 24.73	\$ 25.50	\$ 26.27	\$ 27.04	\$ 27.81	\$ 28.58	\$ 29.35	\$ 0.77
07L	\$ 24.49	\$ 25.34	\$ 26.19	\$ 27.04	\$ 27.89	\$ 28.74	\$ 29.59	\$ 30.44	\$ 31.29	\$ 32.14	\$ 0.85
08	\$ 23.69	\$ 24.50	\$ 25.31	\$ 26.12	\$ 26.93	\$ 27.74	\$ 28.55	\$ 29.36	\$ 30.17	\$ 30.98	\$ 0.81
08L	\$ 25.89	\$ 26.81	\$ 27.73	\$ 28.65	\$ 29.57	\$ 30.49	\$ 31.41	\$ 32.33	\$ 33.25	\$ 34.17	\$ 0.92
09	\$ 24.85	\$ 25.71	\$ 26.57	\$ 27.43	\$ 28.29	\$ 29.15	\$ 30.01	\$ 30.87	\$ 31.73	\$ 32.59	\$ 0.86
09L	\$ 27.26	\$ 28.20	\$ 29.14	\$ 30.08	\$ 31.02	\$ 31.96	\$ 32.90	\$ 33.84	\$ 34.78	\$ 35.72	\$ 0.94
10	\$ 26.11	\$ 27.02	\$ 27.93	\$ 28.84	\$ 29.75	\$ 30.66	\$ 31.57	\$ 32.48	\$ 33.39	\$ 34.30	\$ 0.91
10L	\$ 28.66	\$ 29.65	\$ 30.64	\$ 31.63	\$ 32.62	\$ 33.61	\$ 34.60	\$ 35.59	\$ 36.58	\$ 37.57	\$ 0.99
11	\$ 27.38	\$ 28.34	\$ 29.30	\$ 30.26	\$ 31.22	\$ 32.18	\$ 33.14	\$ 34.10	\$ 35.06	\$ 36.02	\$ 0.96
11L	\$ 30.05	\$ 31.09	\$ 32.13	\$ 33.17	\$ 34.21	\$ 35.25	\$ 36.29	\$ 37.33	\$ 38.37	\$ 39.41	\$ 1.04
12	\$ 28.66	\$ 29.65	\$ 30.64	\$ 31.63	\$ 32.62	\$ 33.61	\$ 34.60	\$ 35.59	\$ 36.58	\$ 37.57	\$ 0.99
12L	\$ 31.40	\$ 32.48	\$ 33.56	\$ 34.64	\$ 35.72	\$ 36.80	\$ 37.88	\$ 38.96	\$ 40.04	\$ 41.12	\$ 1.08
13	\$ 29.86	\$ 30.90	\$ 31.94	\$ 32.98	\$ 34.02	\$ 35.06	\$ 36.10	\$ 37.14	\$ 38.18	\$ 39.22	\$ 1.04
13L	\$ 32.64	\$ 33.82	\$ 35.00	\$ 36.18	\$ 37.36	\$ 38.54	\$ 39.72	\$ 40.90	\$ 42.08	\$ 43.26	\$ 1.18

# District of Columbia Government Salary Schedule: Comp Unit 1 & 2 (Union)



Fiscal Year: 2018 Service Code Definition: Correctional Officers & EMS

Effective Date: October 1, 2017

Union/Nonunion: Union Affected CBU/Service Code(s): A01, A03, A20, A21

Pay Plan/Schedule: CS 0007 Correctional Officer  
 Peoplesoft Schedule: DS0070 0083 Special Police Officer  
 X10 0699 EMT/Paramedic

% Increase: 3.0%

Resolution Number:

Date of Resolution:

Grade	Steps										Between Steps
	1	2	3	4	5	6	7	8	9	10	
5 \$	43,218 \$	44,328 \$	45,438 \$	46,548 \$	47,658 \$	48,768 \$	49,878 \$	50,988 \$	52,098 \$	53,208 \$	1,110
6 \$	46,643 \$	47,880 \$	49,117 \$	50,354 \$	51,591 \$	52,828 \$	54,065 \$	55,302 \$	56,539 \$	57,776 \$	1,237
7 \$	49,695 \$	51,096 \$	52,497 \$	53,898 \$	55,299 \$	56,700 \$	58,101 \$	59,502 \$	60,903 \$	62,304 \$	1,401
8 \$	54,790 \$	56,341 \$	57,892 \$	59,443 \$	60,994 \$	62,545 \$	64,096 \$	65,647 \$	67,198 \$	68,749 \$	1,551
9 \$	60,310 \$	62,022 \$	63,734 \$	65,446 \$	67,158 \$	68,870 \$	70,582 \$	72,294 \$	74,006 \$	75,718 \$	1,712
10 \$	66,179 \$	68,061 \$	69,943 \$	71,825 \$	73,707 \$	75,589 \$	77,471 \$	79,353 \$	81,235 \$	83,117 \$	1,882

# District of Columbia Government Salary Schedule: Comp Unit 1 & 2 (Union)



Fiscal Year: 2019 Service Code Definition: Professional and Scientific

Effective Date: October 14, 2018

Series:

Union/Nonunion: Union Affected CBU/Service Code(s):

Pay Plan/Schedule: CS

Peoplesoft Schedule: DS0077

X01

2.0%

Resolution Number:

Date of Resolution:

Grade	Steps										Between Steps
	1	2	3	4	5	6	7	8	9	10	
9 \$	53,620 \$	55,333 \$	57,046 \$	58,759 \$	60,472 \$	62,185 \$	63,898 \$	65,611 \$	67,324 \$	69,037 \$	1,713
10 \$	58,823 \$	60,709 \$	62,595 \$	64,481 \$	66,367 \$	68,253 \$	70,139 \$	72,025 \$	73,911 \$	75,797 \$	1,886
11 \$	64,603 \$	66,679 \$	68,755 \$	70,831 \$	72,907 \$	74,983 \$	77,059 \$	79,135 \$	81,211 \$	83,287 \$	2,076
12 \$	79,930 \$	82,412 \$	84,894 \$	87,376 \$	89,858 \$	92,340 \$	94,822 \$	97,304 \$	99,786 \$	102,268 \$	2,482
13 \$	92,093 \$	95,046 \$	97,999 \$	100,952 \$	103,905 \$	106,858 \$	109,811 \$	112,764 \$	115,717 \$	118,670 \$	2,953
14 \$	108,847 \$	112,334 \$	115,821 \$	119,308 \$	122,795 \$	126,282 \$	129,769 \$	133,256 \$	136,743 \$	140,230 \$	3,487

# District of Columbia Government Salary Schedule: Comp Unit 1 & 2 (Union)



Fiscal Year: 2019 Service Code Definition: Technical and Paraprofessional

Effective Date: October 14, 2018 Series:

Union/Nonunion: Union Affected CBU/Service Code(s):

Pay Plan/Schedule: CS  
 Peoplesoft Schedule: DS0078  
 X02

% Increase: 2.0%

Resolution Number:

Date of Resolution:

Grade	Steps											Between Steps
	1	2	3	4	5	6	7	8	9	10		
5	\$ 36,153	\$ 37,412	\$ 38,671	\$ 39,930	\$ 41,189	\$ 42,448	\$ 43,707	\$ 44,966	\$ 46,225	\$ 47,484	\$	\$ 1,259
6	\$ 40,058	\$ 41,454	\$ 42,850	\$ 44,246	\$ 45,642	\$ 47,038	\$ 48,434	\$ 49,830	\$ 51,226	\$ 52,622	\$	\$ 1,396
7	\$ 44,389	\$ 45,931	\$ 47,473	\$ 49,015	\$ 50,557	\$ 52,099	\$ 53,641	\$ 55,183	\$ 56,725	\$ 58,267	\$	\$ 1,542
8	\$ 48,746	\$ 50,299	\$ 51,852	\$ 53,405	\$ 54,958	\$ 56,511	\$ 58,064	\$ 59,617	\$ 61,170	\$ 62,723	\$	\$ 1,553
9	\$ 53,620	\$ 55,333	\$ 57,046	\$ 58,759	\$ 60,472	\$ 62,185	\$ 63,898	\$ 65,611	\$ 67,324	\$ 69,037	\$	\$ 1,713
10	\$ 58,823	\$ 60,709	\$ 62,595	\$ 64,481	\$ 66,367	\$ 68,253	\$ 70,139	\$ 72,025	\$ 73,911	\$ 75,797	\$	\$ 1,886
11	\$ 64,603	\$ 66,679	\$ 68,755	\$ 70,831	\$ 72,907	\$ 74,983	\$ 77,059	\$ 79,135	\$ 81,211	\$ 83,287	\$	\$ 2,076

# District of Columbia Government Salary Schedule: Comp Unit 1 & 2 (Union)



Fiscal Year: 2019 Service Code Definition: Clerical and Administrative Support

Effective Date: October 14, 2018 Series:

Union/Nonunion: Union Affected CBU/Service Code(s):

Pay Plan/Schedule: CS  
 Peoplesoft Schedule: DS0079  
 X03

% Increase: 2.0%

Resolution Number:

Date of Resolution:

Grade	Steps										Between Steps	
	1	2	3	4	5	6	7	8	9	10		
2	\$ 29,250	\$ 30,273	\$ 31,296	\$ 32,319	\$ 33,342	\$ 34,365	\$ 35,388	\$ 36,411	\$ 37,434	\$ 38,457	\$	1,023
3	\$ 31,875	\$ 32,981	\$ 34,087	\$ 35,193	\$ 36,299	\$ 37,405	\$ 38,511	\$ 39,617	\$ 40,723	\$ 41,829	\$	1,106
4	\$ 33,429	\$ 34,565	\$ 35,701	\$ 36,837	\$ 37,973	\$ 39,109	\$ 40,245	\$ 41,381	\$ 42,517	\$ 43,653	\$	1,136
5	\$ 36,153	\$ 37,412	\$ 38,671	\$ 39,930	\$ 41,189	\$ 42,448	\$ 43,707	\$ 44,966	\$ 46,225	\$ 47,484	\$	1,259
6	\$ 40,058	\$ 41,454	\$ 42,850	\$ 44,246	\$ 45,642	\$ 47,038	\$ 48,434	\$ 49,830	\$ 51,226	\$ 52,622	\$	1,396
7	\$ 44,389	\$ 45,931	\$ 47,473	\$ 49,015	\$ 50,557	\$ 52,099	\$ 53,641	\$ 55,183	\$ 56,725	\$ 58,267	\$	1,542
8	\$ 48,746	\$ 50,299	\$ 51,852	\$ 53,405	\$ 54,958	\$ 56,511	\$ 58,064	\$ 59,617	\$ 61,170	\$ 62,723	\$	1,553
9	\$ 53,620	\$ 55,333	\$ 57,046	\$ 58,759	\$ 60,472	\$ 62,185	\$ 63,898	\$ 65,611	\$ 67,324	\$ 69,037	\$	1,713

# District of Columbia Government Salary Schedule: Comp Unit 1 & 2



## Service Code Definition: Corrections and Other Occupation Groups

Fiscal Year: 2019

Effective Date: October 14, 2018

Union/Nonunion: Union

Job Series:

0006 Correctional Program Specialist

0081 Fire Protection Specialist

0101 Correctional Treatment Specialist

0390 Telecommunications Equipment Operator

1802 Cellblock Technician (Cellblock Only)

1811 Criminal Investigator

2151 Dispatcher (OUC Only)

Pay Plan/Schedule: CS

Peoplesoft Schedule: DS0067

X04

% Increase: 2.0%

Resolution Number:

Date of Resolution:

Grade	1	2	3	4	Step 5	6	7	8	9	10	Between Steps
4	\$ 38,785	\$ 39,862	\$ 40,939	\$ 42,016	\$ 43,093	\$ 44,170	\$ 45,247	\$ 46,324	\$ 47,401	\$ 48,478	\$ 1,077
5	\$ 44,604	\$ 45,809	\$ 47,014	\$ 48,219	\$ 49,424	\$ 50,629	\$ 51,834	\$ 53,039	\$ 54,244	\$ 55,449	\$ 1,205
6	\$ 47,017	\$ 48,362	\$ 49,707	\$ 51,052	\$ 52,397	\$ 53,742	\$ 55,087	\$ 56,432	\$ 57,777	\$ 59,122	\$ 1,345
7	\$ 50,747	\$ 52,241	\$ 53,735	\$ 55,229	\$ 56,723	\$ 58,217	\$ 59,711	\$ 61,205	\$ 62,699	\$ 64,193	\$ 1,494
8	\$ 52,890	\$ 54,548	\$ 56,206	\$ 57,864	\$ 59,522	\$ 61,180	\$ 62,838	\$ 64,496	\$ 66,154	\$ 67,812	\$ 1,658
9	\$ 56,609	\$ 58,437	\$ 60,265	\$ 62,093	\$ 63,921	\$ 65,749	\$ 67,577	\$ 69,405	\$ 71,233	\$ 73,061	\$ 1,828
10	\$ 62,340	\$ 64,354	\$ 66,368	\$ 68,382	\$ 70,396	\$ 72,410	\$ 74,424	\$ 76,438	\$ 78,452	\$ 80,466	\$ 2,014
11	\$ 66,305	\$ 68,510	\$ 70,715	\$ 72,920	\$ 75,125	\$ 77,330	\$ 79,535	\$ 81,740	\$ 83,945	\$ 86,150	\$ 2,205
12	\$ 79,449	\$ 82,098	\$ 84,747	\$ 87,396	\$ 90,045	\$ 92,694	\$ 95,343	\$ 97,992	\$ 100,641	\$ 103,290	\$ 2,649
13	\$ 94,471	\$ 97,622	\$ 100,773	\$ 103,924	\$ 107,075	\$ 110,226	\$ 113,377	\$ 116,528	\$ 119,679	\$ 122,830	\$ 3,151
14	\$ 111,656	\$ 115,374	\$ 119,092	\$ 122,810	\$ 126,528	\$ 130,246	\$ 133,964	\$ 137,682	\$ 141,400	\$ 145,118	\$ 3,718

# District of Columbia Government Salary Schedule: Comp Unit 1 & 2 (Union)



Fiscal Year: 2019 Service Code Definition: Social Worker & Student Trainee

Effective Date: October 14, 2018

Union/Nonunion: Union Affected CBU/Service Code(s): A22

Pay Plan/Schedule: CS Series: 0185 Social Worker  
 Peoplesoft Schedule: DS0080 0186 Social Worker (Associate)  
 X05

% Increase: 2.0%

Resolution Number:

Date of Resolution:

Grade	1	2	3	4	5	6	7	8	9	10	Between Steps
5	\$ 52,889	\$ 54,278	\$ 55,667	\$ 57,056	\$ 58,445	\$ 59,834	\$ 61,223	\$ 62,612	\$ 64,001	\$ 65,390	\$ 1,389
7	\$ 57,348	\$ 58,893	\$ 60,438	\$ 61,983	\$ 63,528	\$ 65,073	\$ 66,618	\$ 68,163	\$ 69,708	\$ 71,253	\$ 1,545
9	\$ 62,184	\$ 63,901	\$ 65,618	\$ 67,335	\$ 69,052	\$ 70,769	\$ 72,486	\$ 74,203	\$ 75,920	\$ 77,637	\$ 1,717
11	\$ 70,827	\$ 72,903	\$ 74,979	\$ 77,055	\$ 79,131	\$ 81,207	\$ 83,283	\$ 85,359	\$ 87,435	\$ 89,511	\$ 2,076
12	\$ 79,930	\$ 82,412	\$ 84,894	\$ 87,376	\$ 89,858	\$ 92,340	\$ 94,822	\$ 97,304	\$ 99,786	\$ 102,268	\$ 2,482
13	\$ 88,733	\$ 91,485	\$ 94,237	\$ 96,989	\$ 99,741	\$ 102,493	\$ 105,245	\$ 107,997	\$ 110,749	\$ 113,501	\$ 2,752

# District of Columbia Government Salary Schedule: Comp Unit 1 & 2



Fiscal Year: 2019 Service Code Definition: Health Care Occupations

Effective Date: October 14, 2018 Service Codes: A15, A39

Union/Nonunion: Union Job Series:

Pay Plan/Schedule: CS 0603 Physicians Assistant  
 Peoplesoft Schedule: DS0069 X06 0620 Licensed Practical Nurse  
 0625 Autopsy Assistant Mortuary  
 0638 Recreation Therapist  
 0644 Medical Technologist  
 0645 Medical Technician  
 0647 Diagnostic Radiologic Technician  
 0649 Medical Instrument Technician  
 0681 Dental Assistant  
 0682 Dental Hygienist  
 0688 Sanitarian

% Increase: 2.0%

Resolution Number:

Date of Resolution:

Grade	Step												Between Steps
	1	2	3	4	5	6	7	8	9	10			
5	\$ 41,797	\$ 42,933	\$ 44,069	\$ 45,205	\$ 46,341	\$ 47,477	\$ 48,613	\$ 49,749	\$ 50,885	\$ 52,021	\$ 1,136		
6	\$ 46,329	\$ 47,587	\$ 48,845	\$ 50,103	\$ 51,361	\$ 52,619	\$ 53,877	\$ 55,135	\$ 56,393	\$ 57,651	\$ 1,258		
7	\$ 49,821	\$ 51,229	\$ 52,637	\$ 54,045	\$ 55,453	\$ 56,861	\$ 58,269	\$ 59,677	\$ 61,085	\$ 62,493	\$ 1,408		
8	\$ 54,957	\$ 56,508	\$ 58,059	\$ 59,610	\$ 61,161	\$ 62,712	\$ 64,263	\$ 65,814	\$ 67,365	\$ 68,916	\$ 1,551		
9	\$ 60,471	\$ 62,187	\$ 63,903	\$ 65,619	\$ 67,335	\$ 69,051	\$ 70,767	\$ 72,483	\$ 74,199	\$ 75,915	\$ 1,716		
10	\$ 66,377	\$ 68,258	\$ 70,139	\$ 72,020	\$ 73,901	\$ 75,782	\$ 77,663	\$ 79,544	\$ 81,425	\$ 83,306	\$ 1,881		
11	\$ 72,915	\$ 74,987	\$ 77,059	\$ 79,131	\$ 81,203	\$ 83,275	\$ 85,347	\$ 87,419	\$ 89,491	\$ 91,563	\$ 2,072		
12	\$ 87,373	\$ 89,856	\$ 92,339	\$ 94,822	\$ 97,305	\$ 99,788	\$ 102,271	\$ 104,754	\$ 107,237	\$ 109,720	\$ 2,483		



# District of Columbia Government Salary Schedule: Comp Unit 1 & 2 (Union)



Fiscal Year: 2019 Service Code Definition: Maintenance, Trades, & Labor

Effective Date: October 14, 2018

L- Leader

Union/Nonunion: Union Affected CBU/Service Code(s): B01 Regular  
B02 Leader

Pay Plan/Schedule: RW  
 Peoplesoft Schedule: WS0029  
 WS0034- Leaders  
 X07 (Leaders previously X08)

% Increase: 2.0%

Resolution Number:

Date of Resolution:

Grade	Step										Between Steps	
	1	2	3	4	5	6	7	8	9	10		
02 \$	16.43	\$ 17.00	\$ 17.57	\$ 18.14	\$ 18.71	\$ 19.28	\$ 19.85	\$ 20.42	\$ 20.99	\$ 21.56	\$ 21.56	\$ 0.57
02L \$	17.92	\$ 18.54	\$ 19.16	\$ 19.78	\$ 20.40	\$ 21.02	\$ 21.64	\$ 22.26	\$ 22.88	\$ 23.50	\$ 23.50	\$ 0.62
03 \$	17.72	\$ 18.32	\$ 18.92	\$ 19.52	\$ 20.12	\$ 20.72	\$ 21.32	\$ 21.92	\$ 22.52	\$ 23.12	\$ 23.12	\$ 0.60
03L \$	19.37	\$ 20.04	\$ 20.71	\$ 21.38	\$ 22.05	\$ 22.72	\$ 23.39	\$ 24.06	\$ 24.73	\$ 25.40	\$ 25.40	\$ 0.67
04 \$	18.98	\$ 19.63	\$ 20.28	\$ 20.93	\$ 21.58	\$ 22.23	\$ 22.88	\$ 23.53	\$ 24.18	\$ 24.83	\$ 24.83	\$ 0.65
04L \$	20.76	\$ 21.48	\$ 22.20	\$ 22.92	\$ 23.64	\$ 24.36	\$ 25.08	\$ 25.80	\$ 26.52	\$ 27.24	\$ 27.24	\$ 0.72
05 \$	20.26	\$ 20.95	\$ 21.64	\$ 22.33	\$ 23.02	\$ 23.71	\$ 24.40	\$ 25.09	\$ 25.78	\$ 26.47	\$ 26.47	\$ 0.69
05L \$	22.04	\$ 22.82	\$ 23.60	\$ 24.38	\$ 25.15	\$ 25.93	\$ 26.71	\$ 27.49	\$ 28.27	\$ 29.05	\$ 29.05	\$ 0.78
06 \$	21.43	\$ 22.18	\$ 22.93	\$ 23.68	\$ 24.43	\$ 25.18	\$ 25.93	\$ 26.68	\$ 27.43	\$ 28.18	\$ 28.18	\$ 0.75
06L \$	23.54	\$ 24.35	\$ 25.16	\$ 25.97	\$ 26.78	\$ 27.59	\$ 28.40	\$ 29.21	\$ 30.02	\$ 30.83	\$ 30.83	\$ 0.81
07 \$	22.85	\$ 23.64	\$ 24.43	\$ 25.22	\$ 26.01	\$ 26.80	\$ 27.59	\$ 28.38	\$ 29.17	\$ 29.96	\$ 29.96	\$ 0.79
07L \$	24.97	\$ 25.84	\$ 26.71	\$ 27.58	\$ 28.45	\$ 29.32	\$ 30.19	\$ 31.06	\$ 31.93	\$ 32.80	\$ 32.80	\$ 0.87
08 \$	24.15	\$ 24.98	\$ 25.81	\$ 26.64	\$ 27.47	\$ 28.30	\$ 29.13	\$ 29.96	\$ 30.79	\$ 31.62	\$ 31.62	\$ 0.83
08L \$	26.40	\$ 27.34	\$ 28.28	\$ 29.22	\$ 30.16	\$ 31.10	\$ 32.04	\$ 32.98	\$ 33.92	\$ 34.86	\$ 34.86	\$ 0.94
09 \$	25.34	\$ 26.22	\$ 27.10	\$ 27.98	\$ 28.86	\$ 29.74	\$ 30.62	\$ 31.50	\$ 32.38	\$ 33.26	\$ 33.26	\$ 0.88
09L \$	27.80	\$ 28.76	\$ 29.72	\$ 30.68	\$ 31.64	\$ 32.60	\$ 33.56	\$ 34.52	\$ 35.48	\$ 36.44	\$ 36.44	\$ 0.96
10 \$	26.63	\$ 27.56	\$ 28.49	\$ 29.42	\$ 30.35	\$ 31.28	\$ 32.21	\$ 33.14	\$ 34.07	\$ 35.00	\$ 35.00	\$ 0.93
10L \$	29.23	\$ 30.24	\$ 31.25	\$ 32.26	\$ 33.27	\$ 34.28	\$ 35.29	\$ 36.30	\$ 37.31	\$ 38.32	\$ 38.32	\$ 1.01
11 \$	27.96	\$ 28.93	\$ 29.90	\$ 30.87	\$ 31.84	\$ 32.81	\$ 33.78	\$ 34.75	\$ 35.72	\$ 36.69	\$ 36.69	\$ 0.97
11L \$	30.65	\$ 31.71	\$ 32.77	\$ 33.83	\$ 34.89	\$ 35.95	\$ 37.01	\$ 38.07	\$ 39.13	\$ 40.19	\$ 40.19	\$ 1.06
12 \$	29.23	\$ 30.24	\$ 31.25	\$ 32.26	\$ 33.27	\$ 34.28	\$ 35.29	\$ 36.30	\$ 37.31	\$ 38.32	\$ 38.32	\$ 1.01
12L \$	32.03	\$ 33.13	\$ 34.23	\$ 35.33	\$ 36.43	\$ 37.53	\$ 38.63	\$ 39.73	\$ 40.83	\$ 41.93	\$ 41.93	\$ 1.10
13 \$	30.46	\$ 31.52	\$ 32.58	\$ 33.64	\$ 34.70	\$ 35.76	\$ 36.82	\$ 37.88	\$ 38.94	\$ 40.00	\$ 40.00	\$ 1.06
13L \$	33.27	\$ 34.48	\$ 35.69	\$ 36.90	\$ 38.11	\$ 39.32	\$ 40.53	\$ 41.74	\$ 42.95	\$ 44.16	\$ 44.16	\$ 1.21

# District of Columbia Government Salary Schedule: Comp Unit 1 & 2 (Union)



Fiscal Year: 2019 Service Code Definition: Correctional Officers & EMS

Effective Date: October 14, 2018

Union/Nonunion: Union Affected CBU/Service Code(s): A01, A03, A20, A21

Pay Plan/Schedule: CS Series: 0007 Correctional Officer  
 Peoplesoft Schedule: DS0070 0083 Special Police Officer  
 X10 0699 EMT/Paramedic

% Increase: 2.0%

Resolution Number:

Date of Resolution:

Grade	1	2	3	4	5	6	7	8	9	10	Between Steps
5	\$ 44,083	\$ 45,215	\$ 46,347	\$ 47,479	\$ 48,611	\$ 49,743	\$ 50,875	\$ 52,007	\$ 53,139	\$ 54,271	\$ 1,132
6	\$ 47,575	\$ 48,837	\$ 50,099	\$ 51,361	\$ 52,623	\$ 53,885	\$ 55,147	\$ 56,409	\$ 57,671	\$ 58,933	\$ 1,262
7	\$ 50,689	\$ 52,118	\$ 53,547	\$ 54,976	\$ 56,405	\$ 57,834	\$ 59,263	\$ 60,692	\$ 62,121	\$ 63,550	\$ 1,429
8	\$ 55,886	\$ 57,468	\$ 59,050	\$ 60,632	\$ 62,214	\$ 63,796	\$ 65,378	\$ 66,960	\$ 68,542	\$ 70,124	\$ 1,582
9	\$ 61,517	\$ 63,263	\$ 65,009	\$ 66,755	\$ 68,501	\$ 70,247	\$ 71,993	\$ 73,739	\$ 75,485	\$ 77,231	\$ 1,746
10	\$ 67,505	\$ 69,424	\$ 71,343	\$ 73,262	\$ 75,181	\$ 77,100	\$ 79,019	\$ 80,938	\$ 82,857	\$ 84,776	\$ 1,919

# District of Columbia Government Salary Schedule: Comp Unit 1 & 2 (Union)



Fiscal Year: 2020 Service Code Definition: Professional and Scientific

Effective Date: October 13, 2019 Series:

Union/Nonunion: Union Affected CBU/Service Code(s):

Pay Plan/Schedule: CS

Peoplesoft Schedule: DS0077

X01

3.0%

Resolution Number:

Date of Resolution:

Grade	1	2	3	4	5	6	7	8	9	10	Between Steps	
9 \$	55,230	56,994	58,758	60,522	62,286	64,050	65,814	67,578	69,342	71,106	\$	1,764
10 \$	60,586	62,529	64,472	66,415	68,358	70,301	72,244	74,187	76,130	78,073	\$	1,943
11 \$	66,542	68,680	70,818	72,956	75,094	77,232	79,370	81,508	83,646	85,784	\$	2,138
12 \$	82,326	84,883	87,440	89,997	92,554	95,111	97,668	100,225	102,782	105,339	\$	2,557
13 \$	94,858	97,899	100,940	103,981	107,022	110,063	113,104	116,145	119,186	122,227	\$	3,041
14 \$	112,111	115,703	119,295	122,887	126,479	130,071	133,663	137,255	140,847	144,439	\$	3,592

# District of Columbia Government Salary Schedule: Comp Unit 1 & 2 (Union)



Fiscal Year: 2020 Service Code Definition: Technical and Paraprofessional

Effective Date: October 13, 2019 Series:

Union/Nonunion: Union Affected CBU/Service Code(s):

Pay Plan/Schedule: CS  
Peoplesoft Schedule: DS0078  
X02

% Increase: 3.0%

Resolution Number:

Date of Resolution:

Grade	1	2	3	4	5	6	7	8	9	10	Between Steps
5	\$ 37,237	\$ 38,534	\$ 39,831	\$ 41,128	\$ 42,425	\$ 43,722	\$ 45,019	\$ 46,316	\$ 47,613	\$ 48,910	\$ 1,297
6	\$ 41,259	\$ 42,697	\$ 44,135	\$ 45,573	\$ 47,011	\$ 48,449	\$ 49,887	\$ 51,325	\$ 52,763	\$ 54,201	\$ 1,438
7	\$ 45,718	\$ 47,307	\$ 48,896	\$ 50,485	\$ 52,074	\$ 53,663	\$ 55,252	\$ 56,841	\$ 58,430	\$ 60,019	\$ 1,589
8	\$ 50,207	\$ 51,807	\$ 53,407	\$ 55,007	\$ 56,607	\$ 58,207	\$ 59,807	\$ 61,407	\$ 63,007	\$ 64,607	\$ 1,600
9	\$ 55,230	\$ 56,994	\$ 58,758	\$ 60,522	\$ 62,286	\$ 64,050	\$ 65,814	\$ 67,578	\$ 69,342	\$ 71,106	\$ 1,764
10	\$ 60,586	\$ 62,529	\$ 64,472	\$ 66,415	\$ 68,358	\$ 70,301	\$ 72,244	\$ 74,187	\$ 76,130	\$ 78,073	\$ 1,943
11	\$ 66,542	\$ 68,680	\$ 70,818	\$ 72,956	\$ 75,094	\$ 77,232	\$ 79,370	\$ 81,508	\$ 83,646	\$ 85,784	\$ 2,138

# District of Columbia Government Salary Schedule: Comp Unit 1 & 2 (Union)



Fiscal Year: 2020 Service Code Definition: Clerical and Administrative Support

Effective Date: October 13, 2019 Series:

Union/Nonunion: Union Affected CBU/Service Code(s):

Pay Plan/Schedule: CS  
 Peoplesoft Schedule: DS0079  
 X03

% Increase: 3.0%

Resolution Number:

Date of Resolution:

Grade	Steps										Between Steps
	1	2	3	4	5	6	7	8	9	10	
2 \$	30,130	\$ 31,183	\$ 32,236	\$ 33,289	\$ 34,342	\$ 35,395	\$ 36,448	\$ 37,501	\$ 38,554	\$ 39,607	\$ 1,053
3 \$	32,832	\$ 33,971	\$ 35,110	\$ 36,249	\$ 37,388	\$ 38,527	\$ 39,666	\$ 40,805	\$ 41,944	\$ 43,083	\$ 1,139
4 \$	34,432	\$ 35,602	\$ 36,772	\$ 37,942	\$ 39,112	\$ 40,282	\$ 41,452	\$ 42,622	\$ 43,792	\$ 44,962	\$ 1,170
5 \$	37,237	\$ 38,534	\$ 39,831	\$ 41,128	\$ 42,425	\$ 43,722	\$ 45,019	\$ 46,316	\$ 47,613	\$ 48,910	\$ 1,297
6 \$	41,259	\$ 42,697	\$ 44,135	\$ 45,573	\$ 47,011	\$ 48,449	\$ 49,887	\$ 51,325	\$ 52,763	\$ 54,201	\$ 1,438
7 \$	45,718	\$ 47,307	\$ 48,896	\$ 50,485	\$ 52,074	\$ 53,663	\$ 55,252	\$ 56,841	\$ 58,430	\$ 60,019	\$ 1,589
8 \$	50,207	\$ 51,807	\$ 53,407	\$ 55,007	\$ 56,607	\$ 58,207	\$ 59,807	\$ 61,407	\$ 63,007	\$ 64,607	\$ 1,600
9 \$	55,230	\$ 56,994	\$ 58,758	\$ 60,522	\$ 62,286	\$ 64,050	\$ 65,814	\$ 67,578	\$ 69,342	\$ 71,106	\$ 1,764

# District of Columbia Government Salary Schedule: Comp Unit 1 & 2



## Service Code Definition: Corrections and Other Occupation Groups

Fiscal Year: 2020

Effective Date: October 13, 2019

Union/Nonunion: Union  
 Pay Plan/Schedule: CS  
 Peoplesoft Schedule: DS0067  
 X04  
 % Increase: 3.0%

Resolution Number:

Date of Resolution:

Grade	Step										Between Steps
	1	2	3	4	5	6	7	8	9	10	
4	\$ 39,946	\$ 41,056	\$ 42,166	\$ 43,276	\$ 44,386	\$ 45,496	\$ 46,606	\$ 47,716	\$ 48,826	\$ 49,936	\$ 51,046
5	\$ 45,943	\$ 47,184	\$ 48,425	\$ 49,666	\$ 50,907	\$ 52,148	\$ 53,389	\$ 54,630	\$ 55,871	\$ 57,112	\$ 58,353
6	\$ 48,429	\$ 49,814	\$ 51,199	\$ 52,584	\$ 53,969	\$ 55,354	\$ 56,739	\$ 58,124	\$ 59,509	\$ 60,894	\$ 62,279
7	\$ 52,269	\$ 53,808	\$ 55,347	\$ 56,886	\$ 58,425	\$ 59,964	\$ 61,503	\$ 63,042	\$ 64,581	\$ 66,120	\$ 67,659
8	\$ 54,476	\$ 56,184	\$ 57,892	\$ 59,600	\$ 61,308	\$ 63,016	\$ 64,724	\$ 66,432	\$ 68,140	\$ 69,848	\$ 71,556
9	\$ 58,307	\$ 60,190	\$ 62,073	\$ 63,956	\$ 65,839	\$ 67,722	\$ 69,605	\$ 71,488	\$ 73,371	\$ 75,254	\$ 77,137
10	\$ 64,208	\$ 66,283	\$ 68,358	\$ 70,433	\$ 72,508	\$ 74,583	\$ 76,658	\$ 78,733	\$ 80,808	\$ 82,883	\$ 84,958
11	\$ 68,295	\$ 70,566	\$ 72,837	\$ 75,108	\$ 77,379	\$ 79,650	\$ 81,921	\$ 84,192	\$ 86,463	\$ 88,734	\$ 91,005
12	\$ 81,834	\$ 84,562	\$ 87,290	\$ 90,018	\$ 92,746	\$ 95,474	\$ 98,202	\$ 100,930	\$ 103,658	\$ 106,386	\$ 109,114
13	\$ 97,307	\$ 100,552	\$ 103,797	\$ 107,042	\$ 110,287	\$ 113,532	\$ 116,777	\$ 120,022	\$ 123,267	\$ 126,512	\$ 129,757
14	\$ 115,004	\$ 118,834	\$ 122,664	\$ 126,494	\$ 130,324	\$ 134,154	\$ 137,984	\$ 141,814	\$ 145,644	\$ 149,474	\$ 153,304

Job Series:  
 0006 Correctional Program Specialist  
 0081 Fire Protection Specialist  
 0101 Correctional Treatment Specialist  
 0390 Telecommunications Equipment Operator  
 1802 Cellblock Technician (Cellblock Only)  
 1811 Criminal Investigator  
 2151 Dispatcher (OUC Only)

# District of Columbia Government Salary Schedule: Comp Unit 1 & 2 (Union)



Fiscal Year: 2020 Service Code Definition: Social Worker & Student Trainee

Effective Date: October 13, 2019

Union/Nonunion: Union Affected CBU/Service Code(s): A22

Pay Plan/Schedule: CS Series: 0185 Social Worker  
 Peoplesoft Schedule: DS0080 0186 Social Worker (Associate)  
 X05

% Increase: 3.0%

Resolution Number:

Date of Resolution:

Grade	Steps										Between Steps
	1	2	3	4	5	6	7	8	9	10	
5 \$	54,478	55,908	57,338	58,768	60,198	61,628	63,058	64,488	65,918	67,348	1,430
7 \$	59,066	60,658	62,250	63,842	65,434	67,026	68,618	70,210	71,802	73,394	1,592
9 \$	64,048	65,817	67,586	69,355	71,124	72,893	74,662	76,431	78,200	79,969	1,769
11 \$	72,953	75,091	77,229	79,367	81,505	83,643	85,781	87,919	90,057	92,195	2,138
12 \$	82,326	84,883	87,440	89,997	92,554	95,111	97,668	100,225	102,782	105,339	2,557
13 \$	91,397	94,231	97,065	99,899	102,733	105,567	108,401	111,235	114,069	116,903	2,834

# District of Columbia Government Salary Schedule: Comp Unit 1 & 2



Fiscal Year: 2020 Service Code Definition: Health Care Occupations

Effective Date: October 13, 2019 Service Codes: A15, A39

Union/Nonunion: Union Job Series:

- 0603 Physicians Assistant
- 0620 Licensed Practical Nurse
- 0625 Autopsy Assistant Mortuary
- 0638 Recreation Therapist
- 0644 Medical Technologist
- 0645 Medical Technician
- 0647 Diagnostic Radiologic Technician
- 0649 Medical Instrument Technician
- 0681 Dental Assistant
- 0682 Dental Hygienist
- 0688 Sanitarian

Pay Plan/Schedule: CS  
 Peoplesoft Schedule: DS0069 X06

% Increase: 3.0%

Resolution Number:

Date of Resolution:

Grade	Step												Between Steps																																																																																																																																																																																																																																																																																																																																																																																		
	1	2	3	4	5	6	7	8	9	10																																																																																																																																																																																																																																																																																																																																																																																					
5	\$ 43,051	\$ 44,221	\$ 45,391	\$ 46,561	\$ 47,731	\$ 48,901	\$ 50,071	\$ 51,241	\$ 52,411	\$ 53,581	\$ 54,751	\$ 55,921	\$ 57,091	\$ 58,261	\$ 59,431	\$ 60,601	\$ 61,771	\$ 62,941	\$ 64,111	\$ 65,281	\$ 66,451	\$ 67,621	\$ 68,791	\$ 69,961	\$ 71,131	\$ 72,301	\$ 73,471	\$ 74,641	\$ 75,811	\$ 76,981	\$ 78,151	\$ 79,321	\$ 80,491	\$ 81,661	\$ 82,831	\$ 84,001	\$ 85,171	\$ 86,341	\$ 87,511	\$ 88,681	\$ 89,851	\$ 91,021	\$ 92,191	\$ 93,361	\$ 94,531	\$ 95,701	\$ 96,871	\$ 98,041	\$ 99,211	\$ 100,381	\$ 101,551	\$ 102,721	\$ 103,891	\$ 105,061	\$ 106,231	\$ 107,401	\$ 108,571	\$ 109,741	\$ 110,911	\$ 112,081	\$ 113,251	\$ 114,421	\$ 115,591	\$ 116,761	\$ 117,931	\$ 119,101	\$ 120,271	\$ 121,441	\$ 122,611	\$ 123,781	\$ 124,951	\$ 126,121	\$ 127,291	\$ 128,461	\$ 129,631	\$ 130,801	\$ 131,971	\$ 133,141	\$ 134,311	\$ 135,481	\$ 136,651	\$ 137,821	\$ 138,991	\$ 140,161	\$ 141,331	\$ 142,501	\$ 143,671	\$ 144,841	\$ 146,011	\$ 147,181	\$ 148,351	\$ 149,521	\$ 150,691	\$ 151,861	\$ 153,031	\$ 154,201	\$ 155,371	\$ 156,541	\$ 157,711	\$ 158,881	\$ 160,051	\$ 161,221	\$ 162,391	\$ 163,561	\$ 164,731	\$ 165,901	\$ 167,071	\$ 168,241	\$ 169,411	\$ 170,581	\$ 171,751	\$ 172,921	\$ 174,091	\$ 175,261	\$ 176,431	\$ 177,601	\$ 178,771	\$ 179,941	\$ 181,111	\$ 182,281	\$ 183,451	\$ 184,621	\$ 185,791	\$ 186,961	\$ 188,131	\$ 189,301	\$ 190,471	\$ 191,641	\$ 192,811	\$ 193,981	\$ 195,151	\$ 196,321	\$ 197,491	\$ 198,661	\$ 199,831	\$ 201,001	\$ 202,171	\$ 203,341	\$ 204,511	\$ 205,681	\$ 206,851	\$ 208,021	\$ 209,191	\$ 210,361	\$ 211,531	\$ 212,701	\$ 213,871	\$ 215,041	\$ 216,211	\$ 217,381	\$ 218,551	\$ 219,721	\$ 220,891	\$ 222,061	\$ 223,231	\$ 224,401	\$ 225,571	\$ 226,741	\$ 227,911	\$ 229,081	\$ 230,251	\$ 231,421	\$ 232,591	\$ 233,761	\$ 234,931	\$ 236,101	\$ 237,271	\$ 238,441	\$ 239,611	\$ 240,781	\$ 241,951	\$ 243,121	\$ 244,291	\$ 245,461	\$ 246,631	\$ 247,801	\$ 248,971	\$ 250,141	\$ 251,311	\$ 252,481	\$ 253,651	\$ 254,821	\$ 255,991	\$ 257,161	\$ 258,331	\$ 259,501	\$ 260,671	\$ 261,841	\$ 263,011	\$ 264,181	\$ 265,351	\$ 266,521	\$ 267,691	\$ 268,861	\$ 270,031	\$ 271,201	\$ 272,371	\$ 273,541	\$ 274,711	\$ 275,881	\$ 277,051	\$ 278,221	\$ 279,391	\$ 280,561	\$ 281,731	\$ 282,901	\$ 284,071	\$ 285,241	\$ 286,411	\$ 287,581	\$ 288,751	\$ 289,921	\$ 291,091	\$ 292,261	\$ 293,431	\$ 294,601	\$ 295,771	\$ 296,941	\$ 298,111	\$ 299,281	\$ 300,451	\$ 301,621	\$ 302,791	\$ 303,961	\$ 305,131	\$ 306,301	\$ 307,471	\$ 308,641	\$ 309,811	\$ 310,981	\$ 312,151	\$ 313,321	\$ 314,491	\$ 315,661	\$ 316,831	\$ 318,001	\$ 319,171	\$ 320,341	\$ 321,511	\$ 322,681	\$ 323,851	\$ 325,021	\$ 326,191	\$ 327,361	\$ 328,531	\$ 329,701	\$ 330,871	\$ 332,041	\$ 333,211	\$ 334,381	\$ 335,551	\$ 336,721	\$ 337,891	\$ 339,061	\$ 340,231	\$ 341,401	\$ 342,571	\$ 343,741	\$ 344,911	\$ 346,081	\$ 347,251	\$ 348,421	\$ 349,591	\$ 350,761	\$ 351,931	\$ 353,101	\$ 354,271	\$ 355,441	\$ 356,611	\$ 357,781	\$ 358,951	\$ 360,121	\$ 361,291	\$ 362,461	\$ 363,631	\$ 364,801	\$ 365,971	\$ 367,141	\$ 368,311	\$ 369,481	\$ 370,651	\$ 371,821	\$ 372,991	\$ 374,161	\$ 375,331	\$ 376,501	\$ 377,671	\$ 378,841	\$ 380,011	\$ 381,181	\$ 382,351	\$ 383,521	\$ 384,691	\$ 385,861	\$ 387,031	\$ 388,201	\$ 389,371	\$ 390,541	\$ 391,711	\$ 392,881	\$ 394,051	\$ 395,221	\$ 396,391	\$ 397,561	\$ 398,731	\$ 399,901	\$ 401,071	\$ 402,241	\$ 403,411	\$ 404,581	\$ 405,751	\$ 406,921	\$ 408,091	\$ 409,261	\$ 410,431	\$ 411,601	\$ 412,771	\$ 413,941	\$ 415,111	\$ 416,281	\$ 417,451	\$ 418,621	\$ 419,791	\$ 420,961	\$ 422,131	\$ 423,301	\$ 424,471	\$ 425,641	\$ 426,811	\$ 427,981	\$ 429,151	\$ 430,321	\$ 431,491	\$ 432,661	\$ 433,831	\$ 435,001	\$ 436,171	\$ 437,341	\$ 438,511	\$ 439,681	\$ 440,851	\$ 442,021	\$ 443,191	\$ 444,361	\$ 445,531	\$ 446,701	\$ 447,871	\$ 449,041	\$ 450,211	\$ 451,381	\$ 452,551	\$ 453,721	\$ 454,891	\$ 456,061	\$ 457,231	\$ 458,401	\$ 459,571	\$ 460,741	\$ 461,911	\$ 463,081	\$ 464,251	\$ 465,421	\$ 466,591	\$ 467,761	\$ 468,931	\$ 470,101	\$ 471,271	\$ 472,441	\$ 473,611	\$ 474,781	\$ 475,951	\$ 477,121	\$ 478,291	\$ 479,461	\$ 480,631	\$ 481,801	\$ 482,971	\$ 484,141	\$ 485,311	\$ 486,481	\$ 487,651	\$ 488,821	\$ 490,000



# District of Columbia Government Salary Schedule: Comp Unit 1 & 2 (Union)



**Fiscal Year:** 2020  
**Effective Date:** October 13, 2019  
**Union/Nonunion:** Union  
**Service Code Definition:** Maintenance, Trades, & Labor  
**Affected CBU/Service Code(s):** L- Leader  
 B01 Regular  
 B02 Leader

**Pay Plan/Schedule:** RW  
**Peoplesoft Schedule:** WS0029  
 WS0034- Leaders  
 X07 (Leaders previously X08)

**% Increase:** 3.0%

**Resolution Number:**

**Date of Resolution:**

Grade	Step										Between Steps	
	1	2	3	4	5	6	7	8	9	10		
02 \$	16.91	17.50	18.09	18.68	19.27	19.86	20.45	21.04	21.63	22.22	\$	0.59
02L \$	18.45	19.09	19.73	20.37	21.01	21.65	22.29	22.93	23.57	24.21	\$	0.64
03 \$	18.28	18.89	19.50	20.11	20.72	21.33	21.94	22.55	23.16	23.77	\$	0.61
03L \$	19.95	20.64	21.33	22.02	22.71	23.40	24.09	24.78	25.47	26.16	\$	0.69
04 \$	19.55	20.22	20.89	21.56	22.23	22.90	23.57	24.24	24.91	25.58	\$	0.67
04L \$	21.39	22.13	22.87	23.61	24.35	25.09	25.83	26.57	27.31	28.05	\$	0.74
05 \$	20.87	21.58	22.29	23.00	23.71	24.42	25.13	25.84	26.55	27.26	\$	0.71
05L \$	22.74	23.53	24.32	25.11	25.90	26.69	27.48	28.27	29.06	29.85	\$	0.79
06 \$	22.08	22.85	23.62	24.39	25.16	25.93	26.70	27.47	28.24	29.01	\$	0.77
06L \$	24.26	25.09	25.92	26.75	27.58	28.41	29.24	30.07	30.90	31.73	\$	0.83
07 \$	23.55	24.36	25.17	25.98	26.79	27.60	28.41	29.22	30.03	30.84	\$	0.81
07L \$	25.74	26.63	27.52	28.41	29.30	30.19	31.08	31.97	32.86	33.75	\$	0.89
08 \$	24.89	25.74	26.59	27.44	28.29	29.14	29.99	30.84	31.69	32.54	\$	0.85
08L \$	27.22	28.18	29.14	30.10	31.06	32.02	32.98	33.94	34.90	35.86	\$	0.96
09 \$	26.09	27.00	27.91	28.82	29.73	30.64	31.55	32.46	33.37	34.28	\$	0.91
09L \$	28.63	29.62	30.61	31.60	32.59	33.58	34.57	35.56	36.55	37.54	\$	0.99
10 \$	27.42	28.38	29.34	30.30	31.26	32.22	33.18	34.14	35.10	36.06	\$	0.96
10L \$	30.11	31.15	32.19	33.23	34.27	35.31	36.35	37.39	38.43	39.47	\$	1.04
11 \$	28.80	29.80	30.80	31.80	32.80	33.80	34.80	35.80	36.80	37.80	\$	1.00
11L \$	31.54	32.64	33.74	34.84	35.94	37.04	38.14	39.24	40.34	41.44	\$	1.10
12 \$	30.11	31.15	32.19	33.23	34.27	35.31	36.35	37.39	38.43	39.47	\$	1.04
12L \$	33.00	34.13	35.26	36.39	37.52	38.65	39.78	40.91	42.04	43.17	\$	1.13
13 \$	31.38	32.47	33.56	34.65	35.74	36.83	37.92	39.01	40.10	41.19	\$	1.09
13L \$	34.26	35.51	36.76	38.01	39.25	40.50	41.75	43.00	44.25	45.50	\$	1.25

# District of Columbia Government Salary Schedule: Comp Unit 1 & 2 (Union)



Fiscal Year: 2020 Service Code Definition: Correctional Officers & EMS

Effective Date: October 13, 2019

Union/Nonunion: Union Affected CBU/Service Code(s): A01, A03, A20, A21

Pay Plan/Schedule: CS Series: 0007 Correctional Officer  
 Peoplesoft Schedule: DS0070 0083 Special Police Officer  
 X10 0699 EMT/Paramedic

% Increase: 3.0%

Resolution Number:

Date of Resolution:

Grade	Steps										Between Steps
	1	2	3	4	5	6	7	8	9	10	
5	\$ 45,405	\$ 46,571	\$ 47,737	\$ 48,903	\$ 50,069	\$ 51,235	\$ 52,401	\$ 53,567	\$ 54,733	\$ 55,899	\$ 1,166
6	\$ 49,002	\$ 50,302	\$ 51,602	\$ 52,902	\$ 54,202	\$ 55,502	\$ 56,802	\$ 58,102	\$ 59,402	\$ 60,702	\$ 1,300
7	\$ 52,209	\$ 53,681	\$ 55,153	\$ 56,625	\$ 58,097	\$ 59,569	\$ 61,041	\$ 62,513	\$ 63,985	\$ 65,457	\$ 1,472
8	\$ 57,564	\$ 59,193	\$ 60,822	\$ 62,451	\$ 64,080	\$ 65,709	\$ 67,338	\$ 68,967	\$ 70,596	\$ 72,225	\$ 1,629
9	\$ 63,364	\$ 65,162	\$ 66,960	\$ 68,758	\$ 70,556	\$ 72,354	\$ 74,152	\$ 75,950	\$ 77,748	\$ 79,546	\$ 1,798
10	\$ 69,532	\$ 71,508	\$ 73,484	\$ 75,460	\$ 77,436	\$ 79,412	\$ 81,388	\$ 83,364	\$ 85,340	\$ 87,316	\$ 1,976

# District of Columbia Government Salary Schedule: Comp Unit 1 & 2 (Union)



Fiscal Year: 2021 Service Code Definition: Professional and Scientific

Effective Date: October 11, 2020 Series:

Union/Nonunion: Union Affected CBU/Service Code(s):

Pay Plan/Schedule: CS  
 Peoplesoft Schedule: DS0077  
 X01  
 % Increase: 3.5%

Resolution Number:

Date of Resolution:

Grade	Steps										Between Steps	
	1	2	3	4	5	6	7	8	9	10		
9 \$	57,162	\$ 58,988	\$ 60,814	\$ 62,640	\$ 64,466	\$ 66,292	\$ 68,118	\$ 69,944	\$ 71,770	\$ 73,596	\$ 75,422	1,826
10 \$	62,707	\$ 64,718	\$ 66,729	\$ 68,740	\$ 70,751	\$ 72,762	\$ 74,773	\$ 76,784	\$ 78,795	\$ 80,806	\$ 82,817	2,011
11 \$	68,870	\$ 71,083	\$ 73,296	\$ 75,509	\$ 77,722	\$ 79,935	\$ 82,148	\$ 84,361	\$ 86,574	\$ 88,787	\$ 91,000	2,213
12 \$	85,209	\$ 87,855	\$ 90,501	\$ 93,147	\$ 95,793	\$ 98,439	\$ 101,085	\$ 103,731	\$ 106,377	\$ 109,023	\$ 111,669	2,646
13 \$	98,176	\$ 101,324	\$ 104,472	\$ 107,620	\$ 110,768	\$ 113,916	\$ 117,064	\$ 120,212	\$ 123,360	\$ 126,508	\$ 129,656	3,148
14 \$	116,034	\$ 119,752	\$ 123,470	\$ 127,188	\$ 130,906	\$ 134,624	\$ 138,342	\$ 142,060	\$ 145,778	\$ 149,496	\$ 153,214	3,718

# District of Columbia Government Salary Schedule: Comp Unit 1 & 2 (Union)



Fiscal Year: 2021 Service Code Definition: Technical and Paraprofessional

Effective Date: October 11, 2020 Series:

Union/Nonunion: Union Affected CBU/Service Code(s):

Pay Plan/Schedule: CS  
 Peoplesoft Schedule: DS0078  
 X02

% Increase: 3.5%

Resolution Number:

Date of Resolution:

Grade	Steps											Between Steps				
	1	2	3	4	5	6	7	8	9	10	11					
5 \$	38,538	\$ 39,881	\$ 41,224	\$ 42,567	\$ 43,910	\$ 45,253	\$ 46,596	\$ 47,939	\$ 49,282	\$ 50,625	\$ 51,968	\$ 53,311	\$ 54,654	\$ 56,000	\$ 57,343	1,343
6 \$	42,704	\$ 44,192	\$ 45,680	\$ 47,168	\$ 48,656	\$ 50,144	\$ 51,632	\$ 53,120	\$ 54,608	\$ 56,096	\$ 57,584	\$ 59,072	\$ 60,560	\$ 62,048	\$ 63,536	1,488
7 \$	47,317	\$ 48,962	\$ 50,607	\$ 52,252	\$ 53,897	\$ 55,542	\$ 57,187	\$ 58,832	\$ 60,477	\$ 62,122	\$ 63,767	\$ 65,412	\$ 67,057	\$ 68,702	\$ 70,347	1,645
8 \$	51,964	\$ 53,620	\$ 55,276	\$ 56,932	\$ 58,588	\$ 60,244	\$ 61,900	\$ 63,556	\$ 65,212	\$ 66,868	\$ 68,524	\$ 70,180	\$ 71,836	\$ 73,492	\$ 75,148	1,656
9 \$	57,162	\$ 58,988	\$ 60,814	\$ 62,640	\$ 64,466	\$ 66,292	\$ 68,118	\$ 69,944	\$ 71,770	\$ 73,596	\$ 75,422	\$ 77,248	\$ 79,074	\$ 80,900	\$ 82,726	1,826
10 \$	62,707	\$ 64,718	\$ 66,729	\$ 68,740	\$ 70,751	\$ 72,762	\$ 74,773	\$ 76,784	\$ 78,795	\$ 80,806	\$ 82,817	\$ 84,828	\$ 86,839	\$ 88,850	\$ 90,861	2,011
11 \$	68,870	\$ 71,083	\$ 73,296	\$ 75,509	\$ 77,722	\$ 79,935	\$ 82,148	\$ 84,361	\$ 86,574	\$ 88,787	\$ 91,000	\$ 93,213	\$ 95,426	\$ 97,639	\$ 99,852	2,213

# District of Columbia Government Salary Schedule: Comp Unit 1 & 2 (Union)



Fiscal Year: 2021 Service Code Definition: Clerical and Administrative Support

Effective Date: October 11, 2020 Series:

Union/Nonunion: Union Affected CBU/Service Code(s):

Pay Plan/Schedule: CS  
 Peoplesoft Schedule: DS0079  
 X03

% Increase: 3.5%

Resolution Number:

Date of Resolution:

Grade	Steps										Between Steps
	1	2	3	4	5	6	7	8	9	10	
2 \$	31,184 \$	32,274 \$	33,364 \$	34,454 \$	35,544 \$	36,634 \$	37,724 \$	38,814 \$	39,904 \$	40,994 \$	1,090
3 \$	33,981 \$	35,160 \$	36,339 \$	37,518 \$	38,697 \$	39,876 \$	41,055 \$	42,234 \$	43,413 \$	44,592 \$	1,179
4 \$	35,637 \$	36,848 \$	38,059 \$	39,270 \$	40,481 \$	41,692 \$	42,903 \$	44,114 \$	45,325 \$	46,536 \$	1,211
5 \$	38,538 \$	39,881 \$	41,224 \$	42,567 \$	43,910 \$	45,253 \$	46,596 \$	47,939 \$	49,282 \$	50,625 \$	1,343
6 \$	42,704 \$	44,192 \$	45,680 \$	47,168 \$	48,656 \$	50,144 \$	51,632 \$	53,120 \$	54,608 \$	56,096 \$	1,488
7 \$	47,317 \$	48,962 \$	50,607 \$	52,252 \$	53,897 \$	55,542 \$	57,187 \$	58,832 \$	60,477 \$	62,122 \$	1,645
8 \$	51,964 \$	53,620 \$	55,276 \$	56,932 \$	58,588 \$	60,244 \$	61,900 \$	63,556 \$	65,212 \$	66,868 \$	1,656
9 \$	57,162 \$	58,988 \$	60,814 \$	62,640 \$	64,466 \$	66,292 \$	68,118 \$	69,944 \$	71,770 \$	73,596 \$	1,826

# District of Columbia Government Salary Schedule: Comp Unit 1 & 2



## Service Code Definition: Corrections and Other Occupation Groups

Fiscal Year: 2021

Effective Date: October 11, 2020

Union/Nonunion: Union

Job Series:

- 0006 Correctional Program Specialist
- 0081 Fire Protection Specialist
- 0101 Correctional Treatment Specialist
- 0390 Telecommunications Equipment Operator
- 1802 Cellblock Technician (Cellblock Only)
- 1811 Criminal Investigator
- 2151 Dispatcher (OUC Only)

Pay Plan/Schedule: CS  
Peoplesoft Schedule: DS0067  
X04

% Increase: 3.5%

Resolution Number:

Date of Resolution:

Grade	1	2	3	4	5	6	7	8	9	10	Between Steps
4	\$ 41,344	\$ 42,493	\$ 43,642	\$ 44,791	\$ 45,940	\$ 47,089	\$ 48,238	\$ 49,387	\$ 50,536	\$ 51,685	\$ 1,149
5	\$ 47,549	\$ 48,834	\$ 50,119	\$ 51,404	\$ 52,689	\$ 53,974	\$ 55,259	\$ 56,544	\$ 57,829	\$ 59,114	\$ 1,285
6	\$ 50,119	\$ 51,554	\$ 52,989	\$ 54,424	\$ 55,858	\$ 57,293	\$ 58,728	\$ 60,163	\$ 61,598	\$ 63,033	\$ 1,435
7	\$ 54,098	\$ 55,691	\$ 57,284	\$ 58,877	\$ 60,470	\$ 62,063	\$ 63,656	\$ 65,249	\$ 66,842	\$ 68,435	\$ 1,593
8	\$ 56,382	\$ 58,150	\$ 59,918	\$ 61,686	\$ 63,454	\$ 65,222	\$ 66,990	\$ 68,758	\$ 70,526	\$ 72,294	\$ 1,768
9	\$ 60,347	\$ 62,296	\$ 64,245	\$ 66,194	\$ 68,143	\$ 70,092	\$ 72,041	\$ 73,990	\$ 75,939	\$ 77,888	\$ 1,949
10	\$ 66,454	\$ 68,602	\$ 70,750	\$ 72,898	\$ 75,046	\$ 77,194	\$ 79,342	\$ 81,490	\$ 83,638	\$ 85,786	\$ 2,148
11	\$ 70,687	\$ 73,037	\$ 75,387	\$ 77,737	\$ 80,087	\$ 82,437	\$ 84,787	\$ 87,137	\$ 89,487	\$ 91,837	\$ 2,350
12	\$ 84,700	\$ 87,523	\$ 90,346	\$ 93,169	\$ 95,992	\$ 98,815	\$ 101,638	\$ 104,461	\$ 107,284	\$ 110,107	\$ 2,823
13	\$ 100,711	\$ 104,070	\$ 107,429	\$ 110,788	\$ 114,147	\$ 117,506	\$ 120,865	\$ 124,224	\$ 127,583	\$ 130,942	\$ 3,359
14	\$ 119,029	\$ 122,993	\$ 126,957	\$ 130,921	\$ 134,885	\$ 138,849	\$ 142,813	\$ 146,777	\$ 150,741	\$ 154,705	\$ 3,964

# District of Columbia Government Salary Schedule: Comp Unit 1 & 2 (Union)



Fiscal Year: 2021 Service Code Definition: Social Worker & Student Trainee

Effective Date: October 11, 2020

Union/Nonunion: Union Affected CBU/Service Code(s): A22

Pay Plan/Schedule: CS Series: 0185 Social Worker  
 Peoplesoft Schedule: DS0080 X05 0186 Social Worker (Associate)

% Increase: 3.5%

Resolution Number:

Date of Resolution:

Grade	1	2	3	4	5	6	7	8	9	10	Between Steps
5	\$ 56,385	\$ 57,865	\$ 59,345	\$ 60,825	\$ 62,305	\$ 63,785	\$ 65,265	\$ 66,745	\$ 68,225	\$ 69,705	\$ 1,480
7	\$ 61,132	\$ 62,780	\$ 64,428	\$ 66,076	\$ 67,724	\$ 69,372	\$ 71,020	\$ 72,668	\$ 74,316	\$ 75,964	\$ 1,648
9	\$ 66,289	\$ 68,120	\$ 69,951	\$ 71,782	\$ 73,613	\$ 75,444	\$ 77,275	\$ 79,106	\$ 80,937	\$ 82,768	\$ 1,831
11	\$ 75,506	\$ 77,719	\$ 79,932	\$ 82,145	\$ 84,358	\$ 86,571	\$ 88,784	\$ 90,997	\$ 93,210	\$ 95,423	\$ 2,213
12	\$ 85,209	\$ 87,855	\$ 90,501	\$ 93,147	\$ 95,793	\$ 98,439	\$ 101,085	\$ 103,731	\$ 106,377	\$ 109,023	\$ 2,646
13	\$ 94,593	\$ 97,527	\$ 100,461	\$ 103,395	\$ 106,329	\$ 109,263	\$ 112,197	\$ 115,131	\$ 118,065	\$ 120,999	\$ 2,934

# District of Columbia Government Salary Schedule: Comp Unit 1 & 2



Fiscal Year: 2021 Service Code Definition: Health Care Occupations

Effective Date: October 11, 2020 Service Codes: A15, A39

Union/Nonunion: Union Job Series:

- 0603 Physicians Assistant
- 0620 Licensed Practical Nurse
- 0625 Autopsy Assistant Mortuary
- 0638 Recreation Therapist
- 0644 Medical Technologist
- 0645 Medical Technician
- 0647 Diagnostic Radiologic Technician
- 0649 Medical Instrument Technician
- 0681 Dental Assistant
- 0682 Dental Hygienist
- 0688 Sanitarian

Pay Plan/Schedule: CS  
 Peoplesoft Schedule: DS0069 X06  
 % Increase: 3.5%

Resolution Number:  
 Date of Resolution:

Grade	Step												Between Steps											
	1	2	3	4	5	6	7	8	9	10	11	12												
5	\$ 44,558	\$ 45,769	\$ 46,980	\$ 48,191	\$ 49,402	\$ 50,613	\$ 51,824	\$ 53,035	\$ 54,246	\$ 55,457	\$ 56,668	\$ 57,879	\$ 59,090	\$ 60,301	\$ 61,512	\$ 62,723	\$ 63,934	\$ 65,145	\$ 66,356	\$ 67,567	\$ 68,778	\$ 70,000		
6	\$ 49,386	\$ 50,728	\$ 52,070	\$ 53,412	\$ 54,754	\$ 56,096	\$ 57,438	\$ 58,780	\$ 60,122	\$ 61,464	\$ 62,806	\$ 64,148	\$ 65,490	\$ 66,832	\$ 68,174	\$ 69,516	\$ 70,858	\$ 72,200	\$ 73,542	\$ 74,884	\$ 76,226	\$ 77,568	\$ 78,910	
7	\$ 53,108	\$ 54,610	\$ 56,112	\$ 57,614	\$ 59,116	\$ 60,618	\$ 62,120	\$ 63,622	\$ 65,124	\$ 66,626	\$ 68,128	\$ 69,630	\$ 71,132	\$ 72,634	\$ 74,136	\$ 75,638	\$ 77,140	\$ 78,642	\$ 80,144	\$ 81,646	\$ 83,148	\$ 84,650	\$ 86,152	\$ 87,654
8	\$ 58,585	\$ 60,239	\$ 61,893	\$ 63,547	\$ 65,201	\$ 66,855	\$ 68,509	\$ 70,163	\$ 71,817	\$ 73,471	\$ 75,125	\$ 76,779	\$ 78,433	\$ 80,087	\$ 81,741	\$ 83,395	\$ 85,049	\$ 86,703	\$ 88,357	\$ 90,011	\$ 91,665	\$ 93,319	\$ 94,973	\$ 96,627
9	\$ 64,470	\$ 66,298	\$ 68,126	\$ 69,954	\$ 71,782	\$ 73,610	\$ 75,438	\$ 77,266	\$ 79,094	\$ 80,922	\$ 82,750	\$ 84,578	\$ 86,406	\$ 88,234	\$ 90,062	\$ 91,890	\$ 93,718	\$ 95,546	\$ 97,374	\$ 99,202	\$ 101,030	\$ 102,858	\$ 104,686	\$ 106,514
10	\$ 70,762	\$ 72,767	\$ 74,772	\$ 76,777	\$ 78,782	\$ 80,787	\$ 82,792	\$ 84,797	\$ 86,802	\$ 88,807	\$ 90,812	\$ 92,817	\$ 94,822	\$ 96,827	\$ 98,832	\$ 100,837	\$ 102,842	\$ 104,847	\$ 106,852	\$ 108,857	\$ 110,862	\$ 112,867	\$ 114,872	\$ 116,877
11	\$ 77,734	\$ 79,942	\$ 82,150	\$ 84,358	\$ 86,566	\$ 88,774	\$ 90,982	\$ 93,190	\$ 95,398	\$ 97,606	\$ 99,814	\$ 102,022	\$ 104,230	\$ 106,438	\$ 108,646	\$ 110,854	\$ 113,062	\$ 115,270	\$ 117,478	\$ 119,686	\$ 121,894	\$ 124,102	\$ 126,310	\$ 128,518
12	\$ 93,144	\$ 95,791	\$ 98,438	\$ 101,085	\$ 103,732	\$ 106,379	\$ 109,026	\$ 111,673	\$ 114,320	\$ 116,967	\$ 119,614	\$ 122,261	\$ 124,908	\$ 127,555	\$ 130,202	\$ 132,849	\$ 135,496	\$ 138,143	\$ 140,790	\$ 143,437	\$ 146,084	\$ 148,731	\$ 151,378	\$ 154,025



# District of Columbia Government Salary Schedule: Comp Unit 1 & 2 (Union)



Fiscal Year: 2021  
 Service Code Definition: Maintenance, Trades, & Labor

Effective Date: October 11, 2020

L- Leader

Union/Nonunion: Union  
 Affected CBU/Service Code(s): B01 Regular  
 B02 Leader

Pay Plan/Schedule: RW  
 Peoplesoft Schedule: WS0029  
 WS0034- Leaders  
 X07 (Leaders previously X08)

% Increase: 3.5%

Resolution Number:

Date of Resolution:

Grade	Step										Between Steps	
	1	2	3	4	5	6	7	8	9	10		
02 \$	17.50	18.11	18.72	19.33	19.94	20.55	21.16	21.77	22.38	22.99	\$	0.61
02L \$	19.07	19.74	20.41	21.08	21.75	22.42	23.09	23.76	24.43	25.10	\$	0.67
03 \$	18.89	19.53	20.17	20.81	21.45	22.09	22.73	23.37	24.01	24.65	\$	0.64
03L \$	20.66	21.37	22.08	22.79	23.50	24.21	24.92	25.63	26.34	27.05	\$	0.71
04 \$	20.21	20.91	21.61	22.31	23.01	23.71	24.41	25.11	25.81	26.51	\$	0.70
04L \$	22.16	22.92	23.68	24.44	25.20	25.96	26.72	27.48	28.24	29.00	\$	0.76
05 \$	21.62	22.35	23.08	23.81	24.54	25.27	26.00	26.73	27.46	28.19	\$	0.73
05L \$	23.53	24.35	25.17	25.99	26.81	27.63	28.45	29.27	30.09	30.91	\$	0.82
06 \$	22.84	23.64	24.44	25.24	26.04	26.84	27.64	28.44	29.24	30.04	\$	0.80
06L \$	25.11	25.97	26.83	27.69	28.55	29.41	30.27	31.13	31.99	32.85	\$	0.86
07 \$	24.37	25.21	26.05	26.89	27.73	28.57	29.41	30.25	31.09	31.93	\$	0.84
07L \$	26.61	27.54	28.47	29.40	30.33	31.26	32.19	33.12	34.05	34.98	\$	0.93
08 \$	25.76	26.64	27.52	28.40	29.28	30.16	31.04	31.92	32.80	33.68	\$	0.88
08L \$	28.15	29.15	30.15	31.15	32.15	33.15	34.15	35.15	36.15	37.15	\$	1.00
09 \$	27.01	27.95	28.89	29.83	30.77	31.71	32.65	33.59	34.53	35.47	\$	0.94
09L \$	29.65	30.67	31.69	32.71	33.73	34.75	35.77	36.79	37.81	38.83	\$	1.02
10 \$	28.39	29.38	30.37	31.36	32.35	33.34	34.33	35.32	36.31	37.30	\$	0.99
10L \$	31.15	32.23	33.31	34.39	35.47	36.55	37.63	38.71	39.79	40.87	\$	1.08
11 \$	29.79	30.83	31.87	32.91	33.95	34.99	36.03	37.07	38.11	39.15	\$	1.04
11L \$	32.64	33.78	34.92	36.06	37.20	38.34	39.48	40.62	41.76	42.90	\$	1.14
12 \$	31.15	32.23	33.31	34.39	35.47	36.55	37.63	38.71	39.79	40.87	\$	1.08
12L \$	34.15	35.32	36.49	37.66	38.83	40.00	41.17	42.34	43.51	44.68	\$	1.17
13 \$	32.47	33.60	34.73	35.86	36.99	38.12	39.25	40.38	41.51	42.64	\$	1.13
13L \$	35.50	36.78	38.06	39.34	40.62	41.90	43.18	44.46	45.74	47.02	\$	1.28

# District of Columbia Government Salary Schedule: Comp Unit 1 & 2 (Union)



Fiscal Year: 2021 Service Code Definition: Correctional Officers & EMS

Effective Date: October 11, 2020

Union/Nonunion: Union Affected CBU/Service Code(s): A01, A03, A20, A21

Pay Plan/Schedule: CS Series: 0007 Correctional Officer  
 Peoplesoft Schedule: DS0070 0083 Special Police Officer  
 X10 0699 EMT/Paramedic

% Increase: 3.5%

Resolution Number:

Date of Resolution:

Grade	1	2	3	4	5	6	7	8	9	10	Between Steps
5	\$ 46,997	\$ 48,203	\$ 49,409	\$ 50,615	\$ 51,821	\$ 53,027	\$ 54,233	\$ 55,439	\$ 56,645	\$ 57,851	\$ 1,206
6	\$ 50,719	\$ 52,064	\$ 53,409	\$ 54,754	\$ 56,099	\$ 57,444	\$ 58,789	\$ 60,134	\$ 61,479	\$ 62,824	\$ 1,345
7	\$ 54,038	\$ 55,561	\$ 57,084	\$ 58,607	\$ 60,130	\$ 61,653	\$ 63,176	\$ 64,699	\$ 66,222	\$ 67,745	\$ 1,523
8	\$ 59,579	\$ 61,265	\$ 62,951	\$ 64,637	\$ 66,323	\$ 68,009	\$ 69,695	\$ 71,381	\$ 73,067	\$ 74,753	\$ 1,686
9	\$ 65,585	\$ 67,445	\$ 69,305	\$ 71,165	\$ 73,025	\$ 74,885	\$ 76,745	\$ 78,605	\$ 80,465	\$ 82,325	\$ 1,860
10	\$ 71,966	\$ 74,011	\$ 76,056	\$ 78,101	\$ 80,146	\$ 82,191	\$ 84,236	\$ 86,281	\$ 88,326	\$ 90,371	\$ 2,045



GOVERNMENT OF THE DISTRICT OF COLUMBIA  
COMMISSION ON AGING



October 24, 2018

**Sign-in Sheet**

Name	Address	Phone	Ward	✓
Chairwoman Carolyn Nicholas	6101 16 <sup>th</sup> St., N.W. #514, WDC 20011	202-723-2939	4	✓
Interim Chair Guleford Bobo	707 Alabama Avenue, SE, WDC 20032	202-286-6166	8	✓
Brenda Atkinson-Willoughby	1745 North Portal Dr., N.W., WDC 20012	202-829-9323	4	
Barbara S. Hair	4136 2nd Street, S.W. WDC 20032	202-562-8933	8	✓
Charles Hicks	905 Sixth St., S.W. # 302B, WDC 20024	202-421-8608	6	✓
John Giacomini	5114 Klingle Street, N.W., WDC 20016	202-906-0643	3	✓
Barbara Lee	668 Jefferson Street, NE WDC 20011	202-529-3255	5	✓
Grace J. Lewis	4945 Sargent Rd., N.E., WDC 20017	202-526-7696	5	
Alice Love	403 9 <sup>th</sup> Street, N.E., WDC 20002	202-744-3961	6	
Carolyn Matthews	732 Quebec Place, N.W., WDC 20010	202-723-3456	1	
Marguerite Pridgen	3881 Newark Street, N.W., WDC 20016	202-450-9010	3	
Mary Taylor	4215 Hildreth Street, S.E., WDC 20019	202-581-5682	7	✓
Lystra Hinds		202-213-0232	4	
Nancy Miranda	2750 14th Street, NW #205, WDC 20009	202-276-1212	1	✓
Hattie Pierce	2861 31st Place, N.E., WDC 20018	202-705-5023	5	✓
Constance Woody	4338 Gorman Terrace, S.E., WDC 20019	202-575-8666	7	
Danilo Pelletiere	DHCD Rep			
Mary Terrell	DOES Rep			✓

Councilmember Anita Bonds	Irene Kang	DC Council Rep			✓
David Quick		DCPL Rep			
Cesar Barreto		DDOT Rep			
Danielle Creek		DCPR Rep			
Sheila Jones		DHS Rep			
Veronica Longstreth		DOH Rep			
LaQuandra Nesbitt		DOH			✓
Vivian Guerra		DDOT			✓
Sylvester Bush		Coalition to Restore DC Pension			✓
Janet Roid		Ward 5 resident			✓



GOVERNMENT OF THE DISTRICT OF COLUMBIA  
COMMISSION ON AGING



November 28, 2018

**Sign-in Sheet**

Name	Address	Phone	Ward	✓
Interim Chair Guleford Bobo	707 Alabama Avenue, SE, WDC 20032	202-286-6166	8	✓
Interim Vice Chair Carolyn Matthews	732 Quebec Place, N.W., WDC 20010	202-723-3456	1	✓
Barbara S. Hair	4136 2nd Street, S.W. WDC 20032	202-562-8933	8	✓
Charles Hicks	905 Sixth St., S.W. # 302B, WDC 20024	202-421-8608	6	✓
John Giacomini	5114 Klingle Street, N.W., WDC 20016	202-906-0643	3	
Barbara Lee	668 Jefferson Street, NE WDC 20011	202-529-3255	5	
Grace J. Lewis	4945 Sargent Rd., N.E., WDC 20017	202-526-7696	5	
Alice Love	403 9 <sup>th</sup> Street, N.E., WDC 20002	202-744-3961	6	
Marguerite Pridgen	3881 Newark Street, N.W., WDC 20016	202-450-9010	3	
Mary Taylor	4215 Hildreth Street, S.E., WDC 20019	202-581-5682	7	✓
Lystra Hinds		202-213-0232	4	
Nancy Miranda	2750 14th Street, NW #205, WDC 20009	202-276-1212	1	✓
Hattie Pierce	2861 31st Place, N.E., WDC 20018	202-705-5023	5	✓
Danilo Pelletiere	DHCD Rep			
Mary Terrell	DOES Rep			
Councilmember Anita Bonds	DC Council Rep			
David Quick	DCPL Rep			✓
Cesar Barreto	DDOT Rep			

Danielle Creek	DCPR Rep			
Sheila Jones	DHS Rep			
Veronica Longstreth	DOH Rep			✓
HECTOR RODRIGUEZ	DC COUNCIL			
NEWKIRK	SR POLICE ACADEMY			
RICHARD PRICE	POLICE ACADEMY			





GOVERNMENT OF THE DISTRICT OF COLUMBIA  
COMMISSION ON AGING



January 23, 2019

**Sign-in Sheet**

Name	Address	Phone	Ward	✓
Interim Chair Guleford Bobo	707 Alabama Avenue, SE, WDC 20032	202-286-6166	8	✓
Interim Vice Chair Carolyn Matthews	732 Quebec Place, N.W., WDC 20010	202-723-3456	1	✓
Barbara S. Hair	4136 2nd Street, S.W. WDC 20032	202-562-8933	8	
Charles Hicks	905 Sixth St., S.W. # 302B, WDC 20024	202-421-8608	6	
John Giacomini	5114 Klinge Street, N.W., WDC 20016	202-906-0643	3	
Barbara Lee	668 Jefferson Street, NE WDC 20011	202-529-3255	5	✓
Grace J. Lewis	4945 Sargent Rd., N.E., WDC 20017	202-526-7696	5	
Alice Love	403 9 <sup>th</sup> Street, N.E., WDC 20002	202-744-3961	6	✓
Marguerite Pridgen	3881 Newark Street, N.W., WDC 20016	202-450-9010	3	
Mary Taylor	4215 Hildreth Street, S.E., WDC 20019	202-581-5682	7	✓
Lystra Hinds	4326 3rd St NW 20011	202-213-0232	4	✓
Nancy Miranda	2750 14th Street, NW #205, WDC 20009	202-276-1212	1	✓
Hattie Pierce	2861 31st Place, N.E., WDC 20018	202-705-5023	5	✓
Danilo Pelletiere	DHCD Rep			
Mary Terrell	DOES Rep			
Councilmember Anita Bonds	DC Council Rep Hector Rodriguez			✓
David Quick	DCPL Rep h.rodriguez@dccouncil.org			
Cesar Barreto	DDOT Rep			

Danielle Creek	DCPR Rep			
Sheila Jones	DHS Rep			
Veronica Longstreth	DOH Rep			✓
Deborah Einstead	Alzheimer's Association			✓
Jo-Anne Hersh	Ward 2 resident			✓





GOVERNMENT OF THE DISTRICT OF COLUMBIA  
COMMISSION ON AGING



February 27, 2019

**Sign-in Sheet**

Name	Address	Phone	Ward	✓
Chair Guleford Bobo	707 Alabama Avenue, SE, WDC 20032	202-286-6166	8	✓
Vice Chair Carolyn Matthews	732 Quebec Place, N.W., WDC 20010	202-723-3456	1	✓
Barbara S. Hair	4136 2nd Street, S.W. WDC 20032	202-562-8933	8	✓
Charles Hicks	905 Sixth St., S.W. # 302B, WDC 20024	202-421-8608	6	
John Giacomini	5114 Klingle Street, N.W., WDC 20016	202-906-0643	3	
Barbara Lee	668 Jefferson Street, NE WDC 20011	202-529-3255	5	✓
Grace J. Lewis	4945 Sargent Rd., N.E., WDC 20017	202-526-7696	5	✓
Alice Love	403 9 <sup>th</sup> Street, N.E., WDC 20002	202-744-3961	6	✓
Marguerite Pridgen	3881 Newark Street, N.W., WDC 20016	202-450-9010	3	
Mary Taylor	4215 Hildreth Street, S.E., WDC 20019	202-581-5682	7	✓
Lystra Hinds		202-213-0232	4	
Nancy Miranda	2750 14th Street, NW #205, WDC 20009	202-276-1212	1	✓
Hattie Pierce	2861 31st Place, N.E., WDC 20018	202-705-5023	5	
Danilo Pelletiere	DHCD Rep			
Mary Terrell	DOES Rep			
Councilmember Anita Bonds	DC Council Rep <i>Feckler</i>			✓
David Quick	DCPL Rep			✓
Cesar Barreto	DDOT Rep			

Danielle Creek	DCPR Rep			
Sheila Jones	DHS Rep			
Veronica Longstreth	DOH Rep			✓
Ron Swanda				
Katharine Dixon	Rebuilding Together			
Riley Conrad	"			
Elizabeth Scott	"			
ERIKA COOKSEY	HORNER'S UNIVERSITY HOSPITAL			
J-anne Herish	Ward 2 resident			
Ingrid Hill	Ward 7 mini-commission			



GOVERNMENT OF THE DISTRICT OF COLUMBIA  
COMMISSION ON AGING



March 27, 2019

**Sign-in Sheet**

Name	Address	Phone	Ward	✓
Chair Guleford Bobo	707 Alabama Avenue, SE, WDC 20032	202-286-6166	8	✓
Vice Chair Carolyn Matthews	732 Quebec Place, N.W., WDC 20010	202-723-3456	1	✓
Barbara S. Hair	4136 2nd Street, S.W. WDC 20032	202-562-8933	8	✓
Charles Hicks	905 Sixth St., S.W. # 302B, WDC 20024	202-421-8608	6	
John Giacomini	5114 Klingle Street, N.W., WDC 20016	202-906-0643	3	
Barbara Lee	668 Jefferson Street, NE WDC 20011	202-529-3255	5	✓
Grace J. Lewis	4945 Sargent Rd., N.E., WDC 20017	202-526-7696	5	✓
Alice Love <i>sick</i>	403 9 <sup>th</sup> Street, N.E., WDC 20002	202-744-3961	6	
Marguerite Pridgen	3881 Newark Street, N.W., WDC 20016	202-450-9010	3	
Mary Taylor	4215 Hildreth Street, S.E., WDC 20019	202-581-5682	7	✓
Lystra Hinds		202-213-0232	4	
Nancy Miranda	2750 14th Street, NW #205, WDC 20009	202-276-1212	1	✓
Hattie Pierce	2861 31st Place, N.E., WDC 20018	202-705-5023	5	✓
Danilo Pelletiere	DHCD Rep			
Mary Terrell	DOES Rep			
Councilmember Anita Bonds ✓	DC Council Rep <i>Hector Bolden</i> ✓			✓
David Quick	DCPL Rep			✓
Cesar Barreto	DDOT Rep			✓

Danielle Creek	DCPR Rep			
Sheila Jones	DHS Rep			
Veronica Longstreth	DOH Rep			✓
Heather Trole				
Rox Swanda				
Christian Barona				
Irene Kong				





GOVERNMENT OF THE DISTRICT OF COLUMBIA  
COMMISSION ON AGING



May 22, 2019

**Sign-in Sheet**

Name	Address	Phone	Ward	✓
Chair Guleford Bobo	707 Alabama Avenue, SE, WDC 20032	202-286-6166	8	✓
Vice Chair Carolyn Matthews	732 Quebec Place, N.W., WDC 20010	202-723-3456	1	✓
Barbara S. Hair	4136 2nd Street, S.W. WDC 20032	202-562-8933	8	
Charles Hicks	905 Sixth St., S.W. # 302B, WDC 20024	202-421-8608	6	✓
John Giacomini	5114 Klingle Street, N.W., WDC 20016	202-906-0643	3	
Barbara Lee	668 Jefferson Street, NE WDC 20011	202-529-3255	5	✓
Grace J. Lewis	4945 Sargent Rd., N.E., WDC 20017	202-526-7696	5	✓
Alice Love	403 9 <sup>th</sup> Street, N.E., WDC 20002	202-744-3961	6	
Marguerite Pridgen	3881 Newark Street, N.W., WDC 20016	202-450-9010	3	✓
Mary Taylor	4215 Hildreth Street, S.E., WDC 20019	202-581-5682	7	✓
Lystra Hinds		202-213-0232	4	
Nancy Miranda	2750 14th Street, NW #205, WDC 20009	202-276-1212	1	✓
Hattie Pierce	2861 31st Place, N.E., WDC 20018	202-705-5023	5	
Danilo Pelletiere	DHCD Rep			
Mary Terrell	DOES Rep			
Councilmember Anita Bonds	DC Council Rep			
David Quick	DCPL Rep			✓
Cesar Barreto	DDOT Rep			

Danielle Creek	DCPR Rep			
Sheila Jones	DHS Rep			
Veronica Longstreth	DOH Rep			
Ron Swanda	Wald 61es			
Carily Mendie	DPR			
Ali Khavari	DDOT			
Jerry Kasunic	DFHV			
Margyente Fritzen	Coit			
Vivian Guerra	DDOT			
Heather Forte				
				



GOVERNMENT OF THE DISTRICT OF COLUMBIA  
COMMISSION ON AGING



June 26, 2019

**Sign-in Sheet**

Name	Address	Phone	Ward	✓
Chair Guleford Bobo	707 Alabama Avenue, SE, WDC 20032	202-286-6166	8	✓
Vice Chair Carolyn Matthews	732 Quebec Place, N.W., WDC 20010	202-723-3456	1	
John Giacomini	5114 Klingle Street, N.W., WDC 20016	202-906-0643	3	
Barbara S. Hair	4136 2nd Street, S.W. WDC 20032	202-562-8933	8	
Jo Anne Hersh	2202 Kalarama Rd NW	<del>202-701-7966</del> 202-684-6620	2	✓
Charles Hicks	905 Sixth St., S.W. # 302B, WDC 20024	202-421-8608	6	✓
Lystra Hinds		202-213-0232	4	
Barbara Lee	668 Jefferson Street, NE WDC 20011	202-529-3255	5	✓
Grace J. Lewis	4945 Sargent Rd., N.E., WDC 20017	202-526-7696	5	
Alice Love	403 9 <sup>th</sup> Street, N.E., WDC 20002	202-744-3961	6	
Nancy Miranda	2750 14th Street, NW #205, WDC 20009	202-276-1212	1	
Hattie Pierce	2861 31st Place, N.E., WDC 20018	202-705-5023	5	✓
Marguerite Pridgen	3881 Newark Street, N.W., WDC 20016	202-450-9010	3	✓
Mary Taylor	4215 Hildreth Street, S.E., WDC 20019	202-581-5682	7	
Maria Wilson		202-603-3423	4	
Danilo Pelletiere	DHCD Rep			
Mary Terrell	DOES Rep			
Councilmember Anita Bonds	DC Council Rep			

David Quick	DCPL Rep			
Cesar Barreto	DDOT Rep			
Danielle Creek	DCPR Rep			
Sheila Jones	DHS Rep			
Veronica Longstreth	DOH Rep			
Weather Foote	Resident (Ward 1)			
Tony Pe. ↓				
Garrett King				





GOVERNMENT OF THE DISTRICT OF COLUMBIA  
COMMISSION ON AGING



2019 Retreat

**Sign-in Sheet**

Name	Address	Phone	Ward	✓
X Chair Guleford Bobo	707 Alabama Avenue, SE	202-286-6166	8	✓
X Vice Chair Carolyn Matthews	732 Quebec Place, NW	202-723-3456	1	✓
John Giacomini	5114 Klinge Street, NW	202-906-0643	3	
Barbara S. Hair	4136 2nd Street, SW	202-562-8933	8	
Jo Anne Hersh	2202 Kalarama Road, NW	202-701-7966	2	
Charles Hicks	905 Sixth St., S.W. # 302B	202-421-8608	6	✓
Lystra Hinds		202-213-0232	4	
✓ Barbara Lee	668 Jefferson Street, NE	202-529-3255	5	✓
X Grace J. Lewis	4945 Sargent Rd., NE	202-526-7696	5	✓
X Alice Love	403 9 <sup>th</sup> Street, NE	202-744-3961	6	✓
Nancy Miranda	2750 14th Street, NW #205	202-276-1212	1	✓
X Hattie Pierce	2861 31st Place, NE	202-705-5023	5	✓
X Marguerite Pridgen	3881 Newark Street, NW	202-450-9010	3	✓
✓ Mary Taylor	4215 Hildreth Street, SE	202-581-5682	7	✓
Maria Wilson		202-603-3423	4	
Danilo Pelletiere	DHCD Rep			
Mary Terrell	DOES Rep			
Councilmember Anita Bonds	DC Council Rep			

David Quick	DCPL Rep			
Cesar Barreto	DDOT Rep			
Danielle Creek	DCPR Rep			
Sheila Jones	DHS Rep			
Veronica Longstreth	DOH Rep			
Veronica Ingram				
Sam McCoy				
Sandra Werner				
LYNNETTE BARNHARDT				
Hector Rodriguez				



GOVERNMENT OF THE DISTRICT OF COLUMBIA  
COMMISSION ON AGING



September 25, 2019

**Sign-in Sheet**

Name	Address	Phone	Ward	✓
Chair Guleford Bobo	707 Alabama Avenue, SE	202-286-6166	8	✓
Vice Chair Carolyn Matthews	732 Quebec Place, NW	202-723-3456	1	✓
John Giacomini	5114 Klingle Street, NW	202-906-0643	3	
Barbara S. Hair	4136 2nd Street, SW	202-562-8933	8	
Jo Anne Hersh <i>Joanne Hersh</i>	2202 Kalarama Road, NW	202-701-7966	2	✓
Charles Hicks	905 Sixth St., S.W. # 302B	202-421-8608	6	✓
Lystra Hinds		202-213-0232	4	
Barbara Lee	668 Jefferson Street, NE	202-529-3255	5	✓
Grace J. Lewis	4945 Sargent Rd., NE	202-526-7696	5	✓
Alice Love	403 9 <sup>th</sup> Street, NE	202-744-3961	6	
Nancy Miranda	2750 14th Street, NW #205	202-276-1212	1	
Hattie Pierce	2861 31st Place, NE	202-705-5023	5	✓
Marguerite Pridgen	3881 Newark Street, NW	202-450-9010	3	
Mary Taylor	4215 Hildreth Street, SE	202-581-5682	7	✓
Maria Wilson		202-603-3423	4	
Danilo Pelletiere	DHCD Rep			
Mary Terrell	DOES Rep			
Councilmember Anita Bonds	DC Council Rep <i>Peelst</i>			✓



David Quick	DCPL Rep			
<del>Cesar Barreto</del> Vivian Guerra	DDOT Rep			
Danielle Creek	DCPR Rep			
Sheila Jones	DHS Rep			
Veronica Longstreth	DOH Rep			✓
Jeff Toney	OTR			
Matt Ramos	OTR			
Anna Scarlett	DHCB			
Heather Foote				
William Duivall	Member of Hayes Sax			
Tim Wilson	DHCD			
Melissa Bird	Census / office of planning			



GOVERNMENT OF THE DISTRICT OF COLUMBIA  
COMMISSION ON AGING



October 23, 2019

**Sign-in Sheet**

Name	Address	Phone	Ward	✓
Chair Guleford Bobo	707 Alabama Avenue, SE	202-286-6166	8	✓
Vice Chair Carolyn Matthews	732 Quebec Place, NW	202-723-3456	1	✓
John Giacomini	5114 Klinge Street, NW	202-906-0643	3	✓
Barbara S. Hair	4136 2nd Street, SW	202-562-8933	8	✓
Jo Anne Hersh	2202 Kalarama Road, NW	202-701-7966	2	✓
Charles Hicks	905 Sixth St., S.W. # 302B	202-421-8608	6	
Lystra Hinds		202-213-0232	4	
Barbara Lee	668 Jefferson Street, NE	202-529-3255	5	✓
Grace J. Lewis	4945 Sargent Rd., NE	202-526-7696	5	✓
Alice Love	403 9 <sup>th</sup> Street, NE	202-744-3961	6	
Nancy Miranda	2750 14th Street, NW #205	202-276-1212	1	
Hattie Pierce	2861 31st Place, NE	202-705-5023	5	
Marguerite Pridgen	3881 Newark Street, NW	202-450-9010	3	
Mary Taylor	4215 Hildreth Street, SE	202-581-5682	7	✓
Maria Wilson		202-603-3423	4	
Danilo Pelletiere	DHCD Rep			
Mary Terrell	DOES Rep			
Councilmember Anita Bonds	DC Council Rep			

David Quick	DCPL Rep	DQ			
<del>Cesar Barreto</del> Vivian Guerra	DDOT Rep	V.G			
<del>Danielle Creek</del>	DCPR Rep				
Sheila Jones	DHS Rep				
Veronica Longstreth	DOH Rep				
Buddy Moore	VISITOR / DDOT				
Vanessa Gerideau	DPR				
<del>David</del>					
Tiffany Oscar	The Washington Home Foundation				
Joule Pugh	The Washington Home Foundation				
SHARADA STRASMORE	DDOT				
Irene Kang	CM Bonds				
GEORGE ARNSTEIN	FORMER COMMISSIONER				
Hector Rodriguez	Council member Bonds office				
Delene Hunter	DPR				



GOVERNMENT OF THE DISTRICT OF COLUMBIA  
COMMISSION ON AGING



November 20, 2020

**Sign-in Sheet**

Name	Address	Phone	Ward	✓
Chair Guleford Bobo	707 Alabama Avenue, SE	202-286-6166	8	✓
Vice Chair Carolyn Matthews	732 Quebec Place, NW	202-723-3456	1	✓
John Giacomini	5114 Klingle Street, NW	202-906-0643	3	
Barbara S. Hair	4136 2nd Street, SW	202-562-8933	8	✓
Jo Anne Hersh	2202 Kalarama Road, NW	202-701-7966	2	✓
Charles Hicks	905 Sixth St., S.W. # 302B	202-421-8608	6	✓
Lystra Hinds		202-213-0232	4	
Barbara Lee	668 Jefferson Street, NE	202-529-3255	5	✓
Grace J. Lewis	4945 Sargent Rd., NE	202-526-7696	5	✓
Alice Love	403 9 <sup>th</sup> Street, NE	202-744-3961	6	
Nancy Miranda	2750 14th Street, NW #205	202-276-1212	1	✓
Hattie Pierce	2861 31st Place, NE	202-705-5023	5	
Marguerite Pridgen	3881 Newark Street, NW	202-450-9010	3	
Mary Taylor	4215 Hildreth Street, SE	202-581-5682	7	✓
Gloria J. Whitfield		202-678-8307	8	
Maria Wilson		202-603-3423	4	
Danilo Pelletiere	DHCD Rep			
Mary Terrell	DOES Rep			

David Quick	DCPL Rep				✓
<del>Cesar Barreto</del> Vivian Galerra	DDOT Rep				
Danielle Creek	DCPR Rep				
Sheila Jones	DHS Rep				
Veronica Longstreth	DOH Rep				
Mackenzie Matthews	DOEE				
Joelle Purdy	Washington Home				
Gloria J Whittfield	Ward 8 202 678 8307				





GOVERNMENT OF THE DISTRICT OF COLUMBIA  
COMMISSION ON AGING



January 22, 2020

**Sign-in Sheet**

Name	Address	Phone	Ward	✓
Chair Guleford Bobo	707 Alabama Avenue, SE	202-286-6166	8	✓
Vice Chair Carolyn Matthews	732 Quebec Place, NW	202-723-3456	1	✓
John Giacomini	5114 Klingle Street, NW	202-906-0643	3	
Barbara S. Hair	4136 2nd Street, SW	202-562-8933	8	✓
Jo Anne Hersh	2202 Kalarama Road, NW	202-701-7966	2	✓
Charles Hicks	905 Sixth St., S.W. # 302B	202-421-8608	6	
Lystra Hinds		202-213-0232	4	
Barbara Lee	668 Jefferson Street, NE	202-529-3255	5	✓
Grace J. Lewis	4945 Sargent Rd., NE	202-526-7696	5	✓
Alice Love	403 9 <sup>th</sup> Street, NE	202-744-3961	6	✓
Nancy Miranda	2750 14th Street, NW #205	202-276-1212	1	✓
Hattie Pierce	2861 31st Place, NE	202-705-5023	5	
Marguerite Pridgen	3881 Newark Street, NW	202-450-9010	3	
Mary Taylor	4215 Hildreth Street, SE	202-581-5682	7	✓
Gloria J. Whitfield		202-678-8307	8	
Maria Wilson		202-603-3423	4	
Danilo Pelletiere	DHCD Rep			
Mary Terrell	DOES Rep			

Councilmember Anita Bonds	DC Council Rep			
David Quick	DCPL Rep			
Vivian Guerra	DDOT Rep	V.G.		
Danielle Creek	DCPR Rep			
Sheila Jones	DHS Rep			
Veronica Longstreth	DOH Rep			✓
Tiffany Oscar	The Washington Home			
Cody Ugelini	Carewood Care			
CHARLENE WILLIAMS	WARD 7			

**D.C. Commission on Aging**  
**Wednesday, October 24, 2018**  
**10:00 a.m.**  
**AGENDA**

The Mission of the D.C. Commission on Aging is to advise the Executive Director, Office on Aging, the Mayor, the D.C. Council, and the general public on the needs and concerns of elderly D.C. resident (age 60+), incidents of bias against the aged in the administration of the laws of the District of Columbia, and cases of neglect and abuse of the aged, including financial exploitation. As such, the Commissioners serve as advocates on behalf of the District's nearly 108,000 elderly residents.

- I. Call to Order
- II. Review and Approval of Minutes Commissioners
- III. Presentations
  - a. DC Health Dr. LaQuandra Nesbitt  
Director
  - b. Department of Transportation Vivian Guerra  
Accessibility Coordinator
  - c. D.C. Office on Aging Update Laura Newland  
Director
- IV. New Business
  - a. Interim Leadership
- V. Committee Reports
  - a. Governance
  - b. Elder Abuse and Financial Exploitation Commissioner Carolyn Nicholas
  - c. Transportation Commissioner Charles Hicks
  - d. Education and Employment Commissioner Brenda Willoughby
  - e. Housing Commissioner Marguerite Pridgen
  - f. Information and Education
  - g. Health and Wellness Vice Chairman Guleford Bobo
- VI. Ward Reports

VII. Public Comment

VIII. Announcements

IX. Adjournment

*It was once said that the moral test of government is how that government treats those who are in the dawn of life, the children; those who are in the twilight of life, the elderly; and those who are in the shadows of life, the sick, the needy and the handicapped.*

*~ Hubert H. Humphrey ~*

*November 1, 1977*

**District of Columbia Commission on Aging  
Meeting Minutes for  
Wednesday, October 24, 2018**

**Attendance**

**Commissioners:** Carolyn Nicholas, Chairwoman; Guleford Bobo, Vice Chairman; Barbara Hair; Charles Hicks; Barbara Lee; John Giacomini; Carolyn Matthews; Mary Taylor; Nancy Miranda; Hattie Pierce

**Ex-Officio Members:** Mary Terrell (DOES)

**Members of the Public:** Irene Kang (DC Council); Dr. LaQuandra Nesbitt (DOH); Vivian Guerra (DDOT); Sylvester Bush (Coalition to Restore DC Pension Benefits); Janet Reid (Ward 5 Resident)

**D.C. Office on Aging (DCOA) Staff Present:** Laura Newland, Executive Director; Tanya Reid, Administrative Support Manager; Garret King, Chief of Staff

**I. Call to Order**

Carolyn Nicholas (Chairwoman) called the meeting to order at 10:15 am.

**II. Review and Approval of Minutes**

The meeting minutes from the Commission's September 2018 meeting were reviewed and approved without corrections.

**III. Presentations**

**DC Health**

Director Dr. LaQuandra S. Nesbitt gave an overview of DC Health. DC Health has an employee that sits with the Emergency Management Agency to listen and survey to anything that happens in the city that has a public health or health impact on the city such as events like the Arthur Capper fire. DC Health is also involved with health regulation and licensing. They ensure that people who provide healthcare services are health professionals of the highest quality in standard in terms of licensing this includes healthcare facilities such as hospitals, assisted living, skilled nursing and to certain extent some group living facilities. They operate a health and wellness center that provides services for tuberculosis and STDs. They have a new office, "The Office of Health Equity." In that office, they work with other agencies like the Department of Transportation and the Office of Planning. This is where DC Health plays a role the aging-in-place.

Dr. Nesbitt highlighted two of DC Health's five major goals.

1. Strengthening Public-Private partnership to ensure that community has all the resources and programming they need.
2. Focus on health and wellness. DC does not want to focus on disease and addressing disease processes when it occurs. Focusing on health and wellness is not just important to have a long life but to ensure that the quality of life is high.

Dr. Nesbitt also highlighted a few important issues related to seniors as well as a few initiatives.

- Fall Risk is extremely important falls or injuries can setup several debilitating consequences. Falls can cause not only broken bones but also head injuries. Falls are higher among whites and blacks in the District. Women tend to fall more frequently than men, which can partially be attributed to overall fitness – how much a person exercise, maintain bone mass, etc. Residents in Ward 4 has a higher fall risk. There are Fall's Free Coalition and Safe at Home to help reduce the number of falls.
- The Commodity Supplemental Food Program – focuses on improving the health of low-income seniors 60+ by distributing healthy food boxes to over 73 sites and home delivery. It serves over 5,000 seniors per month.
- Senior Farmers' Market Nutrition Program (SFMNP) – the program has been increasingly popular. Essentially every year since Mayor Bowser has been in office additional financial investments have been made to the program. The goal of the program is to increase access to fresh fruits and vegetables to seniors 60+. Seniors receive \$40 in checks. It is a one-time investment from June 1<sup>st</sup> – October 31<sup>st</sup>. It serves over 5,800 seniors per season.
- DC SNAP Ed – this program helps to increase the likelihood that seniors spend their SFMNP funds. The goal of the program is to provide education around healthy food choices and physically active lifestyles. DC Health does outreach at senior apartments, senior centers, and faith-based centers. They served nearly 11,00 District seniors.
- Produce Plus – participants of any of the District's financial assistant programs can go to participating Farmer's Market on any operational day, show their proof of financial benefit and receive \$10 to spend that day.
- DC Senior Dental Services Program – is a new initiative launching this year. It is because of legislation Councilmember Brandon Todd introduced after receiving feedback from seniors. This has never been done before, partly because most seniors have Medicaid dental health benefits but do not use it. In 2016, only 28% of seniors used their preventive health benefits, 78% did not. The data is similar for seniors who had insurance from their employer that converted over once they retired. Dental health is important because it affects your overall health. DC Health this program will increase utilization of comprehensive benefits. It is for seniors 65+ and have an adjusted gross income of less than \$100,000 per person.
- Adult Immunization – every person needs to have at least flu shot yearly, seniors need to receive their shingles immunizations, pneumococcal immunizations. The importance of these vaccines increases when seniors live in congregate settings like assisted living facilities.
- Self-Management Education and Support Programs – this program is for people with chronic conditions like high blood pressure and diabetes. Over 5,000 District seniors participate in this program.

- DC Quitline – helps people quit smoking. It’s free for DC residents. There is no such thing as too late to quit.

DC Health also does policy and regulatory work. Recently, they have been working to improve the conditions of assisted living facilities, they have made it required to have a registered nurse available at all times, increasing the requirements for abuse, neglect, and exploitation, including financial exploitation, and reporting of unusual activities in assisted living facilities. Some assisted living facilities in the District have only six beds.

Dr. Nesbitt reported that DC Health have been very involved with the Age-Friendly initiative. They were lead on Domain 8 – Community and Health Services. They held a lot of meetings in different communities and languages. They also had meetings focusing on LGBTQ seniors.

Commissioner Hicks thanked Dr. Nesbitt for an informative presentation. He asked if the reason the “falls” data is low for populations like Latino or Asian is because they are isolated and is difficult to reach. Dr. Nesbitt responded that the data from DC Health is complete and accurate; however, the numbers are based on people who presented at the Emergency Room for care. If they did not present to the Emergency room they were not represented in the numbers.

Commissioner Hicks asked if a senior is living with family how will they know what they qualify for. Dr. Nesbitt said DC Health that eligibility is based on the individual.

Chairwoman Nicholas also thanked Dr. Nesbitt for her presentation. She asked if DC Health provide oversight for in-home caregivers and do they license them. Dr. Nesbitt responded that they provide oversight to nursing personnel and home health aides. Assisted nursing personnel are a service to be regulated and the agency is promulgating those regulations now. All healthcare professionals go through mandatory criminal background investigation.

Chairwoman Nicholas asked if DC Health is responsible for health conditions in rental apartments. Dr. Nesbitt responded that they did not, that falls on DCRA.

Vice Chairman Bobo said he was informed back during the summers by seniors who was on the Produce Plus program that the process had changed. He said it was reported to him that seniors in wheelchairs was sitting out in 95-degree heat to get their vouchers. Dr. Nesbitt asked Vice Chairman Bobo to shoot her an email with the particulars; Produce Plus is not an advance pick up program.

Commissioner Hair asked what can be done about the people in line when the vouchers run out. Dr. Nesbitt stated that they invest a lot of money into the program; it is wildly popular program.

Commissioner Hicks asked if Dr. Nesbitt could comment on efforts with the HIV/AIDS, and Hepatitis not just LGBTQ but the whole framework for seniors. He also asked what DC Health looks at addressing Providence Hospital situation. Dr. Nesbitt responded that DC Health has very specific efforts around HIV/AIDS as it relates to seniors. The strategy is decrease the stigma of HIV/AIDS across all senior populations. Seniors are not excluded from the PrEP conversation. As it relates to the closure of Providence, there is still a bit of confusion. Council passed a law

the week before that indicated the Mayor had the authority to prevent the closing of Providence. It is a little misleading to the public. The closure of hospitals does not fall under the Mayor's authority; it falls under the State Health Planning and Development agency (SHPDA) which by law is not under Mayoral control. DC Hospital Association has been working on a contingency plan since July. Some hospitals have already reported that they can absorb the volume. The outlying question is how ambulances are going to move patients across the city.

Commissioner Miranda asked what the budget for Produce Plus and if it was distributed evenly among wards. She also asked what Produce Rx was? Dr. Nesbitt responded that she did not know the exact budget, but it was over a million dollars, also the funds are allocated to wards based on need. As far as Produce Rx, it is a program that allows physicians and healthcare providers to write prescriptions allowing patients to get produce.

Vice Chairman Bobo thanked DC Health Ex-Officio Member Veronica Longstreth for coming to the meetings and her help.

### **Department of Transportation (DDOT)**

Vivian Guerra from DDOT presented on accessibility and inclusion, which is small part of what DDOT does. DDOT has over 1,000 employees and 20 different divisions. DDOT focuses on Title II of the American Disability Act, which is State and Local Government which includes an element of public transportation. DDOT makes sure they are compliant by ensuring that people with disabilities have access to the public right of way, such as sidewalks, parking, curb ramps, and bus stops.

WMATA selects the location for bus stops based on need; DDOT will install signage and bus shelter if WMATA thinks it is warranted.

People are encouraged to call 311 to report accessibility issues and/or their wards DDOT Community Engagement staff person.

DDOT has an annual report that they give to the Federal showing how the District is moving towards being ADA compliant.

DDOT is looking into introducing adaptive bicycles such as tricycles as part of the Bike Share program. They are currently doing a survey to see what seniors may like.

### **D.C. Office on Aging Update**

Director Laura Newland (Director) started off by thanking Chairwoman Nicholas for her service. Director Newland said if you leave a rule and have fulfilled everything you wanted to fulfill, your dreams are too small. Chairwoman Nicholas is leaving with many things left on her agenda, it is not a reflection of the Chairwoman effectiveness it reflects how grand her scope and vision is for District seniors. Like a true advocate, the Chairwoman is never satisfied.

The Director gave an update on Arthur Capper. The relocation efforts are ongoing, progress is being made. DC Housing Authority is taking the lead. The Director has to get up-to-date numbers but out of DCOA's 49 clients close to 20 of them have received housing numbers.



There will be a roundtable for Arthur Capper before the DC Council on October 25<sup>th</sup>. The District will be represented, the Administration will have a representative from the Deputy Mayor's Office for Health and Humans Services, Human Services, Fire and EMS, and DC's Homeland Security. DCOA has served as a support agency; however, the agency has responded to its questions. The fire has opened the Director's eyes on things the agency can do better.

Commissioner Hicks asked if it has impacted the agency's budget. The Director responded that they were the agency's people and have been able to bring them in the fold. In the worst-case scenario, if everyone affected needed home-delivered meals, the agency would be able to absorb it. As far as case management, it raises the need to re-evaluate the current service provision. Currently, the Case Management services are done as a ward-based model; however, when it comes to emergencies like Arthur Capper, it needs to be Citywide.

The Director informed the Commission that there are two bills going before the DC Council on November 2<sup>nd</sup>, one that would make the agency a department and one for the 10-year strategic plan. Chairwoman Nicholas encouraged everyone to testify.

#### **IV. Goals and Objective Status Update**

Chairwoman Nicholas informed the Commission that Goals 1, 2, 7, 8, 9, 10, 12 were not accomplished.

Goal 3 was somewhat satisfied, but more work still needs to be done. Irene Kang from Councilwoman Bonds' office informed the Commission that the bill for the Elder Abuse Prevention Campaign will probably die because the word "campaign" has a temporary meaning; however, language was added to the Department bill as part of the mission statement.

Goal 11 was accomplished in Ward 7, Wards 2, 3, & 6 still need Mini-Commissions.

Goals 4, 5, 6, were accomplished.

Commissioner Hicks moved to accept the report given by Chairwoman Nicholas. All were in favor.

#### **V. Interim Leadership**

Commissioner Hair moved to nominate Vice Chairman Bobo as Interim Chair, Commissioner Hicks second the motion, all were in favor. Mr. Bobo accepted. Commissioner Pierce nominated Commissioner Hicks, Commissioner Hicks declined. Commissioner Hicks nominated Commissioner Miranda, Commissioner Miranda declined unless there were no other parties interested. Chairwoman Nicholas nominated Carolyn Matthews for Interim Vice Chair, Commissioner Miranda second the motion, all were in favor.

**VI. Public Comments**

Sylvester Bush is with the Coalition to Restore the DC Pension Benefit. Mr. Bush informed the Commission that the Coalition has been working for two years to get bill 22-0321, “Pension Exclusion Restoration Act of 2017”, passed that would restore up to \$20,000 of Civil Servants pension. The bill is in Councilmember Evans’ Committee. Councilmember Evans will not call the bill for a vote. Mr. Bush pointed out that Maryland residents can exclude \$29,000 from the Federal tax, DC residents can exclude anything. The bill has two-tiers, ages 62 – 64 to deduct up to \$10,000, ages 65+ can deduct up to \$20,000. Mr. Bush asked the Commission to join the Coalition and let the Council know that bill 22-0321 is a priority.

**VII. Adjournment**

The meeting was adjourned at 12:34 PM.

These minutes were recorded by Tanya Reid, Administrative Support Manager, Office on Aging, and were formally approved by the Commission on Aging on November 28, 2018.

Respectfully Submitted,



Tanya Reid  
Administrative Support Manager  
District of Columbia Office on Aging

**D.C. Commission on Aging**  
**Wednesday, November 28, 2018**  
**10:00 a.m.**  
**AGENDA**

- I. Call to Order
- II. D.C. Office on Aging Update Laura Newland  
Director
- III. Review and Approval of Minutes Commissioners
- IV. Introduction of Members
- V. New Business
  - a. Election of Chair and Vice Chair
  - b. New Committee Chairs
  - c. Change December Meeting Date
- VI. Committee Reports
  - a. Governance
  - b. Elder Abuse and Financial Exploitation
  - c. Transportation Commissioner Charles Hicks
  - d. Education and Employment
  - e. Housing Commissioner Marguerite Pridgen
  - f. Information and Education
  - g. Health and Wellness Vice Chairman Guleford Bobo
- VII. Ward Reports
- VIII. Public Comment
- IX. Announcements
- X. Adjournment



**District of Columbia Commission on Aging  
Draft Meeting Minutes for  
Wednesday, November 28, 2018**

**Attendance**

**Commissioners:** Guleford Bobo, Interim Chairman; Carolyn Matthews, Interim Vice Chairwoman; Barbara Hair; Charles Hicks; Mary Taylor; Nancy Miranda; Hattie Pierce

**Ex-Officio Members:** David Quick (DCPL); Veronica Longstreth (DOH)

**Members of the Public:** Hector Rodriguez (DC Council); Ms. Newkirk (President, Senior Citizen Police Academy); Richard Price (Treasurer, Senior Citizen Police Academy)

**D.C. Office on Aging (DCOA) Staff Present:** Laura Newland, Executive Director; Darlene Nowlin, Community Relations Specialist

**I. Call to Order**

Guleford Bob (Chairman) called the meeting to order.

**II. Review and Approval of Minutes**

The meeting minutes from the Commission's October 2018 meeting were reviewed and approved without corrections.

**III. Presentations**

**D.C. Office on Aging Update**

Director Laura Newland (Director) gave a couple of brief announcements. She informed the Commission that the Mayor's Annual Senior Holiday Celebration would be on December 12<sup>th</sup> at the DC Armory. She also informed the Commission that Committee on Housing and Community Development was marking up two bills on November 28, 2018. The first bill would make DCOA a department and a second bill on the strategic plan.

Interim Chairman Bobo informed the Director of two issues he heard while at a meeting where Councilmember Gray was the keynote speaker. The meeting dealt with health issues. He reported that someone made the suggestions that DCOA work with hospitals to get in the wellness centers because of the reductions in hospitals, and another person stated they were concerned that the home health aide organizations that were accused of embezzling funds are coming back to the community under different names. Regarding the first comment, the Director responded that the agency has to find a balance because DCOA is not a health care provider; there are agencies that are better with providing healthcare and regulating healthcare like Department of Healthcare Finance (DHCF) and DC Health. She pointed out that the grantee,

Mary's Center, in Wards 1 and 4 have a health background. DCOA will continue focusing on things like blood pressure, flu shots, and health fairs and increasing education and awareness programs around the demographics of the District. Regarding the second comment about providers being in the community under a different name, she commented that DHCF and DC Health is aware of it and are working to address those issues.

Interim Vice Chairwoman Matthews (Vice Chairwoman) pointed out that one of the issues with healthcare in Ward 1 – Mary's Center seniors think that the services are just for Hispanics; however, all seniors are welcomed. Commissioner Miranda stated that her mother was interpreter at Mary's Center; and informed the Commission that Mary's center also has an Amharic interpreter and doctor and that there are several Ethiopians who use the center. Vice Chairwoman Matthews believes Mary's Center can do a better job marketing to make sure they get a better mixed demographics.

Commissioner Hair asked the Director what changes will happen as a result of the name change. The Director responded that the legislation is focused on the name change and codifies DCOA's mission to include Elder Abuse Prevention as a part of outreach, but it will not affect the agency's substantive work. A lengthy conversation ensued amongst the commissioners about the importance of a name and how the agency is viewed among the community and other District agencies.

#### **IV. Elections**

The Interim Chairman asked for nominations. Commissioner Hicks nominated Interim Chairman Bobo, there were no other nominations. Commissioner Hicks moved acclamation to make interim Chairman Bobo the Chairman, Interim Vice Chairwoman Matthews second. Commissioner Hair nominated interim Vice Chairwoman Matthews as the Vice Chair. Commissioner Hicks moved to moved acclamation to make interim Vice Chairwoman Matthews the Vice Chairwoman. Both were voted unanimously.

#### **V. New Business**

The Commission voted to cancel December's meeting due to the holidays.

#### **VI. Committee Reports**

On behalf of the Health and Wellness Committee, the Chairman reported that Wards 2 and 3 are in the process of creating a virtual wellness program. They have been assisted by the Councilmembers and lead agencies in those wards. They have received over 600 comments from seniors in those wards regarding what seniors would like to see.

#### **VII. Ward Reports**

There were none.

#### **VIII. Public Comments**

The Chairman asked Ms. Newkirk, the incoming president of the Senior Citizen Police Academy, to give a brief overview of the Senior Citizen Police Academy. Ms. Newkirk informed the commission that she was not prepared to give an in-depth overview but did inform the Commission that the program started in 2005 with the goal to educate seniors and others in the community on ways to stay safe. The program is in the process of rebuilding. The Commissioners gave Ms. Newkirk some suggestions on how to rebuild the program.

**IX. Adjournment**

The meeting was adjourned at 11:04 AM.

These minutes were recorded by Darlene Nowlin, Community Relations Specialist, Office on Aging, and were formally approved by the Commission on Aging on January 32, 2019.

Respectfully Submitted,

A handwritten signature in black ink that reads "Darlene Nowlin". The signature is fluid and cursive, with a long horizontal stroke at the end.

Darlene Nowlin  
Community Relations Specialist  
District of Columbia Office on Aging

**D.C. Commission on Aging**  
**Wednesday, January 23, 2019**  
**10:00 a.m.**  
**AGENDA**

- I. Call to Order
- II. D.C. Office on Aging Update Laura Newland  
Director
- III. Review and Approval of Minutes Commissioners
- IV. Open Discussion
- V. Committee Reports
  - a. Governance
  - b. Elder Abuse and Financial Exploitation
  - c. Transportation Commissioner Charles Hicks
  - d. Education and Employment
  - e. Housing Commissioner Marguerite Pridgen
  - f. Information and Education
  - g. Health and Wellness Vice Chairman Guleford Bobo
- VI. Ward Reports
- VII. Public Comment
- VIII. Announcements
- IX. Adjournment



**District of Columbia Commission on Aging  
Meeting Minutes for  
Wednesday, January 23, 2019**

**Attendance**

**Commissioners:** Guleford Bobo, Chairman; Carolyn Matthews, Vice Chairwoman; Alice Love; Lystra Hinds; Barbara Lee; Mary Taylor; Nancy Miranda; Hattie Pierce

**Ex-Officio Members:** Veronica Longstreth (DOH)

**Members of the Public:** Hector Rodriguez (DC Council); Deborah Grimstead (Alzheimer's Association); Jo-Anne Hersh (Ward 2 Resident)

**D.C. Office on Aging (DCOA) Staff Present:** Aurora Delespin-Jones, Deputy Director; Garret King, Chief of Staff; Tanya Reid, Administrative Support Manager; Darlene Nowlin, Community Relations Specialist

**I. Call to Order**

Guleford Bob (Chairman) called the meeting to order at 10:20 am.

**II. Review and Approval of Minutes**

The meeting minutes from the Commission's November 28, 2018 meeting were reviewed and approved without corrections.

**III. Presentation(s)**

**D.C. Office on Aging Update**

Chief of Staff Garret King (COS) informed the Commission about a new position, Deputy Chief of Staff, Christian Barrera

The COS gave an update on Arthur Capper. He informed the Commission that DCOA had hired a temporary social worker to help with transitioning seniors into new houses. Of 161 residents displaced by the fire approximately 148 have been placed in new residences, a few went into nursing homes.

The agency's performance oversight hearing will tentatively be held on February 14, 2019 at the Wilson building.

The COS informed the Commission that the agency acquired the George Washington Health Insurance Counseling program. The agency provided grant funding to the program.

He also informed the Commission that the bill to change DCOA to a department did pass and it is currently on the Mayor's desk to sign.

Commissioner Alice Love asked where the residents of Arthur Capper were placed. The COS stated that they are throughout the city, but the majority are in Ward 6.

#### **IV. Open Discussion**

Chairman Bobo had a list of suggested topics to get the agency's feedback on to help Commissioners with answering questions in the community.

#### **Case Management**

The COS commented that the Commission should have their own feedback and opinion on issues. Mr. King informed the Commission that the Director will be addressing case management with the Senior Service Network. Regarding the Ward 8 Lead Agency, the lead agency currently has one social worker; two of their social workers left at the end of the year.

Vice Chairwoman Matthews asked how many case managers there are. COS responded that each ward has 3 – 4 social workers and there are 10 – 12 within DCOA.

Commissioner Love asked if the shortage of staff was due to funding. COS responded that the agency's funding is sufficient; it is more about the process and system.

Chairman Bobo said the lead agencies are having a retention problem. COS responded that the agency is looking at why retention is an issue especially with wards 7 & 8.

#### **Home Delivered Meals**

Chairman Bobo had concern that some wards had waiting lists. Deputy Director Aurora Delespin-Jones informed the Commission that the meals were based on priority. Priority 1s and 2s are worked on first. The agency looked into the waiting list issue and found that some on waiting lists had not been assessed and therefore are not truly on a waitlist. The main objective is to get meals to those that are priority one and two.

Commissioner Love asked how many contractors are providing meals. The COS responded that there are two contractors, Dutch Mill and Mom's Meal. The meal contract was bid on last year.

#### **Senior Housing**

In his visits at various senior housing complexes, Chairman Bobo found that seniors did not feel they could get services through DCOA. The COS encouraged the Commission to direct people the agency to places they believe the agency should do outreach.

## **Safe at Home**

Chairman Bobo wants to make sure that seniors are aware of the change in Area Median Income. The COS mentioned that DCOA was considering a cost sharing portion of Safe at Home through a partnership with Rebuilding Together. Rebuilding Together will present at February's meeting.

## **Senior Employment**

Commissioner Pierce asked if DCOA has a program that helps with senior employment. COS informed the Commission that the agency had two employment specialists about two years ago; however, they were transitioned to the Department of Employment Services (DOES) with the understanding that they still would be assisting seniors. DCOA's Director will meet with the DOES's new Director to make sure seniors have a clear path to receive services from DOES. Several commissioners expressed concern that seniors are not getting the services they need from DOES.

Commissioner Love suggested that DCOA have an employment component and that a taskforce could be put together to look further into the issue. COS is concerned that it would be a duplication of services, especially since DOES has the resources necessary.

## **Wellness Centers**

Vice Chair Matthews said a lot of food is being thrown away due to complaints of the food being "nasty." She also pointed out that home health aides are not staying with their clients. COS said the agency will speak with the wellness center directors to enforce home health aides staying with their clients. He would also talk to the nutritionist about the food.

## **Inclusion of All Seniors**

The Chairman has been receiving emails from former Vice Chair Swanda about LGBTQ seniors and their needs. The COS stated that DCOA had a LGBTQ advisory committee that came up with the three programs: Social eating program, Pride party, and peer to peer counseling.

Vice Chair Matthews brought up bullying; the COS suggested the agency could look into an anti-bullying campaign.

## **Lead Agency**

COS stated there is a lead agency in each ward they do case management, nutrition, outreach, etc. They are a "mini" DCOA in each ward; they are DCOA's community provider.

## **General**

Commissioner Pierce mentioned that buildings were receiving donated food from places like Costco, but the building "leader" was selling the donated food. COS said he could look into it.

## **Attendance**

The Chairman reiterated the importance of attendance and per the by-laws Commissioners must attend at least 70% of the meetings.

**V. Committee Reports**

**Health & Wellness**

The Chairman visited three wellness in the past month and found situations similar to what Vice Chair Matthews mentioned; it appears that some people are using the wellness centers like an adult day health.

Chairman Bobo spoke about the Medstar House Call program. The program provides services by zip code and the zip codes are around Washington Hospital Center. The program needs to expand to more of the city. A commissioner attested that the service was excellent.

**VI. Ward Report**

**Ward 8**

Chairman Bobo stated since the Commissions last meeting, there were at least 20 events for seniors. He felt the programs were very inclusive. The lead agency had an outstanding function, about 400 seniors attended.

**VII. Public Comments**

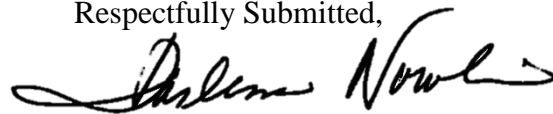
Hector Rodriguez provided a handout of a bill of emergency legislation to protect unpaid federal workers and contractors impacted by the Trump administration shutdown. The bill would require judges to put on hold any motion by a housing provider or lender to evict any federal worker or contractor during the federal shutdown and up to 90 days after the shutdown.

**VIII. Adjournment**

The meeting was adjourned at 11:53 AM.

These minutes were recorded by Darlene Nowlin, Community Relations Specialist, Office on Aging, and were formally approved by the Commission on Aging on February 27, 2019.

Respectfully Submitted,



Darlene Nowlin  
Community Relations Specialist  
District of Columbia Office on Aging

**D.C. Commission on Aging**  
**Wednesday, February 27, 2019**  
**10:00 a.m.**  
**AGENDA**

- I. Call to Order
- II. D.C. Office on Aging Update Laura Newland  
Director
- III. Review and Approval of Minutes Commissioners
- IV. Rebuilding Together Katharine Dixon,  
President & CEO
- V. Committee Reports
  - a. Governance
  - b. Elder Abuse and Financial Exploitation Commissioner Charles Hicks
  - c. Transportation
  - d. Education and Employment Commissioner Marguerite Pridgen
  - e. Housing
  - f. Information and Education
  - g. Health and Wellness Vice Chairman Guleford Bobo
- VI. Ward Reports
- VII. Public Comment
- VIII. Announcements
- IX. Adjournment

**District of Columbia Commission on Aging  
Meeting Minutes for  
Wednesday, February 27, 2019**

**Attendance**

**Commissioners:** Guleford Bobo, Chairman; Carolyn Matthews, Vice Chairwoman; Barbara Hair; Barbara Lee; Grace Lewis; Alice Love; Mary Taylor; Nancy Miranda; Hattie Pierce

**Ex-Officio Members:** Veronica Longstreth (DOH); David Quick (DCPL); Veronica Longstreth (DOH)

**Members of the Public:** Hector Rodriguez (DC Council); Ron Swanda (Former Ward 6 Commissioner); Jo-Anne Hersh (Ward 2 Resident); Katharine Dixon (Rebuilding Together); Riley Conrad (Rebuilding Together); Elizabeth Scott (Rebuilding Together); Erika Cooksey (Howard University Hospital); Ingrid Hill (Ward 7 Mini-Commission)

**D.C. Office on Aging (DCOA) Staff Present:** Laura Newland, Director; Garret King, Chief of Staff; Tanya Reid, Administrative Support Manager;

**I. Call to Order**

Guleford Bobo (Chairman) called the meeting to order at 10:10 am.

**II. Review and Approval of Minutes**

The meeting minutes from the Commission's January 23, 2019 meeting were reviewed and approved without correction.

**III. Presentation(s)**

**D.C. Department of Aging and Community Living (DACL) Update**

Director Laura Newland (Director) gave a brief overview of DACL's Performance Oversight Hearing. During the hearing concerns about space and potential waitlist were expressed; however, there were also a lot of compliments about the service providers. The overall tone was positive. DACL flagged a few items to follow-up on: figure out the waitlist for case management and the capital funding for the expansions and refreshers.

The Department's focus the Mayor's second term is ending social isolation and loneliness and figuring out how to create objective measures for that. Nothing will change about the current programming. The current programming is all related to getting people more engaged in the community; this will be a new way of looking at and evaluating the work. The agency is focusing on social isolation and loneliness because they affect a person's overall health. The health community is open and interested in working with the agency on this effort.

Commissioner Hair asked the Director why she could only use taxis the first fifteen days of the month to go everywhere; however, she could only use taxis for health appointments or to go to

work the last fifteen days of the month. The Director responded that the taxi program was TransportDC and the reason was cost. The only criteria to use the service is the client must be eligible for Metro Access; income is not a requirement.

Commissioner Miranda asked if intergenerational programming had been looked at to help with loneliness. The Director responded that the agency partnered with JumpStart which is an after-school reading program and seniors volunteered with the program. The agency also does Cupid Kid's – a program that allows elementary school kids to write Valentine's Day cards to homebound seniors and the homebound seniors can write a card back. The Chairman stated that the grantees also play a role with intergenerational programming. Congress Heights Senior Wellness Center is located next door to a daycare center and is one block away from a school. Both the daycare and the school come to the center for activities, where the seniors interact with the children. The Director commented that Congress Heights is unique; some wellness centers prefer not to do intergenerational programming.

Commissioner Lewis congratulated the Director on becoming a department. She asked if the change would allow senior programming at other District agency fall under "one roof." The Director responded that it would not. There are a lot of programs that affect seniors, and the agency would not be able to take it on and be effective. She used the example of sidewalks; seniors are concerned about sidewalks, but the agency is not equipped to handle those types of issues. There are advantages to having different agencies control different programs.

## **Rebuilding Together**

President and CEO Katharine Dixon informed the Commission that Rebuilding Together had served Virginia for more than 30 years. Rebuilding Together's main goal is to keep people in their homes in a safe manner and in communities with "rich" amenities. The organization's core program goes into the home of low-income homeowners and provides free, safe, and healthy home repairs. DACL's Safe at Home program serves people ages 60+ and/or someone with a disability, and who are low income; Rebuilding Together serves people who are any age.

According to Ms. Dixon, the Mayor approached Director Newland about piloting a program that would help moderate-income seniors 60+ and people with disabilities. Safe at Home currently serves residents who have an income lower than 80% of the Area Median Income (AMI). The pilot will serve residents who have an income of 80% - 100% of the AMI. The criteria is similar to Safe at Home: ages 60+ and/or have a disability and own your home in the District. There is a three or four-page list of acceptable home adaptations (handrails, lighting, etc.), and there is \$6,000 cap.

The application process:

1. Client calls a number to receive an application
2. Rebuilding Together mails out an application
3. Client completes and returns the application with necessary financial documentation
4. Rebuilding Together schedules a home visit with the client and an occupational therapist
5. Based on the home visit, Rebuilding Together will send a bill to clients home

6. Based on the client's income, DACL will pay between 25% and 50% of the cost of the adaptation
7. The client determines if they want to have the work completed
8. If the client chooses to move forward, Rebuilding Together will send the vendor out to complete the work

Chairman Bobo asked if a client calls for Safe at Home but does not qualify, will they be connected to Rebuilding Together. Katharine Dixon responded yes.

Elizabeth Scott conducted a focus group with the Commission to help Rebuilding Together fine-tune the program. The Commissioner's provided comments such as having the application available online, making sure the vendors are from the District, and having occupational therapists who speak multiple languages.

#### **IV. Committee Reports**

##### **Transportation**

Commissioner Taylor attended a meeting where sidewalks were discussed, DDOT will be working on the timing of the traffic lights.

##### **Housing**

Commissioner Love attended several meetings at the end of January and the beginning of February. Topics discussed: Tenants Right to Purchase, Elder Housing Resources, Concerns about Providence Hospital and the new hospital coming to St. Elizabeth East.

##### **Health & Wellness**

The Chairman visited three wellness in the past month. He made note that Model Cities will be putting together a behavioral health bulletin board.

#### **V. Ward Report**

##### **Ward 1**

Commissioner Miranda met with Jose Gutierrez, a senior and founder of DC Latino pride. Isolation was one of the issues facing the LGBTQ community. Mr. Gutierrez needs help with citizenship classes and administrative help in completing the citizenship application.

##### **Ward 4 and 8**

Chairman Bobo stated that Ward 4 had a spa day in January and Ward 8 had one in February. Seniors can get hair cuts, nails done, etc. It is a day to promote wellness. At Ward 4 Councilmember Todd's office gave out a packet that had a variety of information.



Commissioner Hair informed the Commission that there is an active Village in Ward 8. The Village will be going on a trip in June. Overlook and Bald Eagle rec center partnered together and had a successful Valentine's Day event.

## **Ward 5**

Commissioner Lewis informed the Commission that the next Ward 5 Mini-Commission would take place on March 16<sup>th</sup>.

### **VI. General Discussion**

Chairman Bobo stated he was contacted by Commissioner Giacomini who questioned if apartment buildings had to be ADA compliant. DCRA informed Chairman Bobo that a building's inspection is based on when it was built. If the building had major renovations, it would need to be brought up to code.

Commissioner Lewis informed the Commission that Councilmember Todd wants to increase the Homestead Exemption to \$125,000 per year. If the legislation is passed, it would cost the city approximately \$40,000,000 per year. The Senior Advisory Coalition requested input from the Commission. Commissioner Love had concerns that it would take away some of the other initiatives that are currently in place. She believed the Council should reject the tax cut. Former Vice Chair Swanda did not believe the plan was a good idea. Vice Chairwoman Matthews suggested to the Mayor that property taxes be tiered.

### **VII. Public Comments**


Hector Rodriguez stated that if the Commissioners emailed him the concerns about the property tax assessments, he would share them with Councilmember Bonds.

### **VIII. Adjournment**

The meeting was adjourned at 11:53 AM.

These minutes were recorded by Tanya Reid, Administrative Support Manager, DC Department of Aging and Community Living, and were formally approved by the Commission on Aging on March 27, 2019.

Respectfully Submitted,

  
Tanya Reid  
Administrative Support Manager  
DC Department of Aging and Community Living

**D.C. Commission on Aging**  
**Wednesday, March 27, 2019**  
**10:00 a.m.**  
**AGENDA**

- I. Call to Order
- II. D.C. Office on Aging Update Laura Newland  
Director
- III. Review and Approval of Minutes Commissioners
- IV. Housing Discussion Anita Bonds  
Councilmember At-Large
- V. Committee Reports
  - a. Governance
  - b. Elder Abuse and Financial Exploitation
  - c. Transportation Commissioner Charles Hicks
  - d. Education and Employment
  - e. Housing Commissioner Marguerite Pridgen
  - f. Information and Education
  - g. Health and Wellness Vice Chairman Guleford Bobo
- VI. Ward Reports
- VII. Public Comment
- VIII. Announcements
- IX. Adjournment

**District of Columbia Commission on Aging  
Meeting Minutes for  
Wednesday, March 27, 2019**

**Attendance**

**Commissioners:** Guleford Bobo, Chairman; Carolyn Matthews, Vice Chairwoman; Barbara Hair; Barbara Lee; Grace Lewis; Mary Taylor; Nancy Miranda; Hattie Pierce

**Ex-Officio Members:** Anita Bonds (DC Council); Veronica Longstreth (DOH);

**Members of the Public:** Hector Rodriguez (DC Council); Irene Kang (DC Council); Ron Swanda (Former Ward 6 Commissioner); Heather Foote

**D.C. Office on Aging (DCOA) Staff Present:** Laura Newland, Director; Garret King, Chief of Staff; Tanya Reid, Administrative Support Manager; Christian Barrera, Deputy Chief of Staff (DACL);

**I. Call to Order**

Guleford Bobo (Chairman) called the meeting to order at 10:10 am.

**II. Review and Approval of Minutes**

The meeting minutes from the Commission's February 20, 2019 meeting were reviewed and approved without correction.

**III. Presentation(s)**

**D.C. Department of Aging and Community Living (DACL) Update**

Director Laura Newland's made mention that she would be given Ten Town Hall Meetings starting the first week of April to discuss the Mayor's Budget. There would be a total reduction agency savings. Total number Safe at Home Six Million. Adult Protective Services (APS) will be shifting to the Department of Aging before 10/1/19. APS will be coming from 64 New York Avenue, Total number of FTE's 24 people. This means that the building will have to be reconfigured. 80% of what APS does is assisting seniors. Director Newland stated that she would like to move quickly to address problems and continuity. What are we able to do, provide better service, oversight, clarity, be consistent. Garret King, Chief of Staff would be in charge of operations and transition of movement for a smooth process.

Commissioner Nancy Miranda, Ward 1 had a question regarding Safe at Home. Director Newland said that there would be a 2-million-dollar increase, base budget would be 4 million dollars Commissioner Miranda asked about the disbursement of funds through the wards. Director Newland said that is done through historical numbers, influence of councilmembers, grants that are available and spending needs. Commissioner Miranda shared a suggestion that she received from the community that the "budget advisory committees" should mostly be citizens, not contractors. The Director responded that she has engaged citizens in the community about

budget and citizens generally only express concerns about specific items they want, they do not think globally.

Commissioner Barbara Hair, Ward 8 wanted to know how the funds were distributed. Director Newland explained, that you start with their budget and work backwards, demographics of the ward, no matter what ward they live in. Everyone should have fair access to the service that is needed.

### **Councilmember Anita Bonds – Housing Trust**

Councilmember Anita Bonds spoke with the people in attendance about feedback on housing, the mayor has allocated \$200 million.

She asked for input from the Commission about what should be done with the funding?

Vice Chairwoman Carolyn Matthews suggested that things should be simplified to process. She asked if there was an inventory on how many people will be using the program? Councilmember Bonds would propose a strategy of sending out information.

Commissioner Barbara Lee stated that people do not want to come out and asked how do you get the information to them? Councilmember Bonds says that the agencies have a huge task of information, public grants and loans.

Commissioner Barbara Hair says that something should be done to help the landlords. Councilmember Bonds made mention of the ERAC Program, a tenant who is in a bad financial situation can get assistance from the government up to \$4,200 dollars.

Chairman Bobo said that two developers are looking to come to Ward 8, around the Popular Point Area.

Councilmember Bonds said that by 2025 there will be 36,000 new housing units, 12,000 would be for lower income.

Vice Chairwoman Matthews made mention that some of her constituents, drug dealers have taken over her apartment and sell drugs.

### **IV. Committee Reports**

Will be held until the next meeting.

### **V. Ward Report**

#### **Ward 1**

Commissioner Miranda attended a Sage Meeting at DC Center. She met with the former director of Vida Center, Mario Cristaldi, and mentioned that the center is not receiving enough funding to assist the seniors. There is still disparity for the LGBTQ Community and minority groups. Reimbursement of funds is slow.

## **Ward 8**

Councilmember Trayon White held a Spring Start Event, 500 people attended, the Office of the Attorney General had a booth to address senior exploitation.

## **VI. General Discussion**

Commissioner Hair told the Commission that she'd spoken with Michael Kirkwood, former DACL General Counsel, says hello to everyone. He is working in with the City of Atlanta and is doing 1:1 community service.

Chairman Bobo thanked Ex-Officio Member Veronica Longstreth for helping to quickly resolve an issue with one of the wellness centers.

## **VII. Public Comment**

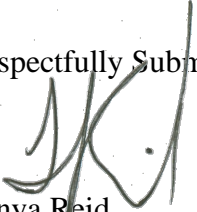
Heather Foote informed the Commission that the Age Friendly Transportation Committee is looking for input from seniors with traffic light timing.

## **VIII. Adjournment**

The meeting was adjourned at 12:14pm

These minutes were recorded by Tanya Reid, Administrative Support Manager, DC Department of Aging and Community Living, and were formally approved by the Commission on Aging on May 22, 2019.

Respectfully Submitted,



Tanya Reid  
Administrative Support Manager  
DC Department of Aging and Community Living

**D.C. Commission on Aging**  
**Wednesday, May 22, 2019**  
**10:00 a.m.**  
**AGENDA**

- I. Call to Order
- II. Review and Approval of Minutes Commissioners
- III. Presentations
  - a. D.C. Office on Aging Update Laura Newland  
Director
  - b. Department for Hired Vehicles Gerald Kasunic  
Administrative Officer
  - c. Department of Transportation Vivian Guerra  
Accessibility & Inclusion  
Coordinator
  - d. Department of Parks & Recreation Cecily Mendie  
Senior Coordinator
- IV. New Business
- V. Committee Reports
  - a. Governance b. Elder Abuse and Financial Exploitation
  - c. Transportation d. Education and Employment
  - e. Housing f. Information and Education
  - g. Health and Wellness h.
- VI. Ward Reports
- VII. Public Comment
- VIII. Announcements
- IX. Adjournment

**District of Columbia Commission on Aging  
Meeting Minutes for  
Wednesday, May 22, 2019**

**Attendance**

**Commissioners:** Guleford Bobo, Chairman; Carolyn Matthews, Vice Chairwoman; Barbara Hair; Barbara Lee; Grace Lewis; Mary Taylor; Nancy Miranda; Charles Hicks; Marguerite Pridgen

**Ex-Officio Members:** David Quick (DCPL); Veronica Longstreth (DOH)

**Members of the Public:** Ron Swanda (Former Ward 6 Commissioner); Ceily Mendie (DPR); Ali Khavari (DDOT); Jerry Kasunic (DFHV); Vivian Guerra (DDOT); Heather Foote (Age-Friendly City),

**D.C. Office on Aging (DCOA) Staff Present:** Laura Newland, Director; Garret King, Chief of Staff; Christian Barrera, Deputy Chief of Staff; Lance Holt, Chief of Staff

**I. Call to Order**

Guleford Bobo (Chairman) called the meeting to order at 10:11 am.

**II. Review and Approval of Minutes**

The meeting minutes from the Commission's March 2019 meeting were reviewed and approved with one correction regarding grant review panel.

**III. Presentation(s)**

**D.C. Department of Aging and Community Living (DACL) Update**

Director Laura Newland gave an update of the upcoming events for June. Pride Parade June 8<sup>th</sup>, Senior Symposium June 19<sup>th</sup>, Senior Fest June 28<sup>th</sup>, Ms. Senior DC Pageant June 30<sup>th</sup>. Director Newland mentioned that the budget was not final and would be revealed in June.

Chairman Bobo asked if the funding would help more wellness center programs. Director Newland's responded that the idea is to serve more people.

Commissioner Hicks wanted to acknowledge Veronica Pace for her service that she did as a director/community leader for the aging population. He also wanted to thank Director Laura and her staff for responding.

**Department For Hire Vehicles (DFHV)**

Administrative Officer Jerry Kasunic gave a PowerPoint presentation about DFHV agency, grants and Transport DC. The focus is on Wards 7 and 8, due to the fact that their data shows

that services people need are focused in other wards. Drivers only make \$26-36,000 a year, he is looking for FY20 to have the drivers make 25 dollars an hour. He noted that ridership has increased 14% each month.

Commissioner Lee wanted to know if people who have Metro Access can we use the service. The answer was yes. The average ride was 9:50 to 12:50 one way. Transport DC is \$10 round trip. Mr. Kasunic said that DFHV is looking to establish a Universal Driver ID, so that the drivers will be able to switch from Uber, Lyft, DFHV or any other ride share. Transport DC, is looking to establish were you can book in advance.

## **DC Department for Transportation**

Vivian Guerra and Ali Khavari of DDOT presented to the Commission

DDOT has a lunch and learn every month for the seniors

- 1) Safe and Private Transportation: This includes sidewalks, streetlights and signage, timed streetlights
- 2) Informed Travelers
- 3) Expand bicycle usage working with bike share, different types of bikes working with DPR.
- 4) Wanted to know where the problem areas that have the issues with crossing lanes and traffic signals. It was determined that it was Wards 7 and 8.

## **Department of Parks and Recreation**

Cecily Mendie DPR Facility Manger for the Wellness Centers annouced that the Senior Boat Ride would be July 19th. She has reached out to all of the Wellness Centers, only heard from 3. She is also looking to establish computer programs for the seniors and start a newsletter.

Chairman Bobo suggested that he would like to meet with Ms. Mendie on a regular basis, and have better resources for the seniors.

Vice Chairwoman Matthews would like all the Wellness Centers to interact with DPR.

## **IV. General Discussion**

Commissioner Hicks mentioned that the Commission's would be in July, and a committee will be established.

## **VII. Public Comment**

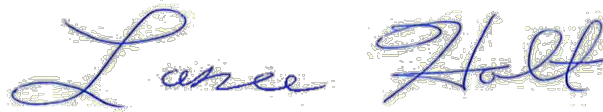


**VIII. Adjournment**

The meeting was adjourned at 12:05pm.

These minutes were recorded by W. Lance Holt, Staff Assistance, DC Department of Aging and Community Living, and were formally approved by the Commission on Aging on June 26, 2019.

Respectfully Submitted,

A handwritten signature in blue ink that reads "Lance Holt". The signature is written in a cursive style with a large initial "L" and "H".

Lance Holt  
Staff Assistant  
DC Department of Aging and Community Living

**D.C. Commission on Aging**  
**Wednesday, June 26, 2019**  
**10:00 a.m.**  
**AGENDA**

- I. Call to Order
- II. Review and Approval of Minutes Commissioners
- III. Presentations
  - a. D.C. Office on Aging Update Laura Newland  
Director
- IV. New Business
- V. Committee Reports
  - a. Governance b. Elder Abuse and Financial Exploitation
  - c. Transportation d. Education and Employment
  - e. Housing f. Information and Education
  - g. Health and Wellness h.
- VI. Ward Reports
- VII. Public Comment
- VIII. Announcements
- IX. Adjournment

**District of Columbia Commission on Aging  
Meeting Minutes for  
Wednesday, June 26, 2019**

**Attendance**

**Commissioners:** Guleford Bobo, Chairman; JoAnne Hersh, Charles Hicks, Barbara Lee, Hattie Pierce, Marguerite Pridgen,

**Members of the Public:** Heather Foote

**Department of Aging and Community Living (DACL) Staff Present:** Laura Newland, Director; Garret King, Chief of Staff; Heather Stowe Clinical Director, Tanya Reid, Administrative Support Manager

**I. Call to Order**

Guleford Bobo (Chairman) called the meeting to order at 10:11 am.

**II. Review and Approval of Minutes**

The meeting minutes from the Commission's May 29, 2019 meeting were reviewed and approved without correction.

**III. New Business**

Chairman Bobo started the session regarding the Senior Retreat, July 24<sup>th</sup>. The topics would be Age Discrimination, Senior Employment, and Insurance Agencies. He would like to have someone from AARP, Attorney General's Office to speak on these issues. He'd also like to have the commissioners ask seniors: What challenges are they facing in their Wards? The Commission would like to present their findings to the Mayor and City Council for FY2020.

Chief of Staff King said he would follow up for the locations that may be available, UDC, DOES, and Gallaudet University.

Director Newland introduced Heather Stowe, Clinical Director for the Department of Aging and Community Living. Director Newland said Adult Protective Services (APS) will be at the 500 K Street Location by October 1, 2019; this will be a 30% increase in staff.

Director Newland gave an update on the budget enhancements. The Council supported adding \$383,000 Club Memory for Alzheimer's Programing, \$67,000 for LGBTQ Programing.

Chief of Staff King said that the Ward 8 Wellness Center has been moved to FY 20 and FY 21 Funding.

Commissioner Bobo asked about the expansion of the wellness centers. Director Newland responded, that she met with City Administrator Rashad Young. There will be more conversations with DGS.

Director Newland thanked everyone who attended the Mayor's Senior Symposium. Commissioner Lee commented that there were a lot of Maryland residents who attended the Senior Symposium.

#### **IV. Committee Reports**

##### **Health and Wellness**

Groundbreaking, Senior Daycare Ward 8, projected opening December 2019. Commissioner Lee mentioned there were a lot of seniors dropped off at the Ft. Lincoln Senior Center with no engagement, some are being left in wheelchairs. Chief of Staff King said he would look into this issue. Commissioner Hersh mentioned that the donated computers at Claridge Towers were stolen. Chief of Staff King will also look into this issue.

#### **V. Ward Reports**

Most of the activities are sent out by Commissioner Bobo, to the commissioners as to what is available.

#### **VI. General Discussion**

Commissioner Bobo stated there is no stability in keeping a Senior Coordinator at DPR, he said that he would speak to Director Hunter about this issue.

Commissioner Lee mentioned that there are a lot of young people in her ward who have taken over some of the abandoned houses illegally. Commissioner Bobo said he would follow up with DCRA on this issue.

Administrative Support Manager Reid brought up the District Summer Meals Program for the youth. It's available in all 8 wards, breakfast and lunch.

Heather Foote said she would have a Transportation Option Table at the Senior Retreat.

Commissioner Hicks said he will be coordinating with Councilmember Allen and Director Newland in September. Two ward meetings for seniors (pilot project), how to reach the seniors in Ward 6, what services are available.

The meeting adjourned at 11:47am.

These minutes were recorded by Tanya Reid, Administrative Support Manager, DC Department of Aging and Community Living, and were formally approved by the Commission on Aging on September 25, 2019

Respectfully Submitted,

A handwritten signature in blue ink that reads "Lance Holt". The signature is written in a cursive style with a large initial "L" and "H".

Lance Holt  
Staff Assistant  
DC Department of Aging and Community Living

# 2019 Commission on Aging Retreat

July 24, 2019

**D.C. Commission on Aging Retreat**  
**Wednesday, July 24, 2019**  
**9:30 a.m. – 3:00 p.m.**  
**Presiding – Guleford Bobo, Chair, Commission on Aging**

**AGENDA**

9:30 a.m. – 10:00 a.m.

***BREAKFAST***

10:00 a.m. – 10:05 a.m.

Welcome & Greetings

Chairperson Guleford Bobo  
Commissioner, Ward 8

Laura Newland  
Executive Director, D.C. Office on Aging

10:05 a.m. – 11:05 a.m.

Mission

11:05 a.m. – 11:15 a.m.

***BREAK***

11:15 a.m. – 12:30 p.m.

Ward Input

12:30 p.m. – 1:30 p.m.

***LUNCH***

1:30 p.m. – 2:55 p.m.

Open Discussions

Commissioners

2:55 p.m. – 3:00 p.m.

Closing











**District of Columbia Commission on Aging  
Draft Retreat Minutes <sup>1</sup> for  
Wednesday, July 24, 2019**

**Attendance**

**Commissioners:** Guleford Bobo, Chairman; Vice Chairperson Carolyn Matthews, Charles Hicks, Barbara Lee, Grace J. Lewis, Alice Love, Nancy Miranda, Hattie Pierce, Marguerite Pridgen, Mary Taylor

**Ex-Officio:** Hector Rodriquez

**Members of the Public:** Veronica Ingram, Sam McCoy, Sandra Warren, Lynnette Barnhardt

**D.C. Office on Aging (DCOA) Staff Present:** Laura Newland, Director; Garret King, Chief of Staff; Adam Mingal General Counsel, Tanya Reid, Administrative Support Manager, Lance Holt, Staff Assistant.

**I. Welcome & Greetings**

Chairman Bobo and Director Newland, Office of Aging and Community Affairs both offered a welcome and greetings.

**II. Mission**

Chairman Bobo stated that the goal of the retreat would be to update the mission statement with no more than three goals to address in FY2020. The Commission would then focus three months on each issue.

General Counsel Mingal read the Commission's current mission statement.

Director Newland discussed Adult Protective Services (APS), she was how can the transition be smooth, Director Newland said that she has been in contact with Director Laura Zeilinger, (DHS).

With APS coming under DACL's umbrella, Commissioner Love felt that the commissioners should have more understanding about APS. Director Newland said she would have Heather Stowe, DACL's Clinical Director, have someone from APS attend an upcoming commissioner meeting to discuss their roles. She also said that APS will temporarily be housed at DHS but will be part of DACL's Portfolio.

Commissioner Hicks would like to know how the Commission on Aging can recommend and effect policy.

Commissioner Pierce was interested in how the Commission could support social workers.

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<sup>1</sup> The final (approved) meeting minutes will be posted on the Commission's next meeting date.

Commissioner Lewis was interested in Senior living in the facilities, Transportation, and Hospitals.

Guest Lynnette Barnhardt suggested affordable housing because rents start in the city at 2,500.

Commissioner Miranda suggested the goals should be clean and simple.

### **III. Ward Input Session**

Each commissioner summarized the issues they heard about in their wards.

#### **Ward 1**

Commissioner Miranda stated there was a crisis in her ward. Thousands of seniors were about to be displaced. The Mayor's office identified fourteen properties that will be shut down for renovation, four of the properties are in Ward 1. The seniors do not have legal representation, they need independent attorneys. She also stated that more handicapped parking was needed, and that bikes and scooters should not be on the sidewalk.

Vice Chair Matthews stated that real property tax was an issue, senior's taxes should only go to a certain level. She'd also like to see more funding for transportation and safety. She informed the commission that Council took \$2.5 Million from the Police Force; more police presence is needed.

#### **Ward 2**

General Counsel Mingal read a statement from Commissioner Hersh. She received feedback from the community.

- Claridge Towers seeks replacement of stolen computer equipment
- Georgetown Village would like more funding, housing and environment, no Health and Wellness Center
- Circle Village no Health and Wellness Center

#### **Ward 3**

Commissioner Pridgen reported that pedestrian safety was important. There is more traffic on residential streets. She talked with DDOT, scooters are a problem. More scooter and bike racks are needed. There should be incentives for ride sharing. Wellness should be incentivized.

#### **Ward 4**

Ward 4 Mini-Commission Chair Ingram said affordable housing, gentrification, lower to moderate housing units, help with real property tax assessments were important. She pointed out that there was no hospital or urgent care facilities in Ward 4. Mental and behavioral health amongst seniors was important, cost of living adjustment, scooters and bikes on sidewalks was an issue in her ward, and there is need for more handicapped street parking.

#### **Ward 5**

Commissioner Lee would like a cap on real property taxes, address DDOT, senior housing, and safety.

Commissioner Pierce would like to focus on transportation, health, Providence Hospital closing, safety in senior buildings, and buses to hold more motorized wheelchairs.

Commissioner Lewis would like to focus on seniors living in isolation and sizes of subsidized housing apartments for seniors, some are not big enough to accommodate wheelchairs.

#### **Ward 6**

Commissioner Love would like to focus on affordable housing and property taxes.

Commissioner Hicks said seniors need subsidized parking spaces, he'd also like to address needs of LGBTQ seniors. He informed the committee that he has been working with Councilmember Allen to have Director Newland at meetings in the community to explain what the Office of Aging and Community Living does.

#### **Ward 7**

Commissioner Taylor indicated that crime, homelessness, and a lack of hospitals were issues.

#### **Ward 8**

Commissioner Hair said affordable housing was an issue.

Chairman Bobo stated employment for seniors, safety in the wellness centers, and Community were issues.

Hector Rodriquez on behalf Councilmember Anita Bond suggested the Commission should contact their councilmembers to help with the issues presented.

#### **IV. Prioritization**

The topics presented in during the “Ward input” were clustered into 5 categories: Housing, Health and Wellness, Transportation, Safety, and other. Commissioners then voted to select at least one priority from each category. After reviewing all of the categories the Commission settled on focusing on two topics for FY20: Real Property Tax/affordable housing and mental and behavioral health.

## **VII. Wrap-Up**

Beginning in September, the Commission will spend ninety days working on one of the two topics, followed by the second topic. Once all topics have been addressed, the Commission will present this information to Council. Administrative Support Manager Reid agreed to send a recap to Chairman Bobo in time for the September meeting.

## **VIII. Adjournment**

The meeting was adjourned at 3:00 pm.

Respectfully Submitted,

W. Lance Holt  
Staff Assistant  
DC Department of Aging and Community Living

**D.C. Commission on Aging**  
**Wednesday, September 25, 2019**  
**10:00 a.m.**  
**AGENDA**

- I. Call to Order
- II. Review and Approval of Minutes Commissioners
- III. Presentations
  - a. Department of Aging and Community Living Laura Newland  
Director
  - b. Department of Housing and Community Development Anna Scarlett  
Project Manager
  - c. Office of Tax and Revenue Jeff Toney  
Unit Manager
  - d. DC Census 2020 Melissa Bird  
Executive Director
- IV. New Business
- V. Committee Reports
  - a. Governance b. Elder Abuse and Financial Exploitation
  - c. Transportation d. Education and Employment
  - e. Housing f. Information and Education
  - g. Health and Wellness
- VI. Ward Reports
- VII. Public Comment
- VIII. Announcements
- IX. Adjournment



**District of Columbia Commission on Aging  
Meeting Minutes for  
Wednesday, September 25, 2019**

**Attendance**

**Commissioners:** Guleford Bobo, Chairman; Carolyn Matthews, Vice Chairwoman; Barbara Lee; Grace Lewis; Mary Taylor; Charles Hicks; Jo Anne Hersh

**Ex-Officio Members:** Hector Rodriguez (DC Council); Veronica Longstreth (DOH); Vivian Guerra (DDOT)

**Members of the Public:** Jeffery Toney (OTR); Matt Ramos (OTR); Anna Scarlett (DHCD); Tim Wilson (OTR); Melissa Bird (Census); Heather Foote (Age-Friendly City), William Duvall

**D.C. Office on Aging (DCOA) Staff Present:** Laura Newland, Director; Tanya Reid, Administrative Support Manager

**I. Call to Order**

Guleford Bobo (Chairman) called the meeting to order at 10:10 am.

**II. Review and Approval of Minutes**

The meeting minutes from the Commission's June 2019 meeting were reviewed and approved with one correction regarding grant review panel.

**III. Presentation(s)**

**a. D.C. Department of Aging and Community Living (DACL) Update**

Director Laura Newland told the Commissioners that the Mayor's Annual Senior Holiday party will be December 19<sup>th</sup>, a week later than usual.

Director Newland informed the Commission that the agency's logo rebranding push will begin October 2<sup>nd</sup>. The agency will use the rebranding to expand the reach of the agency.

The agency is also revising the Grants Policy Manual to make it clearer thereby allowing the agency to hold grantees accountable in a more equitable way. No substantive changes will be made. It will be provided to the grantees and posted to the agency's website once everything is finalized.

Vice Chair Matthews asked the Director if she'd talk to Senior Wellness Center Directors about caretakers/home health aides leaving seniors in the center without care or supervision. Director Newland stated she's talked the wellness center directors several times. DAAC provides general guidance and

it is up the wellness center directors to enforce it. The centers are for people who can act independently, if not then, the caretakers should be with that person who always needs assistance.

Commissioner Pierce asked if DACL controlled the aides. Director Newland stated that the organizations who provide home health are regulated by DC Health. If you qualify for Medicaid, they are paid for and regulated by the Department of Health Care Finance. If you do not qualify for Medicaid, then that would be private pay, but the aides are still regulated by DC Health.

Chairman Bobo had concerns with recreation center usage. Vice Chairwoman suggested having Chairman Bobo mentioned the he spoke with Mr. Rankin at AARP regarding the Elder Abuse Response Team bill. Director Newland stated the administration's position is that this is an unnecessary additional committee; the "players" are already at the table at the monthly Elder Abuse Prevention Committee meetings. There are other ways to achieve what people want to see, which is more transparency, what happens with the cases, etc. These things will happen, a lot of positive changes will be happening.

**b. The Department of Housing and Community Development (DHCD)**

Project Manager Anna Scarlett gave a PowerPoint presentation on DHCD senior housing programs. Approximately \$1 billion was set aside in FY18 & FY19 through various housing programs to help with housing cost, that includes at least \$100 million annually for the Housing Production Trust Fund which is the largest trust fund per capita in the country. With these funds, seven thousand units of affordable housing have been created, with an additional forty-nine hundred in construction. The objective is to produce and preserve the quality of affordable housing, revitalize neighborhoods and economic opportunities. Mayor Bowser has challenged the region to produce two hundred and twenty thousand units.

A lengthy discussion ensued. Anna agreed to provide responses to several of the questions after the meeting.

**c. Office of Tax and Revenue (OTR)**

Unit Manager Jeffery Toney works for the Assessment Services division within the Real Property Tax Administration. Jeff talked about the several programs in OTR.

Homestead – is for DC residents who lives in and owns their property and the property is their primary residence. The Homestead takes a certain amount off the assessed value of the home. The amount changes annually, for 2019 the amount is \$74,850. If a resident meets the criteria, they can get the Homestead

exemption, but it will not be done retroactively. It will begin once OTR receives the application.

Senior Homestead – DC residents over the age of 65 with a household income for 2019 of \$133,100 qualify and name is on the deed. The senior homestead cuts property tax in half. Seniors must apply for the program. Mr. Toney warned the Commissioners about allowing family members to use their address when filing taxes, because when OTR does audits they look at the combined income of the house of everyone using that address to file taxes.

**d. DC 2020 Census**

Melissa Bird informed the Commissioners about the 2020 Census. The biggest change is that 2020 Census will be online for the first time. DC residents will receive an invitation in the mail to complete the census online. Residents can complete online or complete over the phone. Residents will receive several reminders via mail. If at a certain point the census is not completed, census takers will knock on the door to. It is best to complete the form during the self-response phase. The US Census has limited funding this year. The Census can be completed in several languages.

Everyone in the household should be on one form, relatives and non-relatives.

The Census is confidential. It cannot be shared with courts, ICE, local law enforcement, etc.


Ms. Bird warned the Commissioners to never give out your Social Security number, bank account information, etc. Scammers are already putting out false information.

**IV. Adjournment**

The meeting was adjourned at 12:22pm.

These minutes were recorded by Tanya Reid, Administrative Support Manager, DC Department of Aging and Community Living, and were formally approved by the Commission on Aging on October 23, 2019.

Respectfully Submitted,



Tanya Reid  
Administrative Support Manager  
DC Department of Aging and Community Living

**D.C. Commission on Aging**  
**Wednesday, October 23, 2019**  
**10:00 a.m.**  
**AGENDA**

- I. Call to Order
- II. Review and Approval of Minutes Commissioners
- III. Presentations
  - a. D.C. Office on Aging Update Laura Newland  
Director
  - b. Dockless Scooter Parking PSA (DDOT) Vivian Guerra  
A&C Coordinator
  - c. Department of Parks and Recreation Delano Hunter  
Director
  - d. Property Tax Abatement Bill Irene Kang  
Chief of Staff
- IV. New Business
  - a. November and December Schedule
- V. Committee Reports
  - a. Governance b. Elder Abuse and Financial Exploitation
  - c. Transportation d. Education and Employment
  - e. Housing f. Information and Education
  - g. Health and Wellness h.
- VI. Ward Reports
- VII. Public Comment
- VIII. Announcements
- IX. Adjournment

**District of Columbia Commission on Aging  
Meeting Minutes for  
Wednesday, October 23, 2019**

**Attendance**

**Commissioners:** Guleford Bobo, Chairman; Vice Chair Carolyn Matthews, John Giacomini, Barbara Hair, Jo Anne Hersh, Barbara Lee, Grace Lewis, Mary Taylor

**Ex-Officio Members:** David Quick (DCPL); Vivian Guerra (DDOT); Veronica Longstreth (DOH); Hector Rodriguez (DC Council)

**Members of the Public:** Buddy Moore (former Commissioner), Vanessa Gerideau (DPR), Tiffany Oscar, Joelle Purdy, Sharada Strasmore (DDOT), Irene Kang (DC Council), George Arnstein (former Commissioner), Delano Hunter (DPR)

**Department of Aging and Community Living (DACL) Staff Present:** Garret King, Chief of Staff, Tanya Reid, Administrative Support Manager, Lance Holt, Staff Assistant

**I. Call to Order**

Guleford Bobo (Chairman) called the meeting to order at 10:10 am.

**II. Review and Approval of Minutes**

The meeting minutes from the Commission's September 25, meeting were reviewed and approved without correction.

**III. Presentation(s)**

**a. Department of Aging and Community Living Update**

Chief of Staff Garret King mentioned that DACL is rolling out the agency's new brand. As part of the rollout the agency had townhall meetings at all of the wellness centers, discussing the agency's new brand and look. Seniors received some of new "swag", the Seabury vehicles has been rebranded with DACL's new logo.

Effective October 1<sup>st</sup>, Adult Protective Services (APS) was transferred to DACL. Clinical Director Heather Stowe is currently overseeing the team. The team is still housed at DHS, but hopefully by spring 2020 they will move to 500 K Street, after the build out is completed.

Refresher for all the Senior Wellness Centers should be done by December except for Congress Heights and Model Cities, as they will be having expansion. The expansions are scheduled to be completed by spring 2020; however, that may change once construction begins.

## **b. Dockless Scooter Parking DDOT**

DDOT's Accessibility and Inclusion Coordinator Vivian Guerra and Shared Micromobility planner Sharad Strasmore gave a presentation on the dockless scooters addressing the safety concerns and shared a Public Service Announcement (PSA).

The idea of dockless scooters is to provide the District with more multi-mobile transportation options, encouraging visitors and residents to use options other than driving.

The PSA educated people on to what to do with the dockless scooters while riding, how to park them, rules of the road, etc.

Commissioner Hersh asked how many corral parking spots there for the scooters are, there are currently about 11 corral parking spots.

Vice Chairwoman Matthews brought up the issue about the scooters in the neighborhood just being parked anywhere, and not being picked up in timely fashion. The scooters often block sidewalks. Vivian responded that unused vehicles are picked up within 5 days; however, if they are mis-parked it should be picked up within 2 hours. If any are mis-parked residents can call 311 for a service request or residents can email [dockless.mobility@dc.gov](mailto:dockless.mobility@dc.gov).

Commissioner JoAnne Hersh has been taking photos 6 months of the parking issues with scooters and bikes.

Chairman Bobo asked if there was a speed limit. The response was 10 mph.

Commissioner Barbara Lee asked who benefits from this. Vivian responded that the company receives the money from the user and the government receives a permit fee per vehicle. Any issues contact 311, any issues the commissioners put down in writing, so it will be brought to the attention of the DDOT Director, the Mayor and the Council.

## **c. Department of Parks and Recreation (DPR)**

Director Delano Hunter highlighted some of DPR's FY19 accomplishments. DPR operates nearly 100 locations: 68 recreation centers; 33 aquatic facilities, 22 of which are outside facilities. They operate over 3600 programs across all wards. They manage: 112 athletic facilities; 28 gyms; and about 200 unique park spaces. DPR has a senior division and senior offerings through DPR's other divisions. IN FY19 there were 50 senior classes offered at pools, including senior specific classes at 21 of the outdoor pools. DPR has partnerships with UDC and YMCA to assist DPR with senior programming.

DPR's Senior Division is led by Cecily Mendie. She is a recreational professional, she went to school for recreation. She reports to Vanessa Gerideau. There are 2 dedicated facilities for seniors, Ft. Stevens and Theodore Hagans. There are 4 main events: Senior Olympics, Senior Picnic, Senior Cruise and Senior Fun Camp. The senior fun camp took about 75 seniors for 5 days to a camp in Scotland, MD. Seniors were able to fish, bike, arts and crafts. In FY20 DPR launched a new art program: "Young at Art" at 7 different locations.

Mayor Bowser invested money for Ft. Lincoln revitalization to demolish the school and turn it into comprehensive rec center and will have senior specific space. Theodore Hagan rec center will be demolished, but the pool will remain. There are thriving programs at the Therapeutic Recreation Center (TRC), the current facility will be demolished and rebuilt. It will be renamed the Joy Evans Center. It will be completed 18 months after the TRC is demolished.

Chairman Bobo asked about the commissioners having their meetings at certain recreation centers. Director Hunter said the Mayor has directed DPR to waive permit fees for all-daytime senior activities. There is a different permit to reserve spaces. Chairman Bobo requested to have someone from DPR to attend the monthly Commission meetings. Director Hunter designated Ms. Mendie and if she cannot attend Ms. Gerideau.

Commissioner had an issue with reserving bus trips to Baltimore. Director Hunter stated typically the radius is about 30 miles. They may be able to make exception for a Baltimore excursion.

Commissioner Hersh asked about where the TRC is located and how do seniors access it. Director Hunter informed the commission that the TRC is Ward 7 across from Fort Dupont Park. The TRC support programming for seniors and people with developmental disabilities. They have day programs and inclusive camps for young people with special needs. The inclusive camps are the anchor for the center. DACL's Deputy Director Aurora Delespin-Jones is working with DPR on senior programming for the TRC. The new facility will have a larger pool.

#### **d. Property Tax Abatement Bill**

Councilmember Anita Bonds' Chief of Staff Irene Kang gave information on the Property Tax Abatement Bill. Currently, Office of Tax and Revenue has a deferral program for seniors. This allow seniors in two different categories 70 years and older and 75 older to defer their taxes. The difference in categories is the interest rate. Councilmember Bonds introduced a bill to help the lowest income seniors, seniors at 20% and 40% of the area median income. Those seniors can get 80% and 90% off of their taxes. It went to Councilmember

Evans' committee, but it died last council period. This year to Councilmember Bonds is looking to introduce another bill. They do not have draft, yet.

Commissioner Lee asked if her children would be responsible for the taxes that were deferred. Irene responded that her children would be responsible for whatever taxes that were deferred between the time a person opts into the program and the time ownership of the property changed.

Commissioner Hersh asked if constituent support would be helpful at the hearing? Irene responded that the bill has not been introduced yet, but they will encourage Councilmember McDuffie to hold a hearing when the time comes. And if and when a hearing is held, she will let the Commission know.

#### **IV. New Business**

Commissioner Bobo mentioned that the November and December meetings will be rescheduled due to the holidays. The Commission decided on November 20<sup>th</sup> 1:00pm and December 18<sup>th</sup> 10:00am.

#### **V. Committee Report**

Governance: None

Transportation: None

Housing: None

Health and Wellness: DGS has updated the Wellness Centers. The centers are have gotten new roofs, carpet, and paint. The participants got to pick new colors.

Information and Education: None

#### **VI. Ward Report**

Ward 1: Vice Chair Matthews would like someone to come in and explain the lead pipe assistance program. There are a lot of variables to explain, detailed and it is confusing for seniors to decipher the program.

Ward 2: Commissioner Hersh met with West End GW Village, they are appreciated of DACL and their services.

Ward 3: Commissioner Giacomini has been in touch frequently with Palisades Village leadership and he is a liaison for Iona Senior services and 4 congregations.



Ward 4: Chairman Bobo thanked Comcast for the laptops they contributed to the seniors. Wards 4,7, & 8 had senior spa day. He thanked DPR for their help.

Ward 5: Commissioner Lee was concerned with crimes in her area. People have been getting robbed. The issue has been discussed at ANC meetings.

## **VII. Announcements**

DCPL Ex-Officio member David Quick announced that the MLK Library will open up in one year, Lamond Riggs Library will open up in a year or two.

Hector Rodriguez mentioned that Councilmember Bonds has agreed to a DHCD Senior Housing Advisory Team, asking for volunteers.

Heather Foote announced that the Department for Hired Vehicles has suspended the shared ride program. If any sidewalk repairs are needed near the wellness centers or recreation centers, let her know and she will contact DDOT.

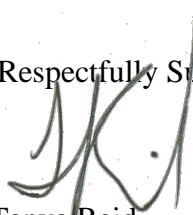
Chairman Bobo welcomed and thanked Former Ward 1 Commissioner, Buddy Moore, and former Ward 2 Commissioner, George Arnstein.

## **VIII. Adjournment**

The meeting was adjourned at 11:55am.

These minutes were recorded by Tanya Reid, Administrative Support Manager, DC Department of Aging and Community Living, and were formally approved by the Commission on Aging on November 20, 2019.

Respectfully Submitted,



Tanya Reid  
Administrative Support Manager  
DC Department of Aging and Community Living

**D.C. Commission on Aging**  
**Wednesday, November 20, 2019**  
**1:00 p.m.**  
**AGENDA**

- I. Call to Order
- II. Review and Approval of Minutes Commissioners
- III. Presentations
  - a. D.C. Office on Aging Update Laura Newland  
Director
  - b. Lead Pipe Replacement Program (DOEE) Mackenzie Matthews  
Energy Program Specialist
- IV. New Business
- V. Committee Reports
  - a. Governance
  - b. Elder Abuse and Financial Exploitation
  - c. Transportation
  - d. Education and Employment
  - e. Housing
  - f. Information and Education
  - g. Health and Wellness
  - h.
- VI. Ward Reports
- VII. Public Comment
- VIII. Announcements
- IX. Adjournment

**District of Columbia Commission on Aging  
Meeting Minutes for  
Wednesday, November 20, 2019**

**Attendance**

**Commissioners:** Guleford Bobo, Chairman; Vice Chair Carolyn Matthews, Nancy Miranda, Barbara Hair, Jo Anne Hersh, Barbara Lee, Grace Lewis, Mary Taylor, Barbara Hair, Charles Hicks, Gloria J. Whitfield

**Ex-Officio Members:** David Quick (DCPL); Vivian Guerra (DDOT); Hector Rodriguez (DC Council)

**Members of the Public:** MacKenzie Matthews (DOEE), Joelle Purdy (Washington Home)

**Department of Aging and Community Living (DACL) Staff Present:** Laura Newland, Director; Tanya Reid, Administrative Support Manager,

**I. Call to Order**

Guleford Bobo (Chairman) called the meeting to order at 1:11 pm with a moment of silence.

**II. Review and Approval of Minutes**

The meeting minutes from the Commission's October 23<sup>rd</sup> meeting were reviewed and approved with correction. Vivian Guerra from DDOT corrected that the 5<sup>th</sup> paragraph of the dockless scooter section should state mis-parked scooters should be picked up within two hours not two days, and residents can call 311 for a service request and email dockless.mobility@dc.gov.

**III. Presentation(s)**

**a. Department of Aging and Community Living Update**

Administrative Support Manager Tanya Reid announced the Mayor's Annual Holiday is on December 19<sup>th</sup> at the DC Armory, DACL's Performance hearing is currently scheduled for February 25<sup>th</sup> and the Budget Hearing is scheduled for April 3<sup>rd</sup>. She encouraged the Commissioners to begin thinking about what Chairman Bobo and Vice Chairwoman Matthews should include in the Commissions testimony.

Commissioner Hicks stressed the importance of the hearings.

**b. Lead Pipe Replacement Assistance Program (LPRAP)**

Program Lead for the DC Department of Energy and Environment (DOEE) Lead Pipe Replacement Assistance Program, Mackenzie Matthews, discussed LPRAP. The program is through the Affordability and Efficiency division of

DOEE, the same division that does utility discounts and is responsible for LIHEAP. The program is considered an assistance program because DOEE can help fund lead pipe replacement for residents.

In FY 20, Mayor Bowser set aside \$2.8 million to address the District's lead pipe issues. \$1 million was set aside for when DC Water is doing capital improvements or emergency repairs and the surrounding houses need full lead replacements. Residents do not have to apply but they do have to agree to the replacement. DC Water can replace the lines in the street and the property at no cost to the owner; however, if a resident wants their lines changed outside of capital improvement or emergency repairs, they will have to pay for the cost.

The remaining \$1.8 million goes to properties with a partial lead pipe replacement. A partial lead pipe replacement means that a property has a completely lead line connecting the property to line in the street, and DC Water changed the line in the street to something other than lead. This mixed material increases the chance of lead entering the property. If the property has a partial lead line, the owner can receive 50% of the cost of replacement up to \$2,500. Additionally, some residents depending on household size and income receive 80% - 100% assistance.

Residents who received a mailer about the program from DC Water, received it because it is believed that the property is eligible. Residents can visit [dcwater.com/leadmap](http://dcwater.com/leadmap) to view the pipes under their property and see if their property is eligible. The map is not always accurate, but residence can call to identify discrepancies.

Residents can complete the application online or submit a paper application. In addition to the application, applicants will need to submit a photo ID, proof of property ownership, proof of income is optional (those owner's will only be considered to receive assistance with 50% of cost), a recent DC Water bill, quote for the replacement of the lead pipe. The quote comes from a contractor of the homeowner's choosing.

After the application is received it goes through two simultaneous stages of review. DOEE will review the application for income verification and application completeness. If anything is missing or illegible, DOEE will reach out to retrieve the needed information. DC Water will review the quote to ensure the quote makes sense for the property. If DC Water has questions, they will contact the resident. Once fully approved, the resident, contractor, and DC Water will receive the same benefit confirmation letter. The letter will outline the amount the District will pay and next steps for the homeowner and the contractor.

Commissioner Hicks asked if DOEE can recommend contractors. Ms. McKenzie stated that the legislation allows for DC Water to give out a list of contractors; however, currently does not exist.

Vice Chairwoman Matthews indicated that the process is difficult and asked about seniors who need assistance with the process. Ms. McKenzie indicated that communication and flexibility for anyone having difficulty with the application. The resident can call her for assistance. Home visits have been done for other programs to help with application or to verify if denials were appropriate.

Chairman Bobo asked if it was the homeowner's income or the household. Ms. McKenzie said it was the household's income.

Commissioner Miranda asked when the money was released, how much has been used, and after it has been used will it be renewed. Ms. McKenzie stated Mayor Bowser signed the legislation and it became effective in March 2019 and the money was released on October 1, 2019. For the \$1.8 million, four households have been approved the partial replacements, she did not know the amount. For the \$1 million capital improvements, a project that was completed on Franklin Street allowed 33 households to receive complete lead pipe replacement at zero cost to them.

Commissioners Hicks and Hersh asked about safeguards against scammers. Ms. McKenzie stated one safeguard is DC Water reviewing the quotes, DCRA also comes out to check the work after it is completed. She also encouraged the Commission to come to the hearing on December 10<sup>th</sup> to put the concerns on record.

#### **IV. New Business**

#### **V. Committee Report**

Governance: None

Transportation: None

Housing: None

Health and Wellness: Chairman Bobo has been encouraging people to attend the wellness centers; however, some people are encountering bullying issues.

Information and Education: None

## **VI. Ward Report**

Ward 1: Chairman Bobo announced that the senior Thanksgiving luncheon will be on November 25<sup>th</sup>. Commissioner Miranda met with Peter Rankin of AARP, he asked for assistance getting information to seniors. Also, Martha Ramirez would like to have a roundtable with the Commission to discuss how to ease Medicaid enrollment.

Ward 7: Chairman Bobo announced the Thanksgiving luncheon will be November 21<sup>st</sup>.

## **VII. Announcements**

Chairman Bobo announced AARP had a forum on November 19<sup>th</sup> for senior apartment dwellers to bring their taxes from the past three years to get tax credits for housing. Vice Chairwoman Matthews stated that falls under Schedule H. The first time, residents can back 3 years.

Chairman Bobo reminded the Commission that the primary objective for the first quarter was housing. He encouraged the Commissioners to look at the website [www.rootstorooftdc.com](http://www.rootstorooftdc.com) to a list of housing programs available. Commissioner Miranda liked the website, it was clear and easy to read. Ms. McKenzie also informed the Commission about an initiative through the LAB in the City Administrator's office called Front Door.

Vice Chairwoman Matthews stated a lot of the information about the programs are made available to the public, but sometimes it can be intimidating. She indicated something like a directory would be helpful. Commissioner Hicks agreed and thought churches may be a good way to reach people. Chairman Bobo stated DACL's Alice Thompson goes out to churches and has fairs, but it generally on Saturdays. Hector Rodriguez liked the idea of a housing directory that indicates what the program is, who is in charge, etc., and he volunteered to take the information back to Councilmember Bonds.

Mr. Rodriguez also announced that Councilmember Bonds introduced a bill to extend rent control. One hundred-thirty-one people signed up for the hearings. The bill is currently in committee for markup. The extension is from 2020 to 2030. Chairman Bobo asked what the cap was for seniors. Mr. Rodriguez said he'd have to get that information for him. Commissioner Hair stated tenants needed programs to teach them how to pay rent, how to take care of the property, etc. She believes most programs benefit the tenants but not many for the landlords.

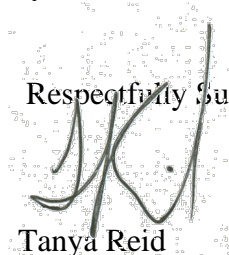
Vivian Guerra announced that DDOT is having open houses through the city to share information on safety, transportation and transportation planning projects. The next one will be December 7<sup>th</sup> in Ward 4.

**VIII. Adjournment**

The meeting was adjourned at 2:56 pm.

These minutes were recorded by Tanya Reid, Administrative Support Manager, DC Department of Aging and Community Living, and were formally approved by the Commission on Aging on January 22, 2020.

Respectfully Submitted,

A handwritten signature in black ink, appearing to read 'TR', is placed over a circular, dotted watermark or seal.

Tanya Reid  
Administrative Support Manager  
DC Department of Aging and Community Living

**D.C. Commission on Aging**  
**Wednesday, January 22, 2020**  
**10:00 a.m.**  
**AGENDA**

- I. Call to Order
- II. Review and Approval of Minutes Commissioners
- III. Presentations
  - a. D.C. Office on Aging Update Laura Newland  
Director
- IV. New Business
  - a. Testimony for Oversight Hearing
- V. Committee Reports
  - a. Governance b. Elder Abuse and Financial Exploitation
  - c. Transportation d. Education and Employment
  - e. Housing f. Information and Education
  - g. Health and Wellness h.
- VI. Ward Reports
- VII. Public Comment
- VIII. Announcements
- IX. Adjournment



## Utilization of various services

AGENCY	SERVICE	FY 2019
Behrend-Adas Senior Fellowship Program	Congregate Meals - Weekdays	4,294
Downtown Clusters Geriatric Day Care Center	Case Management	44
	Comprehensive Assessment	16
	Counseling	22
	Extended Geriatric Day Care	1,078
	Geriatric Day Care	33,647
	Health Promotion	28
	Respite Care under Title III E	144
East River Family Strengthening Ward 7	Case Management	3,488
	Comprehensive Assessment	684
	Congregate Meals - Weekdays	23,935
	Congregate Meals - Weekend	5,328
	Counseling	8,275
	Health Promotion	24,153
	Home Delivered Meals - Weekdays	160,963
	Home Delivered Meals - Weekend	24,005
	Nutrition Counseling	198
	Nutrition Education	1,464
	Recreation/ Socialization	59,689
	Disease Prevention	1,668
	Heavy House Cleaning	1,617
	Nutrition Supplements	58
	Respite Care under Title III E	542
	Wellness	69,998
East River Family Strengthening Ward 8	Case Management	1,784
	Comprehensive Assessment	427
	Congregate Meals - Weekdays	37,872
	Counseling	11,022
	Health Promotion	14,055
	Home Delivered Meals - Weekdays	105,010
	Home Delivered Meals - Weekend	27,960
	Nutrition Counseling	804
	Nutrition Education	2,358
	Recreation/ Socialization	44,939
	Disease Prevention	1,775
	Nutrition Supplements	285
	Respite Care under Title III E	838
	Wellness	80,044
First Baptist Senior Center	Counseling	10,335

## Utilization of various services

AGENCY	SERVICE	FY 2019
First Baptist Senior Center	Health Promotion	6,171
	Recreation/ Socialization	20,757
	Transportation to Activities	981
Hattie Holmes Senior Wellness Center	Counseling	158
	Group Counseling	20
	Disease Prevention	3,384
	Wellness	95,031
Home Care Partners	Homemaker	86,271
	Respite Care under Title III E	1,446
	Supplemental Services under Title III E	5
Howard University Hayes Senior Wellness Center	Disease Prevention	517
	Wellness	41,301
IONA Alzheimer's Initiative	CGV Training	36
	Club Memory (Check In)	806
	Club Memory Program	7,695
	Dementia Navigators (Care Coordination)	1,121
	Dementia Navigators (Counseling/Resource Ref..)	519
	Dementia Program	141
	Money Management Program (Home visits & ot..)	1,276
	Money Management Program (Rep Payee Servic..)	475
	Saturday Respite	8,448
IONA Senior Services Ward 3	Case Management	4,854
	Comprehensive Assessment	227
	Congregate Meals - Weekdays	9,033
	Counseling	2,732
	Geriatric Day Care	9,471
	Health Promotion	5,055
	Home Delivered Meals - Weekdays	36,945
	Home Delivered Meals - Weekend	13,120
	Nutrition Counseling	452
	Nutrition Education	1,034
	Recreation/ Socialization	8,224
	Transportation of Home Meals	4,566
	Elder Abuse Prevention Initiative	49
	Nutrition Supplements	483
	Satellite Wellness	7,060
	Silver Circles	362
Kingdom Care Senior Village	Activities/Entertainment	201
	Grocery Purchases	81

## Utilization of various services

AGENCY	SERVICE	FY 2019
Kingdom Care Senior Village	Workshops/Seminars	171
Mary's Center Bernice Fontenau Senior Wellness Center	Counseling	5
	Group Counseling	227
	Disease Prevention	2,444
	Wellness	71,781
Seabury Resources for Aging Ward 5	CareGiver Case Management	316
	Case Management	3,430
	Comprehensive Assessment	1,018
	Congregate Meals - Weekdays	79,090
	Counseling	5,797
	Health Promotion	49,132
	Home Delivered Meals - Weekdays	80,250
	Home Delivered Meals - Weekend	36,122
	Nutrition Counseling	798
	Nutrition Education	9,159
	Recreation/ Socialization	110,803
	Disease Prevention	72
	Nutrition Supplements	384
	Wellness	85,203
Seabury Resources for Aging Ward 6	Case Management	2,830
	Comprehensive Assessment	141
	Congregate Meals - Weekdays	27,951
	Counseling	5,258
	Health Promotion	10,528
	Home Delivered Meals - Weekdays	67,305
	Home Delivered Meals - Weekend	13,589
	Nutrition Counseling	342
	Nutrition Education	3,509
	Recreation/ Socialization	46,757
	Nutrition Supplements	136
Seabury Senior Connector Transportation Services	Transportation of Home Meals	72,076
	Transportation to Activities	184,632
SOME Senior Services	Case Management	1,519
	Counseling	4,745
	Health Promotion	5,227
	Recreation/ Socialization	11,888
	24 Hour Emergency Housing	5
	Assessments	374
	Homebound Case Mgt	319

## Utilization of various services

AGENCY	SERVICE	FY 2019
SOME Senior Services	Homebound Counseling	2,325
Terrific, Inc. Ward 1	CareGiver Case Management	364
	Case Management	1,807
	Comprehensive Assessment	411
	Congregate Meals - Weekdays	46,862
	Counseling	10,840
	Health Promotion	16,051
	Home Delivered Meals - Weekdays	54,248
	Home Delivered Meals - Weekend	5,937
	Nutrition Counseling	261
	Nutrition Education	1,374
	Recreation/ Socialization	41,728
	Comprehensive Assessment under Title III E	44
	Nutrition Supplements	243
	Terrific, Inc. Ward 2	CareGiver Case Management
Case Management		1,458
Comprehensive Assessment		326
Congregate Meals - Weekdays		49,861
Counseling		24,302
Health Promotion		39,750
Home Delivered Meals - Weekdays		32,446
Home Delivered Meals - Weekend		15,231
Nutrition Counseling		150
Nutrition Education		565
Recreation/ Socialization		47,952
Nutrition Supplements		173
Respite Care under Title III E		3
Terrific, Inc. Ward 4		CareGiver Case Management
	Case Management	1,346
	Comprehensive Assessment	413
	Congregate Meals - Weekdays	27,305
	Counseling	10,832
	Health Promotion	10,424
	Home Delivered Meals - Weekdays	61,001
	Home Delivered Meals - Weekend	16,806
	Nutrition Counseling	307
	Nutrition Education	2,402
	Recreation/ Socialization	20,570
	CGVCounseling	3

## Utilization of various services

AGENCY	SERVICE	FY 2019
Terrific, Inc. Ward 4	Comprehensive Assessment under Title III E	50
	Nutrition Supplements	688
Univ.of the District of Columbia Institute of Gerontology	Bodywise	4,974
	Food Handlers	20
	In Home Helpers	4
	UDC Respite services	10,136
Vida Senior Centers	Counseling	16,295
	Health Promotion	8,693
	Nutrition Counseling	975
	Nutrition Education	1,373
	Recreation/ Socialization	49,799
Yellow Cab Company of DC (YCDC)	Transportaion and Escort	64,240
Zion/Genevieve Johnson Senior Center	Case Management	503
	Comprehensive Assessment	79
	Counseling	4,659
	Geriatric Day Care	11,630
	Health Promotion	4,458
	Recreation/ Socialization	1,771

## Total utilization of services

SERVICE	FY 2019
24 Hour Emergency Housing	5
Activities/Entertainment	201
Assessments	374
Bodywise	4,974
CGV Training	36
CGVCounseling	3
CareGiver Case Management	925
Case Management	23,062
Club Memory (Check In)	806
Club Memory Program	7,695
Comprehensive Assessment	3,740
Comprehensive Assessment under Title III E	94
Congregate Meals - Weekdays	306,203
Congregate Meals - Weekend	5,328
Counseling	115,274
Dementia Navigators (Care Coordination)	1,121
Dementia Navigators (Counseling/Resource Referral)	519
Dementia Program	141
Disease Prevention	9,859
Elder Abuse Prevention Initiative	49
Extended Geriatric Day Care	1,078
Food Handlers	20
Geriatric Day Care	54,748
Grocery Purchases	81
Group Counseling	247
Health Promotion	193,724
Heavy House Cleaning	1,617
Home Delivered Meals - Weekdays	598,168
Home Delivered Meals - Weekend	152,769
Homebound Case Mgt	319
Homebound Counseling	2,325
Homemaker	86,271
In Home Helpers	4
Money Management Program (Home visits & other client support)	1,276
Money Management Program (Rep Payee Service)	475
Nutrition Counseling	4,285
Nutrition Education	23,237
Nutrition Supplements	2,449
Recreation/ Socialization	464,877

## Total utilization of services

SERVICE	FY 2019
Respite Care under Title III E	2,973
Satellite Wellness	7,060
Saturday Respite	8,448
Silver Circles	362
Supplemental Services under Title III E	5
Transportation and Escort	64,240
Transportation of Home Meals	76,642
Transportation to Activities	185,613
UDC Respite services	10,136
Wellness	443,358
Workshops/Seminars	171

## Utilization of various services

AGENCY	SERVICE	FY 2020
		Q1
Behrend-Adas Senior Fellowship Program	Congregate Meals - Weekdays	729
Downtown Clusters Geriatric Day Care Center	Case Management	6
	Counseling	1
	Extended Geriatric Day Care	164
	Geriatric Day Care	7,964
	Health Promotion	29
East River Family Strengthening Ward 7	Case Management	634
	Comprehensive Assessment	111
	Congregate Meals - Weekdays	5,104
	Congregate Meals - Weekend	1,169
	Counseling	1,309
	Health Promotion	5,955
	Home Delivered Meals - Weekdays	40,243
	Home Delivered Meals - Weekend	6,625
	Nutrition Counseling	9
	Nutrition Education	240
	Recreation/ Socialization	9,727
	Disease Prevention	474
	Heavy House Cleaning	235
	Respite Care under Title III E	48
	Wellness	11,103
East River Family Strengthening Ward 8	Case Management	534
	Comprehensive Assessment	80
	Congregate Meals - Weekdays	8,170
	Counseling	2,769
	Health Promotion	3,277
	Home Delivered Meals - Weekdays	27,097
	Home Delivered Meals - Weekend	8,714
	Nutrition Counseling	113
	Nutrition Education	713
	Recreation/ Socialization	7,489
	Disease Prevention	313
	Nutrition Supplements	88
	Wellness	15,999
First Baptist Senior Center	Counseling	2,793
	Health Promotion	1,645
	Recreation/ Socialization	5,279
Hattie Holmes Senior Wellness Center	Counseling	68



## Utilization of various services

AGENCY	SERVICE	FY 2020
		Q1
Hattie Holmes Senior Wellness Center	Group Counseling	13
	Disease Prevention	557
	Wellness	18,290
Home Care Partners	CareGiver Case Management	62
	Homemaker	20,458
	Respite Care under Title III E	3,158
	Supplemental Services under Title III E	747
Howard University Hayes Senior Wellness Center	Wellness	10,072
IONA Alzheimer's Initiative	Club Memory (Check In)	398
	Club Memory Program	1,675
	Dementia Navigators (Care Coordination)	297
	Dementia Navigators (Counseling/Resource Ref..)	199
	Dementia Program	51
	Money Management Program (Home visits & ot..)	336
	Money Management Program (Rep Payee Servic..)	162
IONA Senior Services Ward 3	Case Management	1,168
	Comprehensive Assessment	36
	Congregate Meals - Weekdays	2,165
	Counseling	742
	Geriatric Day Care	2,231
	Health Promotion	1,275
	Home Delivered Meals - Weekdays	8,485
	Home Delivered Meals - Weekend	3,512
	Nutrition Counseling	52
	Nutrition Education	296
	Recreation/ Socialization	2,116
	Transportation of Home Meals	1,245
	Elder Abuse Prevention Initiative	5
	Nutrition Supplements	141
	Satellite Wellness	1,857
	Silver Circles	134
Mary's Center Bernice Fontenau Senior Wellness Center	Group Counseling	197
	Disease Prevention	201
	Wellness	13,221
Seabury Resources for Aging Ward 5	CareGiver Case Management	159
	Case Management	747
	Comprehensive Assessment	341
	Congregate Meals - Weekdays	17,020

## Utilization of various services

AGENCY	SERVICE	FY 2020
		Q1
Seabury Resources for Aging Ward 5	Counseling	1,620
	Health Promotion	13,744
	Home Delivered Meals - Weekdays	26,566
	Home Delivered Meals - Weekend	8,598
	Nutrition Counseling	456
	Nutrition Education	1,131
	Recreation/ Socialization	22,108
	Nutrition Supplements	100
	Wellness	13,357
Seabury Resources for Aging Ward 6	Case Management	593
	Comprehensive Assessment	29
	Congregate Meals - Weekdays	6,406
	Counseling	1,696
	Health Promotion	2,438
	Home Delivered Meals - Weekdays	17,258
	Home Delivered Meals - Weekend	3,517
	Nutrition Counseling	88
	Nutrition Education	864
	Recreation/ Socialization	10,238
	Nutrition Supplements	34
Seabury Senior Connector Transportation Services	Transportation of Home Meals	17,020
	Transportation to Activities	46,324
SOME Senior Services	Counseling	1,412
	Health Promotion	1,485
	Recreation/ Socialization	3,625
	24 Hour Emergency Housing	7
	Homebound Case Mgt	199
	Homebound Counseling	765
Terrific, Inc. Ward 1	CareGiver Case Management	144
	Case Management	355
	Comprehensive Assessment	137
	Congregate Meals - Weekdays	10,685
	Counseling	4,957
	Health Promotion	4,943
	Home Delivered Meals - Weekdays	11,665
	Home Delivered Meals - Weekend	2,521
	Nutrition Counseling	57
Nutrition Education	462	

## Utilization of various services

AGENCY	SERVICE	FY 2020
		Q1
Terrific, Inc. Ward 1	Recreation/ Socialization	9,474
	Comprehensive Assessment under Title III E	11
	Nutrition Supplements	110
Terrific, Inc. Ward 2	CareGiver Case Management	35
	Case Management	422
	Comprehensive Assessment	88
	Congregate Meals - Weekdays	12,547
	Counseling	11,587
	Health Promotion	16,702
	Home Delivered Meals - Weekdays	7,851
	Home Delivered Meals - Weekend	3,417
	Nutrition Counseling	74
	Nutrition Education	1,218
	Recreation/ Socialization	26,853
	Comprehensive Assessment under Title III E	3
	Nutrition Supplements	124
Terrific, Inc. Ward 4	CareGiver Case Management	56
	Case Management	376
	Comprehensive Assessment	122
	Congregate Meals - Weekdays	7,389
	Counseling	3,958
	Health Promotion	3,939
	Home Delivered Meals - Weekdays	14,823
	Home Delivered Meals - Weekend	3,935
	Nutrition Counseling	106
	Nutrition Education	538
	Recreation/ Socialization	7,878
	Comprehensive Assessment under Title III E	9
	Nutrition Supplements	146
Univ.of the District of Columbia Institute of Gerontology	Bodywise	971
	UDC Respite services	3,301
Vida Senior Centers	Counseling	3,376
	Health Promotion	2,271
	Nutrition Counseling	171
	Nutrition Education	730
	Recreation/ Socialization	22,451
Yellow Cab Company of DC (YCDC)	Transportaion and Escort	13,379
Zion/Genevieve Johnson Senior Center	Case Management	117

## Utilization of various services

		FY 2020
AGENCY	SERVICE	Q1
Zion/Genevieve Johnson Senior Center	Comprehensive Assessment	8
	Counseling	1,334
	Geriatric Day Care	3,509
	Health Promotion	1,287
	Recreation/ Socialization	376

## Total utilization of services

SERVICE	FY 2020
	Q1
24 Hour Emergency Housing	7
Bodywise	971
CareGiver Case Management	455
Case Management	4,951
Club Memory (Check In)	398
Club Memory Program	1,675
Comprehensive Assessment	950
Comprehensive Assessment under Title III E	23
Congregate Meals - Weekdays	70,215
Congregate Meals - Weekend	1,169
Counseling	37,618
Dementia Navigators (Care Coordination)	297
Dementia Navigators (Counseling/Resource Referral)	199
Dementia Program	51
Disease Prevention	1,545
Elder Abuse Prevention Initiative	5
Extended Geriatric Day Care	164
Geriatric Day Care	13,704
Group Counseling	210
Health Promotion	58,989
Heavy House Cleaning	235
Home Delivered Meals - Weekdays	153,988
Home Delivered Meals - Weekend	40,839
Homebound Case Mgt	199
Homebound Counseling	765
Homemaker	20,458
Money Management Program (Home visits & other client support)	336
Money Management Program (Rep Payee Service)	162
Nutrition Counseling	1,125
Nutrition Education	6,192
Nutrition Supplements	743
Recreation/ Socialization	127,613
Respite Care under Title III E	3,206
Satellite Wellness	1,857
Silver Circles	134
Supplemental Services under Title III E	747
Transportation and Escort	13,379
Transportation of Home Meals	18,265

## Total utilization of services

SERVICE	FY 2020
	Q1
Transportation to Activities	46,324
UDC Respite services	3,301
Wellness	82,042

## DC Department of Aging and Community Living Community Dining Sites by Ward

Ward 1	Location	Phone	Site Type
Paul Lawrence Dunbar	2001 15th St, NW Washington, D.C. 20009	202-939-9035	Senior Housing
Columbia Heights	2900 14th St, NW Washington, D.C. 20009	202-939-9034	Senior Housing
Vida Senior Center	1842 Calvert St, NW Washington, D.C. 20009	202-483-1508	Senior Center
Garfield Terrace	2301 11th St, NW Washington, D.C. 20001	202-939-9038	Senior Housing
Harvard Towers	1845 Harvard St, NW Washington, D.C. 20009	202-939-9005	Senior Housing
Bernice Fonteneau Wellness Center	3531 Georgia Ave, NW Washington, D.C. 20010	202-727-0338	DACL Senior Wellness Center

Ward 2	Location	Phone	Site Type
Asian Pacific Islander Senior Services Center	417 G Place, NW Washington, D.C. 20001	202-842-4376	Faith-Based
Asbury Methodist Church/ Downtown Cluster's Day Care	926 11th St, NW Washington, D.C. 20001	202-347-7527	Faith-Based
Claridge Towers	1221 M St, NW Washington, D.C. 20005	202-682-9395	Senior Housing
James Apartment Building	1425 N St, NW Washington, D.C. 20005	202-673-4460	Senior Housing
St. Mary's Court	725 24th St, NW Washington, D.C. 20037	202-223-5712	Senior Housing
Oasis Senior Center for the Homeless	1226 Vermont Ave, NW Washington, D.C. 20005	202-265-2017	Faith-Based

Ward 3	Location	Phone	Site Type
Adas Israel	2850 Quebec St, NW Washington, D.C. 20008	202-363-7530	Faith-Based
St. Albans Episcopal Church	3001 Wisconsin Ave, NW Washington, D.C. 20016	202-895-9448	Faith-Based
Wellness & Arts Center	4125 Albermarle St, NW Washington, D.C. 20016	202-895-0238	Senior Center

Ward 4	Location	Phone	Site Type
Colony House	930 Farragut St, NW Washington, D.C. 20011	202-882-3881	Senior Housing
First Baptist Senior Center	715 Randolph St, NW Washington, D.C. 20011	202-723-4313	Faith-Based
Ft. Stevens Recreations Center	1327 Van Buren St, NW Washington, D.C. 20012	202-576-6916	DCPR
Genevieve Johnson Day Care	4817 Blagden Ave, NW Washington, D.C. 20011	202-723-8537	Faith-Based
Hattie Holmes Senior Wellness Center	324 Kennedy St, NW Washington, D.C. 20011	202-291-6170	DACL Senior Wellness Center
Lamond Recreation Center	20 Tuckerman St, NW Washington, D.C. 20011	202-576-9541	DCPR
Vida Brightwood	1330 Missouri Ave, NW Washington, D.C. 20011	202-483-5800	Senior Housing
Zion Hill	4007 9th St, NW Washington, D.C. 20011	202-722-1580	Faith-Based

Ward 5	Location	Phone	Site Type
Blind and Visually Impaired Senior Center	2900 Newton St, NE Washington, D.C. 20018	202-529-8701 x219 or x207	Private Building
Delta Towers	1400 Florida Ave, NE Washington, D.C. 20002	202-398-1303	Public Housing
Edgewood Terrace Apartments	635 Edgewood St, NE Washington, D.C. 20017	202-529-0310	Public Housing
Ft. Lincoln 1 Senior Nutrition Site	3400 Banneker Dr, NE Washington, D.C. 20018	202-635-2392	Senior Housing
Petersburg Senior Village III	3298 Ft. Lincoln Dr, NE Washington, D.C. 20018	202-269-4530	Senior Housing
Green Valley Apartments	2412 Franklin St, NE Washington, D.C. 20018	202-635-0286	Public Housing
Model Cities Senior Wellness Center	1901 Evarts St, NE Washington, D.C. 20018	202-635-1900	DACL Senior Wellness Center
Kibar Halal Nutrition Center	1519 Islamic Way, NW Washington, D.C. 20001	202-483-8832	Faith-Based
Vicksburg - Senior Village II	3005 Bladensburg Rd, NE Washington, D.C. 20018	202-529-7731	Senior Housing
North Capitol at Plymouth	5233 North Capitol St, NE Washington, D.C. 20011	202-541-1222	Senior Housing

Ward 6	Location	Phone	Site Type
Asbury Dwelling	1616 Marion St, NW Washington, D.C. 20001	202-745-7434	Senior Housing
Greenleaf Senior Building	1200 Delaware Ave, SW Washington, D.C. 20024	202-554-3100	Public Housing
Sibley Plaza	1140 North Capitol St, NW Washington, D.C. 20002	202-408-4700	Public Housing
Hayes Senior Wellness Center	500 K St, NE Washington, D.C. 20002	202-727-0355	DACL Senior Wellness Center

Ward 7	Location	Phone	Site Type
Kenilworth Recreation Center	1300 44th St, NE Washington, D.C. 20019	202-258-6513	DCPR
Phillip T Johnson Senior Center	3440 Minnesota Ave, SE Washington, D.C. 20020	202-584-4431	Faith-Based
Washington Senior Wellness Center	3001 Alabama Ave, SE Washington, D.C. 20020	202-581-9355	DACL Senior Wellness Center
Mayfair Mansion	3744 1/2 Hayes St, NE Washington, D.C. 20019	202-534-4880	Private Building

Ward 8	Location	Phone	Site Type
Claiborne House, Washington, D.C. Matthews Memorial Church	2616 Martin Luther King Jr. Ave, SE Washington, D.C. 20020	202-610-0961	Faith-Based
Congress Heights Senior Wellness Center	3500 Martin Luther King Jr. Ave, SE Washington, D.C. 20032	202-563-7225	DACL Senior Wellness Center
Deaf and Hard of Hearing	3700 9th St, SE Washington, D.C. 20032	202-562-6860	Senior Housing
Knox Hill Apartments	2700 Jasper St, SE Washington, D.C. 20020	202-610-0782	Senior Housing
SOME's Kuehner Place Senior Center	1667 Good Hope Rd, SE Washington, D.C. 20020	202-797-8806 x1301 or x1305	Senior Center



**D.C. OFFICE ON AGING  
Attachment Q73 – Grantee Quarterly Scorecards in FY19 for Edlavitch DC JCC  
PROGRAM AND GRANTS MONITORING CHECKLIST**

Grantee Name: Edlavitch DC JCC  
 Grant Title: Behrend Adas Senior Fellowship  
 Grantee Address: 0  
 Grant Monitor Name: Linda Irizarry

Grant Period: FY 19 10/01/18 -09/30/19  
 Total Grant Amount: 57454  
 Local/District Grant Amount: 57464  
 Federal Grant Amount: 0

Date of visit: \_\_\_\_\_  
 Total Score for the visit: 0 / 100  
 Grantee #: 0  
 PO#: 0

**Presite form:** Please fill in data each month while processing MI's and Unit Invoices, and reviewing CURT and Quarterly reports. This form will then be used as a required tool for quarterly site visits in order to assist in observing the complete quarterly performance.

**Compliance with Reporting Requirement:**

Unit Invoice  
 M1  
 CURT (page 40)  
 Q & Y (page 59)

July				August				September			
Due Date	Initial Date Received	Final Date Received	Days Past Due	Due Date	Initial Date Received	Final Date Received	Days Past Due	Due Date	Initial Date Received	Final Date Received	Days Past Due
August 15, 2019				September 14, 2019				October 5, 2019			
August 21, 2019	August 14, 2019	August 14, 2019	-7	September 20, 2019	September 26, 2019	October 2, 2019	12	October 5, 2019	October 24, 2019	October 24, 2019	19
August 31, 2019	August 22, 2019	August 22, 2019	-9	September 28, 2019	September 25, 2019	September 25, 2019	-3	October 9, 2019	October 24, 2019	October 24, 2019	15
								October 9, 2019	October 28, 2019	October 28, 2019	19

**Finance and Budget Management:**

Local/District Funds	FY18 NGA Amount	YTD PASS Receipt	YTD Burn Rate	July			August			September			QUARTER 4	
				PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Average Burn Rate
Other Directs	\$57,454.00	\$54,637.45	95.1%	\$5,332.72	\$9,274.55	9.3%	\$5,693.00	\$3,581.55	9.9%	\$765.00	\$2,816.55	1.3%	\$11,790.72	6.8%
#REF!	#REF!	#REF!	0.0%	#REF!	#REF!	0.0%	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	0.0%
#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!
#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	0.0%	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	0.0%
#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!
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#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!
#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!
#REF!	\$54,637.45	#REF!	#REF!	\$5,332.72	#REF!	#REF!	\$5,693.00	#REF!	#REF!	\$765.00	#REF!	#REF!	\$11,790.72	#REF!
<b>Federal Funds</b>	<b>FY18 NGA Amount</b>	<b>YTD PASS Receipt</b>	<b>YTD Burn Rate</b>	<b>PASS Receipt</b>	<b>Balance</b>	<b>Burn Rate</b>	<b>PASS Receipt</b>	<b>Balance</b>	<b>Burn Rate</b>	<b>PASS Receipt</b>	<b>Balance</b>	<b>Burn Rate</b>	<b>PASS Receipt</b>	<b>Average Burn Rate</b>
Counseling Title IIIB	\$0.00	\$0.00	#DIV/0!		\$0.00			\$0.00			\$0.00			
Caregiver Case Mgmt Title IIIE	\$0.00	\$0.00	#DIV/0!		\$0.00			\$0.00			\$0.00			
Elder Abuse Title VII	\$0.00	\$0.00	#DIV/0!		\$0.00			\$0.00			\$0.00			
	\$0.00	#DIV/0!	#DIV/0!	\$ -	\$0.00	#DIV/0!	\$ -	\$0.00	#DIV/0!	\$ -	\$0.00	#DIV/0!	\$ -	
<b>Total</b>	<b>#REF!</b>	<b>#DIV/0!</b>	<b>#DIV/0!</b>	<b>\$5,332.72</b>	<b>#REF!</b>	<b>#DIV/0!</b>	<b>\$5,693.00</b>	<b>#REF!</b>	<b>#DIV/0!</b>	<b>\$765.00</b>	<b>#REF!</b>	<b>#DIV/0!</b>	<b>\$11,790.72</b>	

**Program and Performance Progress:**

Performance Objective	YTD Reported	YTD Progress Rate	July			August			September			QUARTER 4		
			Reported	Balance	Progress Rate	Reported	Balance	Progress Rate	Reported	Balance	Progress Rate	Reported	Average Progress Rate	
Number of meals served	6,900	6,896	100%	578	4,513	8.4%	461	4,052	6.7%	446	3,606	6.5%	1,485	7.2%
Number of seniors served	150	915	610%	70	-624	46.7%	62	-686	41.3%	79	-765	52.7%	211	46.9%
Number of calendars distributed	1,000	1,200	120%	100	0	10.0%	100	-100	10.0%	100	-200	10.0%	300	10.0%
Number of activities	425	446	105%	38	56	8.9%	44	12	10.4%	33	-21	7.8%	115	9.0%
Number of volunteers	30	169	563%	17	-104	56.7%	17	-121	56.7%	18	-139	60.0%	52	57.8%
#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!	#REF!
0	0	0	#DIV/0!	0	0	0	0	0	0	0	0	0	0	0
0	0	0	#DIV/0!	0	0	0	0	0	0	0	0	0	0	0
0	0	0	#DIV/0!	0	0	0	0	0	0	0	0	0	0	0
0	0	0	#DIV/0!	0	0	0	0	0	0	0	0	0	0	0
0	0	0	#DIV/0!	0	0	0	0	0	0	0	0	0	0	0
0	0	0	#DIV/0!	0	0	0	0	0	0	0	0	0	0	0
0	0	0	0%	0	0	0	0	0	0	0	0	0	0	0

List of issues to address during the site visit: list issues that came up during the quarter, outlined in the CURT report, and important trends observed in the table above.

*Site Visit Notes on Compliance with Reporting Requirements:*

*Site Visit Notes on Finance and Budget Management:*

*Site Visit Notes on Program and Performance Progress*

<b>Finding:</b>	<b>Finding:</b>	<b>Finding:</b>
<b>Corrective Actions Planned:</b>	<b>Corrective Action Planned:</b>	<b>Corrective Actions Planned:</b>

**Score Card**

	Assigned Weight	Raw Score (Points)		
Reporting	20%	13	7	Average Day Reports submitted past due date
Budget & Finance	30%	30		Average Burn Rate
Program Progress	30%	0	0.0%	Average Progress Rate
Site Visit	20%	0	0%	Total Site Visit Score

Total Score (Points):  /100

**Final Notes:** *Please write your overall evaluation of the site visit*

**Findings:**

Average days past due date	REPORTING		BUDGET		PROGRAM		SITE VISIT	
	Score (1 point = 1 day)	Average Monthly Burn Rate	Score (1 point = 0.27%)	Average rate of obtaining objective/Progress Rate	Score (1 point = 0.27%)	Average Monthly Burn Rate	Score (1 point = 2%)	
0	20	8.33%	30	8.33%	30	100%	20	
1	19	8.05	29	8.05	29	98%	19	
2	18	7.77	28	7.77	28	96%	18	
3	17	7.50	27	7.50	27	94%	17	
4	16	7.22	26	7.22	26	92%	16	
5	15	6.94	25	6.94	25	90%	15	
6	14	6.66	24	6.66	24	88%	14	
7	13	6.39	23	6.39	23	86%	13	
8	12	6.11	22	6.11	22	84%	12	
9	11	5.83	21	5.83	21	82%	11	
10	10	5.55	20	5.55	20	80%	10	
11	9	5.28	19	5.28	19	78%	9	
12	8	5.00	18	5.00	18	76%	8	
13	7	4.72	17	4.72	17	74%	7	
14	6	4.44	16	4.44	16	72%	6	
15	5	4.17	15	4.17	15	70%	5	
Above 15 days	0	Below 4.17%	0	Below 4.17%	0	Below 70%	0	

KEY:

**D.C. OFFICE ON AGING  
ATTACHMENT Q73 - GRANTEE QUARTERLY SCORCARDS IN FY19 FOR TERRIFIC, INC. - LEAD AGENCY WARD 1  
PROGRAM AND GRANTS MONITORING CHECKLIST  
FY 2019**

Grantee Name: TERRIFIC, INC  
 Grant Title: Lead Agency/ADRC Ward 1  
 Grantee Address: 910 Westminister Ave. NW, Washington, DC  
 Grant Monitor Name: Jennifer Adu

Grant Period: FY19: 10/1/18 - 9/30/19  
 Total Grant Amount: \$1,000,472  
 Local/District Grant Amount: 901788  
 Federal Grant Amount: 98684

Date of visit: \_\_\_\_\_  
 Total Score for the visit: 0 / 100  
 Grantee #: 0  
 PO#: 594179

**Presite form:** Please fill in data each month while processing M1's and Unit Invoices, and reviewing CURT and Quarterly reports. This form will then be used as a required tool for quarterly site visits in order to assist in observing the complete quarterly performance.

**Compliance with Reporting Requirement:**

Unit Invoice M1 CURT (page 40) Q & Y (page 59)	July				August				September			
	Due Date	Initial Date Received	Final Date Received	Days Past Due	Due Date	Initial Date Received	Final Date Received	Days Past Due	Due Date	Initial Date Received	Final Date Received	Days Past Due
	August 15, 2019	August 14, 2019	August 14, 2019	-1	September 14, 2019	September 14, 2019	September 14, 2019	0	October 10, 2019	October 10, 2019	October 10, 2019	0
	August 21, 2019	August 14, 2019	August 15, 2019	-6	September 20, 2019	September 4, 2019	September 4, 2019	-16	October 10, 2019	October 10, 2019	October 10, 2019	0
	August 31, 2019	September 11, 2019	September 11, 2019	11	September 28, 2019	September 11, 2019	September 11, 2019	-17	October 18, 2019	October 16, 2019	October 16, 2019	-2
									October 10, 2019	October 10, 2019	October 10, 2019	0

**Finance and Budget Management:**

Local/District Funds	FY19 NGA Amount	YTD PASS Receipt	YTD Burn Rate	July			August			September			QUARTER 4	
				PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Average Burn Rate
Personnel & Indirect	\$573,282.63	\$585,312.58	102.1%	\$37,450.90	\$116,941.35	6.5%	\$51,940.85	\$65,000.50	9.1%	\$39,579.55	\$0.00	6.9%	\$128,971.30	7.5%
Travel	\$45.82	\$45.82	100.0%	\$0.00	\$0.00	100.0%	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$45.82	33.3%
Occupancy	\$57,764.00	\$57,659.33	99.8%	\$4,845.30	\$12,857.73	8.4%	\$4,397.00	\$8,460.73	7.6%	\$5,422.26	\$3,038.47	9.4%	\$14,664.56	8.5%
Communication	\$18,220.00	\$20,375.38	111.8%	\$577.20	\$716.16	3.2%	\$0.00	\$716.16	0.0%	\$2,294.34	-\$1,578.18	12.6%	\$2,871.54	5.3%
Supplies/Equipment	\$7,105.00	\$5,585.55	78.6%	\$0.00	-\$7,976.11	0.0%	\$0.00	-\$7,976.11	0.0%	\$159.05	-\$8,135.16	2.2%	\$159.05	0.7%
Other Directs	\$571,392.30	\$566,486.68	99.1%	\$53,893.44	\$420,884.37	9.4%	\$19,776.77	\$401,107.60	3.5%	\$346,400.13	\$54,707.47	60.6%	\$420,070.34	24.5%
Indirect Overhead	\$73,250.78	\$76,498.52	104.4%	\$5,338.62	\$24,842.04	7.3%	\$5,810.40	\$19,031.64	7.9%	\$16,940.76	\$2,090.88	23.1%	\$28,089.78	12.8%
0	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00	0.0%
0	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00	0.0%
	\$1,301,060.53	\$1,311,963.86	100.8%	\$102,151.28	\$506,816.08	7.9%	\$81,925.02	\$424,891.06	6.3%	\$410,796.09	\$0.00	31.6%	\$594,872.39	15.2%
<b>Federal Funds</b>	<b>FY19 NGA Amount</b>	<b>YTD PASS Receipt</b>	<b>YTD Burn Rate</b>	<b>PASS Receipt</b>	<b>Balance</b>	<b>Burn Rate</b>	<b>PASS Receipt</b>	<b>Balance</b>	<b>Burn Rate</b>	<b>PASS Receipt</b>	<b>Balance</b>	<b>Burn Rate</b>	<b>PASS Receipt</b>	<b>Average Burn Rate</b>
CareGiver Case Mgmt Title III E	\$62,401.00	\$28,426.80	45.6%	\$7,580.45	\$33,347.85	12.1%	\$10,991.65	\$22,356.20	17.6%	\$9,854.59	\$12,501.61	15.8%	\$28,426.69	15.2%
Counseling Title III B	\$36,283.00	\$20,271.64	55.9%	\$5,664.18	\$13,009.03	15.6%	\$7,713.70	\$5,295.33	21.3%	\$6,893.60	-\$1,598.27	19.0%	\$20,271.48	18.6%
	\$ 98,684.00	\$48,698.30	49.3%	\$ 13,244.63	\$46,356.88	13.4%	\$ 18,705.35	\$27,651.53	19.0%	\$ 16,748.19	\$10,903.34	17.0%	\$ 48,698.17	16.4%
<b>Total</b>	<b>\$1,399,744.53</b>	<b>\$1,360,662.16</b>	<b>47.3%</b>	<b>\$115,395.91</b>	<b>\$553,172.96</b>	<b>8.5%</b>	<b>\$100,630.37</b>	<b>\$452,542.59</b>	<b>7.4%</b>	<b>\$427,544.28</b>	<b>\$10,903.34</b>	<b>31.4%</b>	<b>\$643,570.56</b>	<b>15.8%</b>

**Program and Performance Progress:**

Performance Objective	YTD Reported	YTD Progress Rate	July			August			September			QUARTER 4		
			Reported	Balance	Progress Rate	Reported	Balance	Progress Rate	Reported	Balance	Progress Rate	Reported	Average Progress Rate	
Unit: CaseMgmt	2,799	2,085	74%	183	2,213	6.5%	93	2,120	3.3%	123	1,997	4.4%	398	4.7%
Unit: CompAssmnt	650	428	66%	19	-360	2.8%	33	-393	5.0%	34	-427	5.2%	85	4.4%
Unit: CongrMeal	50,000	46,358	93%	4,483	22,794	9.0%	4,393	18,401	8.8%	3,929	14,472	7.9%	12,805	8.5%
Unit: Counseling	10,000	10,648	106%	33	-7,448	0.3%	30	-7,478	0.3%	53	-7,531	0.5%	115	0.4%
Unit: HDMealWkDay	38,500	54,120	141%	4,803	1,720	12.5%	5,513	-3,793	14.3%	4,798	-8,590	12.5%	15,113	13.1%
Unit: HDMealWkEnd	7,000	5,941	85%	346	-7,167	4.9%	414	-7,581	5.9%	325	-7,906	4.6%	1,085	5.2%
Unit: HealthPro	14,800	15,803	107%	1,173	1,631	7.9%	0	1,631	0.0%	139	1,492	0.9%	1,312	3.0%
Unit: NutrCouns	300	242	81%	31	58	10.2%	0	58	0.0%	0	58	0.0%	31	3.4%
Unit: NutrEduc	1,491	1,259	84%	54	770	3.6%	0	770	0.0%	0	770	0.0%	54	1.2%
Unit: Rec/Soc	21,000	41,263	196%	4,040	-4,258	19.2%	3,460	-7,718	16.5%	3,324	-11,042	15.8%	10,824	17.2%
0	0	0	0%	0	0	0%	0	0	0%	0	0	0%	0	0%
0	0	0	0%	0	0	0%	0	0	0%	0	0	0%	0	0%
0	0	0	0%	0	0	0%	0	0	0%	0	0	0%	0	0%

**List of issues to address during the site visit:** list issues that came up during the quarter, outlined in the CURT report, and important trends observed in the table above.

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Site Visit Notes on Compliance with Reporting Requirements:

Site Visit Notes on Finance and Budget Management:

Site Visit Notes on Program and Performance Progress

<b>Finding:</b>	<b>Finding:</b>	<b>Finding:</b>
<b>Corrective Action Planned:</b>	<b>Corrective Actions Planned:</b>	<b>Corrective Action Planned:</b>
<b>Recommendations:</b>		

Score Card

	Assigned Weight	Raw Score (Points)		
Reporting	20%	20	0	Average Day Reports submitted past due date
Budget & Finance	30%	30	15.77%	Average Burn Rate
Program Progress	30%	0	0.0%	Average Progress Rate
Site Visit	20%	0	0%	Total Site Visit Score

Total Score (Points):  /100

Final Notes: Please write your overall evaluation of the site visit

**Findings:**

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KEY:

REPORTING		BUDGET		PROGRAM		SITE VISIT	
Average days past due date	Score (1 point = 1 day)	Average Monthly Burn Rate	Score (1 point = 0.27%)	Average rate of obtaining objective/ Progress Rate	Score (1 point = 0.27%)	Average Monthly Burn Rate	Score (1 point = 2%)
0	20	8.33%	30	8.33%	30	100%	20
1	19	8.05	29	8.05	29	98%	19
2	18	7.77	28	7.77	28	96%	18
3	17	7.50	27	7.50	27	94%	17
4	16	7.22	26	7.22	26	92%	16
5	15	6.94	25	6.94	25	90%	15
6	14	6.66	24	6.66	24	88%	14
7	13	6.39	23	6.39	23	86%	13
8	12	6.11	22	6.11	22	84%	12
9	11	5.83	21	5.83	21	82%	11
10	10	5.55	20	5.55	20	80%	10
11	9	5.28	19	5.28	19	78%	9
12	8	5.00	18	5.00	18	76%	8
13	7	4.72	17	4.72	17	74%	7
14	6	4.44	16	4.44	16	72%	6
15	5	4.17	15	4.17	15	70%	5
Above 15 days	0	Below 4.17%	0	Below 4.17%	0	Below 70%	0

**D.C. OFFICE ON AGING  
ATTACHMENT Q73 - GRANTEE QUARTERLY SCORCARDS IN FY19 FOR TERRIFIC, INC. - LEAD AGENCY WARD 4  
PROGRAM AND GRANTS MONITORING CHECKLIST**

FY 2019

Grantee Name: TERRIFIC, INC  
 Grant Title: Lead Agency/ADRC Ward 4  
 Grantee Address: 418 Missouri Ave. NW, Washington, DC 20011  
 Grant Monitor Name: Jennifer Adu

Grant Period: FY19 10/1/18 - 9/30/19  
 Total Grant Amount: 891453  
 Local/District Grant Amount: 775032  
 Federal Grant Amount: 85178

Date of visit: 0 / 100  
 Total Score for the visit: 0  
 Grantee #: 594186  
 PO#: 594186

*Presite form: Please fill in data each month while processinging M1's and Unit Invoices, and reviewing CURT and Quarterly reports.  
This form will then be used as a required tool for quarterly site visits in order to assist in observing the complete quarterly performance.*

**Compliance with Reporting Requirement:**

	July				August				September			
	Due Date	Initial Date Received	Final Date Received	Days Past Due	Due Date	Initial Date Received	Final Date Received	Days Past Due	Due Date	Initial Date Received	Final Date Received	Days Past Due
Unit Invoice	August 15, 2019	August 15, 2019	August 15, 2019	0	September 14, 2019	September 12, 2019	September 12, 2019	-2	October 10, 2019	October 10, 2019	October 10, 2019	0
M1	August 21, 2019	August 16, 2019	August 19, 2019	-2	September 20, 2019	September 4, 2019	September 4, 2019	-16	October 10, 2019	October 10, 2019	October 10, 2019	0
CURT (page 40)	August 31, 2019	August 20, 2019	August 20, 2019	-11	September 28, 2019	September 24, 2019	September 24, 2019	-4	October 18, 2019	October 10, 2019	October 10, 2019	-8
Q & Y (page 59)									October 18, 2019	October 10, 2019	October 10, 2019	-8

**Finance and Budget Management:**

Local/District Funds	FY19 NGA Amount	YTD PASS Receipt	YTD Burn Rate	July			August			September			QUARTER 4	
				PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Average Burn Rate
Personnel & Indirect	\$609,504.00	\$604,828.76	99.2%	\$40,946.19	\$159,402.42	6.7%	\$59,831.07	\$99,571.35	9.8%	\$53,949.92	\$0.00	8.9%	\$154,727.18	8.5%
Travel	\$0.00	\$0.00	0.0%	\$0.00	\$0.00		\$0.00	\$0.00	#DIV/0!	\$0.00	\$0.00	#DIV/0!		
Occupancy	\$71,127.00	\$72,434.57	101.8%	\$5,747.43	\$12,355.31		\$4,800.00	\$7,555.31	6.7%	\$4,980.99	\$2,574.32	7.0%	\$15,528.42	6.9%
Communication	\$15,399.00	\$17,704.28	115.0%	\$0.00	\$11.35		\$0.00	\$11.35	0.0%	\$2,316.63	-\$2,305.28	15.0%	\$2,316.63	7.5%
Supplies/Equipment	\$0.00	\$2,734.26	0.0%	\$0.00	\$0.00		\$0.00	\$0.00	#DIV/0!	\$2,734.26	-\$2,734.26	#DIV/0!	\$2,734.26	
Other Directs	\$18,052.00	\$18,052.80	100.0%	\$0.00	-\$4,213.95		\$0.00	-\$4,213.95	0.0%	\$0.00	-\$4,213.95	0.0%		0.0%
Indirect/Overhead	\$60,950.00	\$60,482.88	99.2%	\$4,094.62	\$15,939.84	6.7%	\$5,983.11	\$9,956.73	9.8%	\$5,394.99	\$4,561.74	8.9%	\$15,472.72	8.5%
0	\$0.00	\$0.00	0.0%		\$0.00			\$0.00			\$0.00			
0	\$0.00	\$0.00	0.0%		\$0.00			\$0.00			\$0.00			
	\$775,032.00	\$776,237.55	100.2%	\$50,788.24	\$126,786.79	6.6%	\$70,614.18	\$56,172.61	9.1%	\$69,376.79	\$0.00	9.0%	\$190,779.21	8.2%
<b>Federal Funds</b>														
CareGiver Case Mgmt Title III E	\$51,963.00	\$27,326.74	52.6%	\$6,831.66	\$23,982.98	13.1%	\$10,247.48	\$13,735.50	19.7%	\$10,247.47	\$3,488.03	19.7%	\$27,326.61	17.5%
Counseling Title III B	\$33,215.00	\$19,243.33	57.9%	\$5,199.85	\$11,761.16	15.7%	\$7,477.06	\$4,284.10	22.5%	\$6,566.26	-\$2,282.16	19.8%	\$19,243.17	19.3%
	\$ 85,178.00	\$46,569.92	54.7%	\$ 12,031.51	\$35,744.14	14.1%	\$ 17,724.54	\$18,019.60	20.8%	\$ 16,813.73	\$1,205.87	19.7%	\$ 46,569.78	18.2%
<b>Total</b>	<b>\$860,210.00</b>	<b>\$822,807.47</b>	<b>28.8%</b>	<b>\$62,819.75</b>	<b>\$162,530.93</b>	<b>7.6%</b>	<b>\$88,338.72</b>	<b>\$74,192.21</b>	<b>10.7%</b>	<b>\$86,190.52</b>	<b>\$1,205.87</b>	<b>10.5%</b>	<b>\$237,348.99</b>	<b>9.6%</b>

**Program and Performance Progress:**

Performance Objective	YTD Reported	YTD Progress Rate	July			August			September			QUARTER 4		
			Reported	Balance	Progress Rate	Reported	Balance	Progress Rate	Reported	Balance	Progress Rate	Reported	Average Progress Rate	
Unit: CaseMgmt	1,200	1,501	125%	117	657	9.8%	38	620	3.1%	93	527	7.7%	247	6.9%
Unit: CompAssmnt	300	475	158%	32	-468	10.7%	34	-502	11.3%	12	-513	3.8%	78	8.6%
Unit: CongrMeal	24,000	27,200	113%	2,351	8,448	9.8%	2,356	6,092	9.8%	1,736	4,356	7.2%	6,443	8.9%
Unit: Counseling	8,000	11,552	144%	758	-5,913	9.5%	920	-6,833	11.5%	853	-7,686	10.7%	2,531	10.5%
Unit: HDMealWkDay	54,000	61,022	113%	5,134	13,963	9.5%	5,059	13,963	9.4%	4,845	4,059	9.0%	15,038	9.3%
Unit: HDMealWkEnd	11,494	16,822	146%	1,346	-12,894	11.7%	1,479	-14,373	12.9%	1,363	-15,736	11.9%	4,188	12.1%
Unit: HealthPro	8,320	10,425	125%	756	-1,967	9.1%	897	-2,864	10.8%	838	-3,702	10.1%	2,491	10.0%
Unit: NutrCouns	280	307	110%	21	18	7.4%	25	-7	9.0%	19	-27	6.8%	65	7.7%
Unit: NutrEduc	2,089	2,224	106%	66	696	3.2%	203	493	9.7%	366	127	17.5%	635	10.1%
Unit: Rec/Soc	20,000	20,574	103%	1,460	7,771	7.3%	1,788	5,983	8.9%	1,656	4,327	8.3%	4,904	8.2%
0	0	0	0%	0	0		0	0		0	0		0	
0	0	0	0%	0	0		0	0		0	0		0	
0	0	0	0%	0	0		0	0		0	0		0	

**List of issues to address during the site visit:** *list issues that came up during the quarter, outlined in the CURT report, and important trends observed in the table above.*


<i>Site Visit Notes on Compliance with Reporting Requirements:</i>		<i>Site Visit Notes on Finance and Budget Management:</i>		<i>Site Visit Notes on Program and Performance Progress</i>	
<b>Finding:</b>		<b>Finding:</b>		<b>Finding:</b>	
<b>Corrective Action Planned:</b>		<b>Corrective Actions Planned:</b>		<b>Corrective Action Planned:</b>	
<b>Recommendations:</b>					

**Score Card**

	Assigned Weight	Raw Score (Points)		
Reporting	20%	20	0	Average Day Reports submitted past due date
Budget & Finance	30%	30	9.62%	Average Burn Rate
Program Progress	30%	0	0.0%	Average Progress Rate
Site Visit	20%	0	0%	Total Site Visit Score

Total Score (Points):  /100

**Final Notes:** Please write your overall evaluation of the site visit

**Findings:**

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KEY:

REPORTING		BUDGET		PROGRAM		SITE VISIT	
Average days past due date	Score (1 point = 1 day)	Average Monthly Burn Rate	Score (1 point = 0.27%)	Average rate of obtaining objective/Progress Rate	Score (1 point = 0.27%)	Average Monthly Burn Rate	Score (1 point = 2%)
0	20	8.33%	30	8.33%	30	100%	20
1	19	8.05	29	8.05	29	98%	19
2	18	7.77	28	7.77	28	96%	18
3	17	7.50	27	7.50	27	94%	17
4	16	7.22	26	7.22	26	92%	16
5	15	6.94	25	6.94	25	90%	15
6	14	6.66	24	6.66	24	88%	14
7	13	6.39	23	6.39	23	86%	13
8	12	6.11	22	6.11	22	84%	12
9	11	5.83	21	5.83	21	82%	11
10	10	5.55	20	5.55	20	80%	10
11	9	5.28	19	5.28	19	78%	9
12	8	5.00	18	5.00	18	76%	8
13	7	4.72	17	4.72	17	74%	7
14	6	4.44	16	4.44	16	72%	6
15	5	4.17	15	4.17	15	70%	5
Above 15 days	0	Below 4.17%	0	Below 4.17%	0	Below 70%	0

**D.C. OFFICE ON AGING**  
**Attachment Q73-Grantee Quarterly Scorecards in FY19 for Home Care Partners**  
**PROGRAM AND GRANTS MONITORING CHECKLIST**  
**FY 2019**

Grantee Name: Home Care Partners, Inc.  
 Grant Title: Homemaker/ALCARE  
 Grantee Address: 1234 Massachusetts Ave., N.W.  
 Grant Monitor Name: Lynn Khoo

Grant Period: FY18:10/1/18 - 9/30/19  
 Total Grant Amount: 2811088  
 Local/District Grant Amount: 2084289  
 Federal Grant Amount: 726799

Date of visit: \_\_\_\_\_  
 Total Score for the visit: 0 / 100  
 Grantee # 0  
 PO# 0

Presite form: Please fill in data each month while processing M1's and Unit Invoices, and reviewing CURT and Quarterly reports.  
 This form will then be used as a required tool for quarterly site visits in order to assist in observing the complete quarterly performance.

**Compliance with Reporting Requirement:**

	April				May				June			
	Due Date	Initial Date Received	Final Date Received	Days Past Due	Due Date	Initial Date Received	Final Date Received	Days Past Due	Due Date	Initial Date Received	Final Date Received	Days Past Due
Unit Invoice	May 16, 2017	May 16, 2017	May 16, 2017	0	June 15, 2017	January 0, 1900	January 0, 1900		July 14, 2017	January 0, 1900	January 0, 1900	
M1	May 20, 2017	May 20, 2017	June 1, 2017	12	June 20, 2017	July 5, 2017	January 0, 1900	-42906	July 20, 2017	January 0, 1900	January 0, 1900	-42936
CURT (page 40)	May 31, 2017	May 31, 2017	May 31, 2017	0	June 30, 2017	January 0, 1900	January 0, 1900	-42916	July 31, 2017	January 0, 1900	January 0, 1900	-42947
Q & Y (page 59)									July 31, 2017	January 0, 1900	January 0, 1900	-42947

**Finance and Budget Management:**

Local/District Funds	FY16 NGA Amount	YTD PASS Receipt	YTD Burn Rate	April			May			June			QUARTER 3	
				PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Average Burn Rate
Homemaker/ALCARE	\$2,534,880.00	\$1,584,416.28	62.5%	\$184,012.67	\$1,159,150.35	7.3%	\$208,686.63	\$950,463.72	8.2%		\$950,463.72		\$392,699.30	7.7%
DCCI	\$0.00	\$0.00	#DIV/0!	\$0.00	\$0.00	#DIV/0!		\$0.00			\$0.00			
Caregiver Case Management	\$0.00	\$4,683.28	#DIV/0!	\$0.00	-\$4,683.28	#DIV/0!		-\$4,683.28			-\$4,683.28			
Caregivers Institute	\$0.00	\$96,665.58	#DIV/0!	\$19,542.30	-\$75,580.83	#DIV/0!	\$21,084.75	-\$96,665.58	#DIV/0!		-\$96,665.58		\$40,627.05	
Caregiver Education	\$0.00	\$28,172.08	#DIV/0!	\$5,217.05	-\$22,172.47	#DIV/0!	\$5,999.61	-\$28,172.08	#DIV/0!		-\$28,172.08		\$11,216.66	
Caregiver Respite	\$0.00	\$6,237.79	#DIV/0!	\$1,183.05	-\$5,559.65	#DIV/0!	\$678.14	-\$6,237.79	#DIV/0!		-\$6,237.79		\$1,861.19	
Audit	\$0.00	\$0.00	#DIV/0!	\$0.00	\$0.00	#DIV/0!		\$0.00			\$0.00			
0	\$0.00	\$0.00	#DIV/0!		\$0.00			\$0.00			\$0.00			
0	\$0.00	\$0.00	#DIV/0!		\$0.00			\$0.00			\$0.00			
0	\$0.00	\$0.00	#DIV/0!		\$0.00			\$0.00			\$0.00			
0	\$0.00	\$0.00	#DIV/0!		\$0.00			\$0.00			\$0.00			
0	\$0.00	\$0.00	#DIV/0!		\$0.00			\$0.00			\$0.00			
0	\$0.00	\$0.00	#DIV/0!		\$0.00			\$0.00			\$0.00			
0	\$0.00	\$0.00	#DIV/0!		\$0.00			\$0.00			\$0.00			
0	\$0.00	\$0.00	#DIV/0!		\$0.00			\$0.00			\$0.00			
0	\$0.00	\$0.00	#DIV/0!		\$0.00			\$0.00			\$0.00			
0	\$0.00	\$0.00	#DIV/0!		\$0.00			\$0.00			\$0.00			
0	\$0.00	\$0.00	#DIV/0!		\$0.00			\$0.00			\$0.00			
0	\$0.00	\$0.00	#DIV/0!		\$0.00			\$0.00			\$0.00			
0	\$0.00	\$0.00	#DIV/0!		\$0.00			\$0.00			\$0.00			
0	\$0.00	\$0.00	#DIV/0!		\$0.00			\$0.00			\$0.00			
0	\$0.00	\$0.00	#DIV/0!		\$0.00			\$0.00			\$0.00			
0	\$0.00	\$0.00	#DIV/0!		\$0.00			\$0.00			\$0.00			
0	\$0.00	\$0.00	#DIV/0!		\$0.00			\$0.00			\$0.00			
0	\$0.00	\$0.00	#DIV/0!		\$0.00			\$0.00			\$0.00			
0	\$0.00	\$0.00	#DIV/0!		\$0.00			\$0.00			\$0.00			
0	\$0.00	\$0.00	#DIV/0!		\$0.00			\$0.00			\$0.00			
0	\$0.00	\$0.00	#DIV/0!		\$0.00			\$0.00			\$0.00			
	\$2,534,880.00	\$1,720,175.01	67.9%	\$209,955.07	\$1,051,154.12	8.3%	\$236,449.13	\$814,704.99	9.3%	\$0.00	\$814,704.99	0.0%	\$446,404.20	5.9%

Federal Funds	FY16 NGA Amount	YTD PASS Receipt	YTD Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Average Burn Rate
Homemaker/ALCare	\$0.00	\$0.00	#DIV/0!		\$0.00			\$0.00			\$0.00			
DCCI	\$0.00	\$0.00	#DIV/0!	\$0.00		#DIV/0!		\$0.00			\$0.00			
0	\$0.00	\$0.00	#DIV/0!		\$0.00			\$0.00			\$0.00			
0	\$0.00	\$0.00	#DIV/0!		-\$61,519.99			-\$61,519.99			-\$61,519.99			
0	\$0.00	\$0.00	#DIV/0!		-\$16,214.27			-\$16,214.27			-\$16,214.27			





List of issues to address during the site visit: list issues that came up during the quarter, outlined in the CURT report, and important trends observed in the table above.

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Site Visit Notes on Compliance with Reporting Requirements:

Site Visit Notes on Finance and Budget Management:

Site Visit Notes on Program and Performance Progress

Finding:	Finding:	Finding:
Deficiencies:	Deficiencies:	Deficiencies:
Corrective Actions Planned:	Corrective Actions Planned:	Corrective Actions Planned:

Score Card

	Assigned Weight	Raw Score (Points)	
Reporting	20%	20	-30047
Budget & Finance	30%	30	8.65%
Program Progress	30%	28	7.8%

Average Day Reports submitted past due date  
Average Burn Rate  
Average Progress Rate

Total Score (Points): 78 /80

Final Notes: Please write your overall evaluation of the site visit

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KEY:

REPORTING		BUDGET		PROGRAM	
Average days past due date	Score (1 point = 1 day)	Average Monthly Burn Rate	Score (1 point = 0.27%)	Average rate of obtaining objective/ Progress Rate	Score (1 point = 0.27%)
0	20	8.33%	30	8.33%	30
1	19	8.05	29	8.05	29
2	18	7.77	28	7.77	28
3	17	7.50	27	7.50	27
4	16	7.22	26	7.22	26
5	15	6.94	25	6.94	25
6	14	6.66	24	6.66	24
7	13	6.39	23	6.39	23
8	12	6.11	22	6.11	22
9	11	5.83	21	5.83	21
10	10	5.55	20	5.55	20
11	9	5.28	19	5.28	19
12	8	5.00	18	5.00	18
13	7	4.72	17	4.72	17

14	6	4.44	16	4.44	16
15	5	4.17	15	4.17	15
Above 15 days	0	Below 4.17%	0	Below 4.17%	0

**D.C. OFFICE ON AGING**  
**Attachment Q73-Grantee Quarterly Scorecards in FY 19 for So Others Might Eat (SOME)**  
**PROGRAM AND GRANTS MONITORING CHECKLIST**  
**FY 2019**

<b>Grantee Name:</b> <u>SO OTHER MIGHT EAT (SOME)</u>	<b>Grant Period:</b> <u>FY18: 10/1/18 - 9/30/19</u>	<b>Date of visit:</b> _____ / _____ / _____
<b>Grant Title:</b> <u>Senior Services</u>	<b>Total Grant Amount:</b> <u>\$546,196.00</u>	<b>Total Score for the visit:</b> <u>#DIV/0!</u> / 100
<b>Grantee Address:</b> <u>1667 Good Hope Road SE, Washington DC 20020</u>	<b>Local/District Grant Amount:</b> <u>\$546,196.00</u>	<b>Grantee #:</b> <u>SOM21A-19</u>
<b>Grant Monitor Name:</b> <u>Kay-Anne Spence</u>	<b>Federal Grant Amount:</b> <u>\$0.00</u>	<b>PO#:</b> <u>PO595390</u>

*Presite form: Please fill in data each month while processing M1's and Unit Invoices, and reviewing CURT and Quarterly reports.  
This form will then be used as a required tool for quarterly site visits in order to assist in observing the complete quarterly performance.*

**Compliance with Reporting Requirement:**

Unit Invoice  
M1  
CURT (page 40)  
Q & Y (page 59)  
Audit

January				February				March			
Due Date	Initial Date Received	Final Date Received	Days Past Due	Due Date	Initial Date Received	Final Date Received	Days Past Due	Due Date	Initial Date Received	Final Date Received	Days Past Due
February 15, 2019				March 15, 2019				April 16, 2019			
February 20, 2019				March 20, 2019				April 20, 2019			
February 28, 2019				March 30, 2019				April 30, 2019			
								April 20, 2019			
								March 30, 2019			

**Finance and Budget Management:**

Local/District Funds	FY19 NGA Amount	YTD PASS Receipt	YTD Burn Rate	January			February			March			QUARTER 2			
				PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Average Burn Rate		
Personnel	\$ 616,255.61	\$ 163,298.53	26.5%	\$ -	\$ 452,957.08	0.0%	\$ -	\$ 452,957.08	0.0%	\$ -	\$ 452,957.08	0.0%	\$ -	\$ 452,957.08	0.0%	
Occupancy	\$ 50,688.00	\$ 12,672.00	25.0%	\$ -	\$ 38,016.00	0.0%	\$ -	\$ 38,016.00	0.0%	\$ -	\$ 38,016.00	0.0%	\$ -	\$ 38,016.00	0.0%	
Supplies/Equipment	\$ 18,000.00	\$ 2,143.48	11.9%	\$ -	\$ 15,856.52	0.0%	\$ -	\$ 15,856.52	0.0%	\$ -	\$ 15,856.52	0.0%	\$ -	\$ 15,856.52	0.0%	
Other Directs	\$ 20,800.00	\$ 2,763.77	13.3%	\$ -	\$ 18,036.23	0.0%	\$ -	\$ 18,036.23	0.0%	\$ -	\$ 18,036.23	0.0%	\$ -	\$ 18,036.23	0.0%	
Less Grantee Share	\$ (160,547.61)	\$ (24,715.63)	0.0%	\$ -	\$ (135,831.98)	0.0%	\$ -	\$ (135,831.98)	0.0%	\$ -	\$ (135,831.98)	0.0%	\$ -	\$ (135,831.98)	0.0%	
	\$ 545,196.00	\$ 156,162.15	0.0%	\$ -	\$ 389,033.85	0.0%	\$ -	\$ 389,033.85	0.0%	\$ -	\$ 389,033.85	0.0%	\$ -	\$ 389,033.85	0.0%	\$ -

Service PO lines	FY19 NGA Amount	YTD PASS Receipt	YTD Burn Rate	January			February			March			QUARTER 2			
				PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Average Burn Rate		
Counseling	\$ 79,655.00	\$ -	0.0%	\$ -	\$ 79,655.00	0.0%	\$ -	\$ 79,655.00	0.0%	\$ -	\$ 79,655.00	0.0%	\$ -	\$ 79,655.00	0.0%	
Health Promotion	\$ 14,148.00	\$ -	0.0%	\$ -	\$ 14,148.00	0.0%	\$ -	\$ 14,148.00	0.0%	\$ -	\$ 14,148.00	0.0%	\$ -	\$ 14,148.00	0.0%	
Recreation and socialization	\$ 18,571.00	\$ -	0.0%	\$ -	\$ 18,571.00	0.0%	\$ -	\$ 18,571.00	0.0%	\$ -	\$ 18,571.00	0.0%	\$ -	\$ 18,571.00	0.0%	
Kuehner Place for Abused and Neglected Elderly	\$ 297,318.00	\$ 76,999.48	25.9%	\$ -	\$ 220,318.52	0.0%	\$ -	\$ 220,318.52	0.0%	\$ -	\$ 220,318.52	0.0%	\$ -	\$ 220,318.52	0.0%	
Home bound Senior Program	\$ 135,504.00	\$ 35,092.85	25.9%	\$ -	\$ 100,411.15	0.0%	\$ -	\$ 100,411.15	0.0%	\$ -	\$ 100,411.15	0.0%	\$ -	\$ 100,411.15	0.0%	
	\$ 545,196.00	\$ 112,092.33	0.0%	\$ -	\$ 433,103.67	0.0%	\$ -	\$ 433,103.67	0.0%	\$ -	\$ 433,103.67	0.0%	\$ -	\$ 433,103.67	0.0%	\$ -

<b>Total</b>	<b>\$ 545,196.00</b>	<b>\$ 268,254.48</b>	<b>0</b>	<b>\$0.00</b>	<b>\$ 389,033.85</b>	<b>0.0%</b>	<b>\$ -</b>	<b>\$ 389,033.85</b>	<b>0.0%</b>	<b>\$ -</b>	<b>\$ 389,033.85</b>	<b>0.0%</b>	<b>\$ -</b>	<b>\$ 389,033.85</b>	<b>0.0%</b>	<b>\$ -</b>	<b>0.0%</b>
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**Program and Performance Progress:**

Performance Objective	YTD Reported	YTD Progress Rate	January			February			March			QUARTER 2		
			Reported	Balance	Progress Rate	Reported	Balance	Progress Rate	Reported	Balance	Progress Rate	Reported	Average Progress Rate	
Unit: Counseling	5,500.0	1,937.0	35.2%	0.0	3,563	0.0%	0.0	3,563.0	0.0%	0.0	99.0	0.0%	0.0	0.0%
Unit: Health Promotion	5,240.0	1,394.0	26.6%	0.0	3,846	0.0%	0.0	3,846.0	0.0%	0.0	16.0	0.0%	0.0	0.0%
Unit: Recreation and socialization	15,454.0	5,285.0	34.2%	0.0	10,169	0.0%	0.0	10,169.0	0.0%	0.0	10,169.0	0.0%	0.0	0.0%
Unit: Kuehner Place for Abused and Neglected Elderly	20.0	0.0	0.0%	0.0	20	0.0%	0.0	20.0	0.0%	0.0	20.0	0.0%	0.0	0.0%
Unit: Home bound Senior Program	330.0	0.0	0.0%	0.0	330	0.0%	0.0	330.0	0.0%	0.0	330.0	0.0%	0.0	0.0%

**List of issues to address during the site visit:** *list issues that came up during the quarter, outlined in the CURT report, and important trends observed in the table above.*

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% 2000000%

*Site Visit Notes on Compliance with Reporting Requirements:*

*Site Visit Notes on Finance and Budget Management:*

*Site Visit Notes on Program and Performance Progress*

<b>Finding:</b>	<b>Finding:</b>	<b>Finding:</b>

Deficiencies:	Deficiencies:	Deficiencies:
Corrective Actions Planned:	Corrective Actions Planned:	Corrective Actions Planned:

**Score Card**

	Assigned Weight	Raw Score (Points)		
Reporting	20%	#DIV/0!	#DIV/0!	Average Day Reports submitted past due date
Budget & Finance	30%	0	0.00%	Average Burn Rate
Program Progress	30%	0	0.0%	Average Progress Rate

Total Score (Points): #DIV/0! /80

**Final Notes:** Please write your overall evaluation of the site visit

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KEY:

REPORTING		BUDGET		PROGRAM	
Average days past due date	Score (1 point = 1 day)	Average Monthly Burn Rate	Score (1 point = 0.27%)	Average rate of obtaining objective/ Progress Rate	Score (1 point = 0.27%)
0	20	8.33%	30	8.33%	30
1	19	8.05	29	8.05	29
2	18	7.77	28	7.77	28
3	17	7.50	27	7.50	27
4	16	7.22	26	7.22	26
5	15	6.94	25	6.94	25
6	14	6.66	24	6.66	24
7	13	6.39	23	6.39	23
8	12	6.11	22	6.11	22
9	11	5.83	21	5.83	21
10	10	5.55	20	5.55	20
11	9	5.28	19	5.28	19
12	8	5.00	18	5.00	18
13	7	4.72	17	4.72	17
14	6	4.44	16	4.44	16
15	5	4.17	15	4.17	15
Above 15 days	0	Below 4.17%	0	Below 4.17%	0

**D.C. OFFICE ON AGING**  
**Attachment Q73 - Grantee Quarterly Scorecards in FY19 for Bernice Fonteneau**  
**PROGRAM AND GRANTS MONITORING CHECKLIST**  
**FY 2019**

Grantee Name: Mary's Center Grant Period: 10/1/2018 - 9/30/2019  
 Grant Title: Bernice Fonteneau Total Grant Amount: \$376,800  
 Grantee Address: 3531 Georgia Ave. NW 20010 Local/District Grant Amount: \$360,358  
 Grant Monitor Name: Stephanie Bryant Federal Grant Amount: \$16,442

Date of visit: \_\_\_\_\_  
 Total Score for the visit: 54 / 100  
 Grantee # \_\_\_\_\_  
 PO# PO573388

**Compliance with Reporting Requirement:**

Unit Invoice M1 CURT (page 40) Q & Y (page 59) Audit	January				February				March			
	Due Date	Initial Date Received	Final Date Received	Days Past Due	Due Date	Initial Date Received	Final Date Received	Days Past Due	Due Date	Initial Date Received	Final Date Received	Days Past Due
	February 15, 2019	March 18, 2019	March 18, 2019	31	March 15, 2019	April 5, 2019	April 5, 2019	21	April 14, 2019	May 13, 2019	May 13, 2019	29
	February 20, 2019	March 18, 2019	March 18, 2019	26	March 20, 2019	April 5, 2019	April 5, 2019	16	April 20, 2019	May 13, 2019	May 13, 2019	23
	February 28, 2019	March 4, 2019	March 4, 2019	4	March 31, 2019	April 1, 2019	April 1, 2019	1	April 28, 2019	May 1, 2019	May 1, 2019	3
									April 20, 2019			
									March 30, 2019			

**Finance and Budget Management:**

Local/District Funds	FY18 NGA Amount	YTD PASS Receipt	YTD Burn Rate	January			February			March			QUARTER 2	
				PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Average Burn Rate
Health Promotion Disease Pr	\$360,358.00	\$157,057.80	43.6%	\$20,681.53	\$262,837.06	5.7%	\$26,252.59	\$236,584.47	7.3%	\$29,726.54	\$206,857.93	8.2%	\$76,660.66	7.1%
<b>Federal Funds</b>														
Title 3D Evidence Based	\$16,442.00	\$4,604.55	28.0%	\$565.25	\$13,829.62	3.4%	\$ 800.53	\$13,029.09	4.9%	\$1,191.64	\$11,837.45	7.2%	\$2,557.42	5.2%
<b>Total</b>	<b>\$376,800.00</b>	<b>\$161,662.35</b>	<b>43%</b>	<b>\$21,246.78</b>	<b>\$276,666.68</b>	<b>5.6%</b>	<b>\$27,053.12</b>	<b>\$249,613.56</b>	<b>7.2%</b>	<b>\$30,918.18</b>	<b>\$218,695.38</b>	<b>8.2%</b>	<b>\$79,218.08</b>	<b>7.0%</b>

**Program and Performance Progress:**

Performance Objective	YTD Reported	YTD Progress Rate	January			February			March			QUARTER 2		
			Reported	Balance	Progress Rate	Reported	Balance	Progress Rate	Reported	Balance	Progress Rate	Reported	Average Progress Rate	
Health Promotion Disease	58,600	36.888	63%	9,198	30,406	15.7%	4,713	25,693	8.0%	5,781	19,912	9.9%	19,692	11.2%
Evidence Based	260	104	40%	0	260	0.0%	47	213	18.1%	57	156	21.9%	104	13.3%

List of issues to address during the site visit: list issues that came up during the quarter, outlined in the CURT report, and important trends observed in the table above.

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*Site Visit Notes on Compliance with Reporting Requirements:*

*Site Visit Notes on Finance and Budget Management:*

*Site Visit Notes on Program and Performance Progress*

Findings:	Findings:	Findings:
Deficiencies:	Deficiencies:	Deficiencies:
Corrective Actions Planned:	Corrective Actions Planned:	Corrective Actions Planned:

**Score Card**

	Assigned Weight	Raw Score (Points)	
Reporting	20%	0	Average Day Reports submitted past due date
Budget & Finance	30%	25	Average Burn Rate
Program Progress	30%	29	Average Progress Rate

Total Score (Points): 54 /80

**Final Notes:** Please write your overall evaluation of the site visit

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KEY:

REPORTING		BUDGET		PROGRAM	
Average days past due	Score (1 point = 1 day)	Average Monthly Burn	Score (1 point =	Average rate of	Score (1 point =
0	20	8.33%	30	8.33%	30
1	19	8.05	29	8.05	29
2	18	7.77	28	7.77	28
3	17	7.50	27	7.50	27
4	16	7.22	26	7.22	26
5	15	6.94	25	6.94	25
6	14	6.66	24	6.66	24
7	13	6.39	23	6.39	23
8	12	6.11	22	6.11	22
9	11	5.83	21	5.83	21
10	10	5.55	20	5.55	20
11	9	5.28	19	5.28	19
12	8	5.00	18	5.00	18
13	7	4.72	17	4.72	17
14	6	4.44	16	4.44	16
15	5	4.17	15	4.17	15
Above 15 days	0	Below 4.17%	0	Below 4.17%	0

**D.C. OFFICE ON AGING**  
Attachment Q73 – Grantee Quarterly Scorecards in FY19 for DC YellowCab  
**PROGRAM AND GRANTS MONITORING CHECKLIST**  
FY 2019

Grantee Name: DC Yellow Cab  
Grant Title: Senior MedExpress  
Grantee Address: 1636 Bladensburg Rd  
Grant Monitor Name: Asha Hamilton

Grant Period: FY19: 10/1/18 - 9/30/19  
Total Grant Amount: \$1,800,000  
Local/District Grant Amount: \$1,800,000  
Federal Grant Amount: \$0

Date of visit: \_\_\_\_\_  
Total Score for the visit: 0 / 100  
Grantee #: \_\_\_\_\_  
PO# PO594185

**Presite form:** Please fill in data each month while processinging M1's and Unit Invoices, and reviewing CURT and Quarterly reports.  
This form will then be used as a required tool for quarterly site visits in order to assist in observing the complete quarterly performance.

**Compliance with Reporting Requirement:**

Unit Invoice  
M1  
CURT (page 40)  
Q & Y (page 59)

October				November				December			
Due Date	Initial Date Received	Final Date Received	Days Past Due	Due Date	Initial Date Received	Final Date Received	Days Past Due	Due Date	Initial Date Received	Final Date Received	Days Past Due
November 15, 2018	November 9, 2018	November 5, 2018	-10	December 15, 2018	December 5, 2018	December 7, 2018	-8	January 16, 2019	December 31, 2018	January 5, 2019	-11
November 21, 2018				December 20, 2018				January 19, 2019			
November 30, 2018				December 29, 2018				January 31, 2019			

**Finance and Budget Management:**

Local/District Funds	FY19 NGA Amount	YTD Burn Rate	October			November			December			QUARTER 1	
			PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Average Burn Rate
Other Directs	\$1,800,000.00	19.9%	\$124,852.00	\$1,675,148.00		\$115,304.00	\$1,559,844.00		\$118,020.00	\$1,441,824.00	6.6%	\$358,176.00	6.6%
	\$1,800,000.00	0.198986667	\$124,852.00	\$1,675,148.00	6.9%	\$115,304.00	\$1,559,844.00	6.4%	\$118,020.00	\$1,441,824.00	6.6%	\$358,176.00	6.6%

**Program and Performance Progress:**

	Performance Objective	YTD Progress Rate	October			November			December			QUARTER 1	
			Reported	Balance	Progress Rate	Reported	Balance	Progress Rate	Reported	Balance	Progress Rate	Reported	Average Progress Rate
Number of Trips	64285	19.9%	4459	59,826	6.9%	4118	55,708	6.4%	4215	51,493	6.6%	12,792	6.6%
Total Cost Cap	\$1,800,000.00	19.9%	\$124,852.00	1,675,148	6.9%	\$115,304.00	1,559,844	6.4%	\$118,020.00	1,441,824	6.6%	358,176	6.6%

**List of issues to address during the site visit:** list issues that came up during the quarter, outlined in the CURT report, and important trends observed in the table above.

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*Site Visit Notes on Compliance with Reporting Requirements:*

*Site Visit Notes on Finance and Budget Management:*

*Site Visit Notes on Program and Performance Progress*

<b>Finding:</b> None	<b>Finding:</b> None	<b>Finding:</b> None
<b>Corrective Action:</b> None	<b>Corrective Action:</b> None	<b>Corrective Action:</b> None
<b>Recommendations:</b> Follow up calls for outstanding applications (IR&A)	<b>Recommendation:</b> None	<b>Corrective Actions Planned:</b> None

**Score Card**

	Assigned Weight	Raw Score (Points)	
Reporting	20%	20	Average Day Reports submitted past due date
Budget & Finance	30%	#REF!	Average Burn Rate
Program Progress	30%	28	Average Progress Rate
Site Visit	20%	122	Total Site Visit Score

Total Score (Points): 0 /100

**Final Notes:** Please write your overall evaluation of the site visit

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**Recommendation:**

KEY:

REPORTING		BUDGET		PROGRAM		SITE VISIT	
Average days past due date	Score (1 point = 1 day)	Average Monthly Burn Rate	Score (1 point = 0.27%)	Average rate of obtaining objective/ Progress Rate	Score (1 point = 0.27%)	Average Monthly Burn Rate	Score (1 point = 2%)
0	20	8.33%	30	8.33%	30	100%	20
1	19	8.05	29	8.05	29	98%	19
2	18	7.77	28	7.77	28	96%	18
3	17	7.50	27	7.50	27	94%	17
4	16	7.22	26	7.22	26	92%	16
5	15	6.94	25	6.94	25	90%	15
6	14	6.66	24	6.66	24	88%	14
7	13	6.39	23	6.39	23	86%	13
8	12	6.11	22	6.11	22	84%	12
9	11	5.83	21	5.83	21	82%	11
10	10	5.55	20	5.55	20	80%	10
11	9	5.28	19	5.28	19	78%	9
12	8	5.00	18	5.00	18	76%	8
13	7	4.72	17	4.72	17	74%	7
14	6	4.44	16	4.44	16	72%	6
15	5	4.17	15	4.17	15	70%	5
Above 15 days	0	Below 4.17%	0	Below 4.17%	0	Below 70%	0



**D.C. OFFICE ON AGING**  
**Attachment Q73 – Grantee Quarterly Scorecards in FY19 for East River Family Strengthening and Collaborative Ward 7**  
**PROGRAM AND GRANTS MONITORING CHECKLIST**  
**FY 2019**

Grantee Name: East River Family Strengthening  
 Grant Title: \_\_\_\_\_  
 Grantee Address: 1917 Minnesota Avenue NE Washington DC 20019  
 Grant Monitor Name: Maxine Crowder

Grant Period: FY16: 10/1/18 - 9/30/19  
 Total Grant Amount: \$1,713,353  
 Local/District Grant Amount: \$1,505,610  
 Federal Grant Amount: \$207,743

Date of visit: 2/25/2019  
 Total Score for the visit: 0 / 100  
 Grantee # ERF-22W-19  
 PO# 594180

**Presite form:** Please fill in data each month while processing MI's and Unit Invoices, and reviewing CURT and Quarterly reports.  
 This form will then be used as a required tool for quarterly site visits in order to assist in observing the complete quarterly performance

**Compliance with Reporting Requirement:**

Unit Invoice	October				November				December			
	Due Date	Initial Date Received	Final Date Received	Days Past Due	Due Date	Initial Date Received	Final Date Received	Days Past Due	Due Date	Initial Date Received	Final Date Received	Days Past Due
M1	November 15, 2018	November 26, 2018	November 26, 2018	11	December 15, 2018	December 21, 2018	December 21, 2018	6	January 16, 2019	January 10, 2019	January 10, 2019	-6
CURT (page 40)	November 21, 2018	November 26, 2018	November 26, 2018	5	December 20, 2018	December 18, 2018	December 20, 2018	0	January 19, 2019	January 10, 2019	January 10, 2019	-9
Q & Y (page 59)	November 30, 2018	December 20, 2018	December 20, 2018	20	December 29, 2018	January 25, 2019	January 25, 2019	27	January 31, 2019	January 25, 2019	January 25, 2019	-6
	31-Jan-19								January 31, 2019	January 31, 2019	January 31, 2019	0

**Finance and Budget Management:**

Local/District Funds	FY19 NGA Amount	YTD Burn Rate	October			November			December			QUARTER 1	
			PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Average Burn Rate
	\$1,068,768.50	18.4%	\$47,915.46	\$1,020,853.04	4.5%	\$70,677.59	\$950,175.45	11.1%	\$78,375.85	\$871,799.60	18.4%	\$196,968.90	6.1%
Travel	\$2,022.00	13.0%		\$2,022.00	0.0%	\$143.93	\$1,878.07	7.1%	\$118.61	\$1,759.46	13.0%	\$262.54	4.3%
Occupancy	\$69,450.00	14.4%		\$69,450.00	0.0%	\$10,000.00	\$59,450.00	14.4%		\$59,450.00	14.4%	\$10,000.00	4.8%
Communication	\$17,500.00	10.7%		\$17,500.00	0.0%		\$17,500.00	0.0%	\$1,875.01	\$15,624.99	10.7%	\$1,875.01	3.6%
Supplies/ Equipment	\$5,400.00	21.3%		\$5,400.00	0.0%		\$5,400.00	0.0%	\$1,149.76	\$4,250.24	21.3%	\$1,149.76	7.1%
Other Directs	\$154,358.00	9.8%		\$154,358.00	0.0%	\$5,857.50	\$148,500.50	3.8%	\$9,312.00	\$139,188.50	9.8%	\$15,169.50	3.3%
Indirect Overhead	\$45,062.09	26.3%	\$4,791.55	\$40,270.54	10.6%	\$7,067.76	\$33,202.78	26.3%		\$33,202.78	26.3%	\$11,859.31	8.8%
		#VALUE!		\$0.00	#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!		#VALUE!
		#VALUE!		\$0.00	#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!		#VALUE!
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		#VALUE!		\$0.00	#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!		#VALUE!
		#VALUE!		\$0.00	#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!		#VALUE!
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		#VALUE!		\$0.00	#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!		#VALUE!
	\$1,362,560.59	17.4%	\$52,707.01	\$1,309,853.58	3.9%	\$93,746.78	\$1,216,106.80	10.7%	\$90,831.23	\$1,125,275.57	17.4%	\$237,285.02	5.8%

CDBG/Federal Funds	FY17 NGA Amount	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Average Burn Rate
<b>Evidence Based Programming Title IIIH/F: \$16,442.00</b>													
Personnel	\$0.00	#DIV/0!	\$0.00	\$0.00	#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!	\$0.00	#DIV/0!
Travel	\$0.00	#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!	\$0.00	#DIV/0!
Occupancy	\$0.00	#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!	\$0.00	#DIV/0!
Communications	\$0.00	#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!	\$0.00	#DIV/0!
Equipment	\$0.00	#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!	\$0.00	#DIV/0!
Supplies	\$0.00	#DIV/0!		\$0.00	#DIV/0!		\$0.00	0%		\$0.00	#DIV/0!	\$0.00	#DIV/0!
Other Direct	\$16,442.00	0.0%	\$0.00	\$16,442.00	0	\$0.00	\$16,442.00	#DIV/0!	\$0.00	\$16,442.00	0%	\$0.00	0%
Indirect		#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!	\$0.00	#DIV/0!
		#VALUE!		#VALUE!	#VALUE!		#VALUE!	#VALUE!		#VALUE!	#VALUE!	\$0.00	#VALUE!
<b>Caregiver Respite Title IIIH: \$16,251.00</b>													
Personnel		#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!	\$0.00	#DIV/0!
Travel		#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!	\$0.00	#DIV/0!
Occupancy		#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!	\$0.00	#DIV/0!
Communications		#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!	\$0.00	#DIV/0!
Equipment		#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!	\$0.00	#DIV/0!
Supplies		#DIV/0!		\$0.00	#DIV/0!		\$0.00	0%		\$0.00	#DIV/0!	\$0.00	#DIV/0!
Other Direct	\$16,251.00	0.0%		\$16,251.00	0		\$16,251.00	#DIV/0!		\$16,251.00	0%	\$0.00	0%
Indirect		#DIV/0!		\$0.00	#DIV/0!		\$0.00	#VALUE!		\$0.00	#DIV/0!	\$0.00	#DIV/0!
		#VALUE!		#VALUE!	#VALUE!		#VALUE!	#VALUE!		#VALUE!	#VALUE!	\$0.00	#VALUE!
<b>Case Management / Comprehensive Assessment Title IIIH: 175,050.00</b>													
Personnel	\$157,545.00	0.0%		\$157,545.00	0		\$157,545.00	#DIV/0!		\$157,545.00	0%	\$0.00	0%
Travel		#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!	\$0.00	#DIV/0!
Occupancy		#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!	\$0.00	#DIV/0!
Communications		#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!	\$0.00	#DIV/0!
Equipment		#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!	\$0.00	#DIV/0!
Supplies		#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!	\$0.00	#DIV/0!
Other Direct		#DIV/0!		\$0.00	#DIV/0!		\$0.00	0%		\$0.00	#DIV/0!	\$0.00	#DIV/0!
Indirect	\$15,745.50	0.0%		\$15,745.50	0		\$15,745.50	#DIV/0!		\$15,745.50	0%	\$0.00	0%
		#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!		\$0.00	#DIV/0!	\$0.00	#DIV/0!



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**Score Card**

	Assigned Weight	Raw Score (Points)		
Reporting	20%	15	5	Average Day Reports submitted past due date
Budget & Finance	30%	#DIV/0!	#DIV/0!	Average Burn Rate
Program Progress	30%	0	1.7%	Average Progress Rate
Site Visit	20%	#DIV/0!	#DIV/0!	Total Site Visit Score

Total Score (Points): 0 /100

**Final Notes:** *Please write your overall evaluation of the site visit*

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**Recommendation:**

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KEY:

REPORTING		BUDGET		PROGRAM		SITE VISIT	
Average days past due date	Score (1 point = 1 day)	Average Monthly Burn Rate	Score (1 point = 0.27%)	Average rate of obtaining objective/Progress Rate	Score (1 point = 0.27%)	Average Monthly Burn Rate	Score (1 point = 2%)
0	20	8.33%	30	8.33%	30	100%	20
1	19	8.05	29	8.05	29	98%	19
2	18	7.77	28	7.77	28	96%	18
3	17	7.50	27	7.50	27	94%	17
4	16	7.22	26	7.22	26	92%	16
5	15	6.94	25	6.94	25	90%	15
6	14	6.66	24	6.66	24	88%	14
7	13	6.39	23	6.39	23	86%	13
8	12	6.11	22	6.11	22	84%	12
9	11	5.83	21	5.83	21	82%	11
10	10	5.55	20	5.55	20	80%	10
11	9	5.28	19	5.28	19	78%	9
12	8	5.00	18	5.00	18	76%	8
13	7	4.72	17	4.72	17	74%	7
14	6	4.44	16	4.44	16	72%	6
15	5	4.17	15	4.17	15	70%	5
Above 15 days	0	Below 4.17%	0	Below 4.17%	0	Below 70%	0

**D.C. OFFICE ON AGING  
ATTACHMENT Q73 - GRANTEE QUARTERLY SCORCARDS IN FY19 FOR IONA SENIOR SERVICE WARD 3  
PROGRAM AND GRANTS MONITORING CHECKLIST**

Grantee Name: IONA Senior Service Ward 3  
 Grant Title: Lead Agency/ADRC Ward 3  
 Grantee Address: 4125 Albermarle Street, NW, Washington DC 20016  
 Grant Monitor Name: Jennifer Adu

Grant Period: FY19: 10/1/18 - 9/30/19  
 Total Grant Amount: \$1,564,322  
 Local/District Grant Amount: \$1,454,546  
 Federal Grant Amount: \$109,776

Date of visit: 1/18/2019  
 Total Score for the visit: 0 / 100  
 Grantee #:   
 PO#: PO594182

*Presite form: Please fill in data each month while processing M1's and Unit Invoices, and reviewing CURT and Quarterly reports. This form will then be used as a required tool for quarterly site visits in order to assist in observing the complete quarterly performance.*

**Compliance with Reporting Requirement:**

Unit Invoice M1 CURT (page 40) Q & Y (page 59)	October				November				December			
	Due Date	Initial Date Received	Final Date Received	Days Past Due	Due Date	Initial Date Received	Final Date Received	Days Past Due	Due Date	Initial Date Received	Final Date Received	Days Past Due
	November 15, 2018	November 15, 2018	November 15, 2018	0	December 15, 2018	December 14, 2018	December 14, 2018	-1	January 16, 2019	January 16, 2019	January 16, 2019	0
	November 21, 2018	November 20, 2018	November 21, 2018	0	December 20, 2018	December 18, 2018	December 19, 2018	-1	January 19, 2019	January 23, 2019	January 24, 2019	5
	November 30, 2018	November 27, 2018	November 27, 2018	-3	December 29, 2018	December 18, 2018	December 18, 2018	-11	January 31, 2019	January 24, 2019	January 24, 2019	-7
									January 20, 2019	January 31, 2019	January 21, 2019	11

**Finance and Budget Management:**

Local/District Funds	FY19 NGA Amount	YTD Burn Rate	October				November				December				QUARTER I	
			PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Average Burn Rate			
Personnel	\$1,006,639.00	24.7%	\$86,981.33	\$919,657.67	17.5%	\$88,381.50	\$831,276.17	8.8%	\$72,896.90	\$758,379.27	7.2%	\$758,379.27	11.2%			
Travel	\$7,200.00	0.0%	\$0.00	\$7,200.00	0.0%	\$0.00	\$7,200.00	0.0%	\$0.00	\$7,200.00	0.0%	\$7,200.00	0.0%			
Occupancy	\$89,955.00	32.3%	\$9,299.30	\$80,655.70	24.5%	\$9,370.70	\$71,285.00	14.5%	\$10,359.24	\$60,925.76	11.5%	\$60,925.76	16.8%			
Communication	\$69,604.00	7.9%	\$2,605.98	\$66,998.02	4.3%	\$2,597.99	\$64,400.03	0.4%	\$2,699.64	\$64,130.39	2.3%	\$64,130.39	2.3%			
Supplies/Equipments	\$13,880.00	0.0%	\$0.00	\$13,880.00	0.0%	\$230.00	\$13,650.00	0.0%	\$233.15	\$13,406.85	0.0%	\$13,406.85	0.0%			
Other Directs	\$216,068.00	9.4%	\$5,239.59	\$210,828.41	7.1%	\$7,009.92	\$203,818.49	3.9%	\$8,049.64	\$195,768.85	5.5%	\$195,768.85	5.5%			
Indirect/Overhead	\$103,048.00	24.5%	\$9,414.25	\$93,633.75	16.9%	\$8,798.36	\$84,835.39	8.3%	\$7,021.15	\$77,814.24	12.6%	\$77,814.24	12.6%			
	\$1,506,394.00	0.218248772	\$113,540.43	\$1,392,853.55	7.5%	\$116,408.47	\$1,276,445.08	7.7%	\$98,819.72	\$1,177,625.36	6.6%	\$1,177,625.36	7.3%			

Federal Funds	FY19 NGA Amount	YTD Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Average Burn Rate
Counseling Title III B	\$50,359.00	25.0%	\$4,196.58	\$46,162.42	8.3%	\$4,196.58	\$41,965.84	8.3%	\$4,196.58	\$37,769.26	8.3%	\$0.00	8.3%
Caregiver Case Mgmt Title III E	\$35,574.00	25.0%	\$2,964.50	\$32,609.50	8.3%	\$2,964.50	\$29,645.00	8.3%	\$2,964.50	\$26,680.50	8.3%	\$0.00	8.3%
Elder Abuse VII	\$23,843.00	5.0%	\$1,180.25	\$22,662.75	5.0%	\$0.00	\$22,662.75	0.0%	\$0.00	\$22,662.75	0.0%	\$0.00	1.7%
	\$109,776.00	0.206452139	\$8,341.33	\$101,434.67	7.6%	\$7,161.08	\$94,273.59	6.5%	\$7,161.08	\$87,112.51	6.5%	\$0.00	6.9%

Total	FY19 NGA Amount	YTD Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Average Burn Rate
	\$1,616,170.00	0.217447502	\$121,881.78	\$1,494,288.22	7.5%	\$123,569.55	\$1,370,718.67	7.6%	\$105,980.80	\$1,264,737.87	6.6%	\$0.00	7.2%

**Program and Performance Progress:**

Performance Objective	YTD Progress Rate	October			November			December			QUARTER I		
		Reported	Balance	Progress Rate	Reported	Balance	Progress Rate	Reported	Balance	Progress Rate	Reported	Average Progress Rate	
CaseMgmt	4.200	30.0%	444	3,757	10.6%	435	3,322	10.3%	383	2,940	9.1%	1,261	10.0%
CompAssmt	200	18.3%	11	190	5.3%	15	175	7.5%	11	164	5.5%	37	6.1%
CongrMeal	9,300	24.2%	852	8,448	9.2%	685	7,763	7.4%	716	7,047	7.7%	2,253	8.1%
Counseling	2,000	36.0%	190	1,811	9.5%	278	1,533	13.9%	253	1,281	12.6%	720	12.0%
Geriatric Day Care	10,000	18.6%	646	9,354	6.5%	563	8,791	5.6%	654	8,138	6.5%	1,862	6.2%
HDMMealWkDay	35,000	27.9%	3,237	31,763	9.2%	3,601	28,162	10.3%	2,930	25,232	8.4%	9,768	9.3%
HDMMealWkEnd	12,000	27.0%	1,058	10,942	8.8%	1,020	9,922	8.5%	1,162	8,760	9.7%	3,240	9.0%
HealthPro	4,000	35.3%	580	3,420	14.5%	420	3,000	10.5%	411	2,589	10.3%	1,411	11.8%
NutrCouns	300	35.8%	24	277	7.8%	40	237	13.2%	44	193	14.8%	107	11.9%
NutrEduc	700	38.0%	121	579	17.3%	68	511	9.7%	77	434	11.0%	266	12.7%
RecSoc	7,000	30.5%	820	6,180	11.7%	631	5,549	9.0%	682	4,867	9.7%	2,133	10.2%
TransHMeal	5,000	23.6%	375	4,625	7.5%	374	4,251	7.5%	431	3,820	8.6%	1,180	7.9%
SilverCycle	50	86.0%	21	29	42.0%	14	15	28.0%	8	7	16.0%	43	28.7%
Wellness Center	5,420	0.0%	0	5,420	0.0%	0	5,420	0.0%	0	5,420	0.0%	0	0.0%
		#DIV/0!	0	0	0	0	0	0	0	0	0	0	0

List of issues to address during the site visit: list issues that came up during the quarter, outlined in the CURT report, and important trends observed in the table above.

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Site Visit Notes on Compliance with Reporting Requirements:

Site Visit Notes on Finance and Budget Management:

Site Visit Notes on Program and Performance Progress

Finding:	Finding:	Finding:
<b>Corrective Action:</b>	<b>Deficiencies:</b>	<b>Corrective Actions Planned:</b>
<b>Recommendations:</b>	<b>Corrective Actions Planned:</b>	<b>Recommendations:</b>

**Score Card**

	Assigned Weight	Raw Score (Points)	
Reporting	20%	20	-1
Budget & Finance	30%	26	7.25%
Program Progress	30%	30	10.3%
Site Visit	20%	0	0%

Average Day Reports submitted past due date  
 Average Burn Rate  
 Average Progress Rate  
 Total Site Visit Score

Total Score (Points):  /100

**Final Notes:** Please write your overall evaluation of the site visit

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**Recommendation:** None.

KEY:	REPORTING		BUDGET		PROGRAM		SITE VISIT	
	Average days past due date	Score (1 point = 1 day)	Average Monthly Burn Rate	Score (1 point = 0.27%)	Average rate of obtaining objective/ Progress Rate	Score (1 point = 0.27%)	Average Monthly Burn Rate	Score (1 point = 2%)
	0	20	8.33%	30	8.33%	30	100%	20
	1	19	8.05	29	8.05	29	98%	19
	2	18	7.77	28	7.77	28	96%	18
	3	17	7.50	27	7.50	27	94%	17
	4	16	7.22	26	7.22	26	92%	16
	5	15	6.94	25	6.94	25	90%	15
	6	14	6.66	24	6.66	24	88%	14
	7	13	6.39	23	6.39	23	86%	13
	8	12	6.11	22	6.11	22	84%	12
	9	11	5.83	21	5.83	21	82%	11
	10	10	5.55	20	5.55	20	80%	10
	11	9	5.28	19	5.28	19	78%	9
	12	8	5.00	18	5.00	18	76%	8
	13	7	4.72	17	4.72	17	74%	7
	14	6	4.44	16	4.44	16	72%	6
	15	5	4.17	15	4.17	15	70%	5
	Above 15 days	0	Below 4.17%	0	Below 4.17%	0	Below 70%	0

D.C. OFFICE ON AGING

Quarterly Scorecards in FY19 for George Washington University Q73-Grantee W

PROGRAM AND GRANTS MONITORING CHECKLIST

FY 2019

Grantee Name: George Washington University HICP  
 Grant Title:  
 Grantee Address: 2000 G Street, NW DC 20052  
 Grant Monitor Name: Maxine Crowder

Grant Period: FY16: 10/1/18 - 9/30/19  
 Total Grant Amount: \$52,388  
 Local/District Grant Amount: \$52,388  
 Federal Grant Amount:

Date of visit:  
 Total Score for the visit: 0 / 100  
 Grantee # GWU13C-19  
 PO# 595137

Presite form: Please fill in data each month while processing MI's and Unit Invoices, and reviewing CURT and Quarterly reports. This form will then be used as a required tool for quarterly site visits in order to assist in observing the complete quarterly performance

Compliance with Reporting Requirement:

	October				November				December			
Unit Invoice	Due Date	Initial Date Received	Final Date Received	Days Past Due	Due Date	Initial Date Received	Final Date Received	Days Past Due	Due Date	Initial Date Received	Final Date Received	Days Past Due
M1	November 15, 2018				December 15, 2018				January 16, 2019			
CURT (page 40)	November 21, 2018	November 20, 2018	November 20, 2018	-1	December 20, 2018				January 20, 2019	January 17, 2019		-43485
Q & Y (page 59)	November 30, 2018				December 30, 2018				January 31, 2019			

Finance and Budget Management:

Local/District Funds	FY19 NGA Amount	YTD Burn Rate	October			November			December			QUARTER 1	
			PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Average Burn Rate
Personnel	\$47,625.00	100.0%	\$12,074.17	\$35,550.83	25.4%	\$10,218.62	\$25,332.21	21.5%	\$25,332.47	-\$0.26	53.2%	\$47,625.26	33.3%
Travel				\$0.00			\$0.00			\$0.00			
Other Direct				\$0.00			\$0.00			\$0.00			
Indirect/Overhead	\$4,763.00	100.0%	\$1,207.42	\$3,555.58		\$1,021.86	\$2,533.72		\$2,533.28	\$0.44			
				\$0.00			\$0.00			\$0.00			
				\$0.00			\$0.00			\$0.00			
				\$0.00			\$0.00			\$0.00			
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	\$52,388.00	0.999996564	\$13,281.59	\$39,106.41	25.4%	\$11,240.48	\$27,865.93	21.5%	\$27,865.75	\$0.18	53.2%	\$47,625.26	33.3%

CDBG/Federal Funds	FY19 NGA Amount	YTD Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Average Burn Rate
				\$0.00			\$0.00			\$0.00			
				\$0.00			\$0.00			\$0.00			
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				\$0.00			\$0.00			\$0.00			
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	\$0.00		\$0.00	\$0.00	#DIV/0!	\$0.00	\$0.00	#DIV/0!	\$0.00	\$0.00	#DIV/0!	\$0.00	

Total	\$52,388.00	0.999996564	\$13,281.59	\$39,106.41	25.4%	\$11,240.48	\$27,865.93	21.5%	\$27,865.75	\$0.18	53.2%	\$47,625.26	33.3%
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Program and Performance Progress:

Performance Objective	YTD Progress Rate	October			November			December			QUARTER 1		
		Reported	Balance	Progress Rate	Reported	Balance	Progress Rate	Reported	Balance	Progress Rate	Reported	Average Progress Rate	
			0			0			0			0	
			0			0			0			0	
			0			0			0			0	
			0			0			0			0	
			0			0			0			0	
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List of issues to address during the site visit: list issues that came up during the quarter, outlined in the CURT report, and important trends observed in the table above.

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\_\_\_\_\_

Site Visit Notes on Compliance with Reporting Requirements:	Site Visit Notes on Finance and Budget Management:	Site Visit Notes on Program and Performance Progress
<b>Finding:</b>	<b>Finding:</b>	<b>Finding:</b>
<b>Corrective Action:</b>	<b>Corrective Action:</b>	<b>Corrective Action:</b>
<b>Recommendations:</b>	<b>Recommendation:</b>	<b>Corrective Actions Planned:</b>

Score Card

	Assigned Weight	Raw Score (Points)	
Reporting	20%	20	-21743
Budget & Finance	30%	30	33.33%
Program Progress	30%	#DIV/0!	#DIV/0!
Site Visit	20%	#DIV/0!	#DIV/0!

Average Day Reports submitted past due date  
Average Burn Rate  
Average Progress Rate  
Total Site Visit Score

Total Score (Points):  /100

Final Notes: Please write your overall evaluation of the site visit

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\_\_\_\_\_

\_\_\_\_\_

Recommendation:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

KEY:	REPORTING		BUDGET		PROGRAM		SITE VISIT	
	Average days past due date	Score (1 point = 1 day)	Average Monthly Burn Rate	Score (1 point = 0.27%)	Average rate of obtaining objective/Progress Rate	Score (1 point = 0.27%)	Average Monthly Burn Rate	Score (1 point = 2%)
	0	20	8.33%	30	8.33%	30	100%	20
	1	19	8.05	29	8.05	29	98%	19
	2	18	7.77	28	7.77	28	96%	18
	3	17	7.50	27	7.50	27	94%	17
	4	16	7.22	26	7.22	26	92%	16
	5	15	6.94	25	6.94	25	90%	15

6	14	6.66	24	6.66	24	88%	14
7	13	6.39	23	6.39	23	86%	13
8	12	6.11	22	6.11	22	84%	12
9	11	5.83	21	5.83	21	82%	11
10	10	5.55	20	5.55	20	80%	10
11	9	5.28	19	5.28	19	78%	9
12	8	5.00	18	5.00	18	76%	8
13	7	4.72	17	4.72	17	74%	7
14	6	4.44	16	4.44	16	72%	6
15	5	4.17	15	4.17	15	70%	5
Above 15 days	0	Below 4.17%	0	Below 4.17%	0	Below 70%	0



**D.C. OFFICE ON AGING**  
**Attachment Q73 – Grantee Quarterly Scorecards in FY19 for Iona Senior Services Alzheimer's Disease Initiative**  
**PROGRAM AND GRANTS MONITORING CHECKLIST**  
**FY 2019**

Grantee Name: IONA Senior Services  
 Grant Title: Alzheimer's Disease Initiative  
 Grantee Address: 4125 Albermarle Street, N.W.  
 Grant Monitor Name: Kay-Anne Spence

Grant Period: FY19: 10/1/18- 9/30/19  
 Total Grant Amount: \$750,000.00  
 Local/District Grant Amount: \$750,000.00  
 Federal Grant Amount: \$0.00

Date of visit: 2/26/2019  
 Total Score for the visit: 93 / 100  
 Grantee #: ALZ901-19  
 PO#: PO595134

*Presite form: Please fill in data each month while processing MI's and Unit Invoices, and reviewing CURT and Quarterly reports. This form will then be used as a required tool for quarterly site visits in order to assist in observing the complete quarterly performance.*

**Compliance with Reporting Requirement:**

Unit Invoice MI CURT (page 40) Q & Y (page 59)	October				November				December			
	Due Date	Initial Date Received	Final Date Received	Days Past Due	Due Date	Initial Date Received	Final Date Received	Days Past Due	Due Date	Initial Date Received	Final Date Received	Days Past Due
	November 20, 2018	November 20, 2018	November 20, 2018	0	December 20, 2018	December 18, 2018	December 18, 2018	-2	January 20, 2019	January 16, 2019	January 16, 2019	-4
	November 20, 2018	November 20, 2018	November 20, 2018	0	December 20, 2018	December 18, 2018	December 18, 2018	-2	January 20, 2019	January 23, 2019	January 23, 2019	3
	November 30, 2018	December 3, 2018	December 3, 2018	3	December 30, 2018	December 18, 2018	December 18, 2018	-12	January 31, 2019	January 30, 2019	January 30, 2019	-1
									January 20, 2019	January 31, 2019	January 31, 2019	11

**Finance and Budget Management:**

Local/District Funds	FY19 NGA Amount	YTD Burn Rate	October			November			December			QUARTER 1	
			PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Average Burn Rate
Personnel	\$ 287,847.00	23.8%	\$ 30,005.97	\$ 257,841.03	10.4%	\$ 13,801.81	\$ 244,039.22	4.8%	\$ 24,668.19	\$ 219,371.03	8.6%	\$ 68,475.97	7.9%
Indirect Overhead	\$ 28,785.00	47.5%	\$ 3,000.60	\$ 25,784.40	10.4%	\$ 8,195.37	\$ 17,589.03	28.5%	\$ 2,466.82	\$ 15,122.21	8.6%	\$ 13,662.79	15.8%
Occupancy	\$ 16,000.00	9.4%	\$ 500.00	\$ 15,500.00	3.1%	\$ -	\$ 15,500.00	0.0%	\$ 1,000.00	\$ 14,500.00	6.3%	\$ 1,500.00	3.1%
Communication	\$ 805.00	21.7%	\$ 83.14	\$ 721.86	10.3%	\$ -	\$ 721.86	0.0%	\$ 91.48	\$ 630.38	11.4%	\$ 174.62	7.2%
Travel	\$ 17,000.00	11.0%	\$ 808.03	\$ 16,191.97	4.8%	\$ -	\$ 16,191.97	0.0%	\$ 1,055.80	\$ 15,136.17	6.2%	\$ 1,863.83	3.7%
Other Direct	\$ 397,328.00	10.5%	\$ 17,724.80	\$ 379,603.20	4.5%	\$ -	\$ 379,603.20	0.0%	\$ 23,872.80	\$ 355,730.40	6.0%	\$ 41,597.60	3.5%
Supplies	\$ 2,235.00	0.9%	\$ 19.95	\$ 2,215.05	0.9%	\$ -	\$ 2,215.05	0.0%	\$ -	\$ 2,215.05	0.0%	\$ 19.95	0.3%
	\$ 750,000.00	17%	\$ 52,142.49	\$ 697,857.51	7.0%	\$ 21,997.18	\$ 675,860.33	2.9%	\$ 53,155.09	\$ 622,705.24	7.1%	\$ 127,294.76	5.7%
<b>Total</b>	<b>\$ 750,000.00</b>	<b>24%</b>	<b>\$ 52,142.49</b>	<b>\$ 697,857.51</b>	<b>7.0%</b>	<b>\$21,997.18</b>	<b>\$ 675,860.33</b>	<b>2.9%</b>	<b>\$106,310.18</b>	<b>\$ 622,705.24</b>	<b>14.2%</b>	<b>\$ 127,294.76</b>	<b>8.0%</b>

**Program and Performance Progress:**

Performance Objective	YTD Progress Rate	October			November			December			QUARTER 1		
		Reported	Balance	Progress Rate	Reported	Balance	Progress Rate	Reported	Balance	Progress Rate	Reported	Average Progress Rate	
Unit: Dementia Navigator	1,500.0	43.1%	333.0	1,167.0	22.2%	154.5	1,012.5	10.3%	158.5	854.0	10.6%	646.0	14.4%
Unit: Money Management	1,600.0	33.5%	289.0	1,311.0	18.1%	124.5	1,186.5	7.8%	123.0	1,063.5	7.7%	536.5	11.2%
Unit: Club Memory	6,000.0	30.0%	998.3	5,001.7	16.6%	445.7	4,556.0	7.4%	355.9	4,200.1	5.9%	1799.9	10.0%

**List of issues to address during the site visit:** list issues that came up during the quarter, outlined in the CURT report, and important trends observed in the table above.

October CURT was late by 3 days due. Q&Y was 11 days late.

<i>Site Visit Notes on Compliance with Reporting Requirements:</i>	<i>Site Visit Notes on Finance and Budget Management:</i>	<i>Site Visit Notes on Program and Performance Progress</i>
<b>Finding:</b> Unit Invoice: Submitted on time; but the October Unit Invoice was submitted 14 days late.	<b>Finding:</b>	<b>Finding:</b>

M-1: Submitted on time		
CURT: Submitted 3 days late		
Unit Invoice: Submitted on time		
<b>Corrective Action:</b>		<b>Deficiencies:</b>
	<b>Deficiencies:</b>	
<b>Recommendations:</b>	<b>Recommendation:</b>	<b>Corrective Actions Planned:</b>

Score Card

	Assigned Weight	Raw Score (Points)		
Reporting	20%	20	0	Average Day Reports submitted past due date
Budget & Finance	30%	28	8.02%	Average Burn Rate
Program Progress	30%	25	7.1%	Average Progress Rate
Site Visit	20%	20	109%	Total Site Visit Score

Total Score (Points): 93 /100

**Final Notes:** Please write your overall evaluation of the site visit

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**Recommendation:**

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KEY:

REPORTING		BUDGET		PROGRAM		SITE VISIT	
Average days past due date	Score (1 point = 1 day)	Average Monthly Burn Rate	Score (1 point = 0.27%)	Average rate of obtaining objective/Progress Rate	Score (1 point = 0.27%)	Average Monthly Burn Rate	Score (1 point = 2%)
0	20	8.33%	30	8.33%	30	100%	20
1	19	8.05	29	8.05	29	98%	19
2	18	7.77	28	7.77	28	96%	18
3	17	7.50	27	7.50	27	94%	17
4	16	7.22	26	7.22	26	92%	16
5	15	6.94	25	6.94	25	90%	15
6	14	6.66	24	6.66	24	88%	14
7	13	6.39	23	6.39	23	86%	13
8	12	6.11	22	6.11	22	84%	12
9	11	5.83	21	5.83	21	82%	11
10	10	5.55	20	5.55	20	80%	10
11	9	5.28	19	5.28	19	78%	9
12	8	5.00	18	5.00	18	76%	8
13	7	4.72	17	4.72	17	74%	7
14	6	4.44	16	4.44	16	72%	6
15	5	4.17	15	4.17	15	70%	5
Above 15 days	0	Below 4.17%	0	Below 4.17%	0	Below 70%	0

**D.C. OFFICE ON AGING**  
**Attachment Q73-Grantee Quarterly Scorecards in FY19 for Legal Counsel for the Elderly**  
**PROGRAM AND GRANTS MONITORING CHECKLIST**  
**FY 2019**

**Grantee Name:** Legal Counsel for the Elderly **Grant Period:** 10/1/2018- 9/30/2019  
**Grant Title:** Legal Services **Total Grant Amount:** \$1,309,260.00  
**Grantee Address:** 601 E Street NW Washington DC 20049 **Local/District Grant Amount:** \$1,132,340.00  
**Grant Monitor Name:** Lynn Khoo/Maxine Crowder **Federal Grant Amount:** \$176,920.00

**Date of visit:** \_\_\_\_\_  
**Total Score for the visit:** 0 / 100  
**Grantee #** 0  
**PO#** po594399

*Presite form: Please fill in data each month while processing M1's and Unit Invoices, and reviewing CURT and Quarterly reports. This form will then be used as a required tool for quarterly site visits in order to assist in observing the complete quarterly performance.*

**Compliance with Reporting Requirement:**

	April				May				June			
	Due Date	Initial Date Received	Final Date Received	Days Past Due	Due Date	Initial Date Received	Final Date Received	Days Past Due	Due Date	Initial Date Received	Final Date Received	Days Past Due
Unit Invoice	May 20, 2019	May 20, 2019	May 20, 2019	0	June 20, 2019	June 20, 2019	June 20, 2019	0	July 20, 2019	July 22, 2019	July 22, 2019	2
M1	May 20, 2019	May 20, 2019	May 20, 2019	0	June 20, 2019	June 20, 2019	June 20, 2019	0	July 20, 2019	July 22, 2019	July 22, 2019	2
CURT (page 40)	May 31, 2019	May 31, 2019	May 31, 2019	0	June 30, 2019	June 30, 2019	July 1, 2019	1	July 30, 2019	July 31, 2019	July 31, 2019	1
Q & Y (page 59)									July 30, 2019	July 31, 2019	July 31, 2019	1

**Finance and Budget Management:**

Local/District Funds	FY18 NGA Amount	YTD PASS Receipt	YTD Burn Rate	April			May			June			QUARTER 3	
				PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Average Burn Rate
Legal Services	\$314,198.00	\$421,575.00	134.2%	\$41,204.00	\$64,754.00	13.1%	\$48,042.00	\$16,712.00	15.3%	\$124,089.00	-\$107,377.00	39.5%	\$213,335.00	22.6%
Ombudsman	\$268,036.00	\$132,301.00	49.4%	\$24,316.00	\$160,379.00	9.1%	\$24,644.00	\$135,735.00	9.2%		\$135,735.00		\$48,960.00	9.1%
Advocacy	\$88,215.00	\$61,387.00	69.6%	\$8,546.00	\$42,166.00	9.7%	\$15,338.00	\$26,828.00	17.4%		\$26,828.00		\$23,884.00	13.5%
Home Health	\$361,891.00	\$181,141.00	50.1%	\$28,879.00	\$216,052.00	8.0%	\$35,302.00	\$180,750.00	9.8%		\$180,750.00		\$64,181.00	8.9%
Legal Service Developer(IIIB)	\$60,532.00	\$23,528.00	38.9%	\$6,085.00	\$40,519.00	10.1%	\$3,515.00	\$37,004.00	5.8%		\$37,004.00		\$9,600.00	7.9%
Legal Services (IIIB)	\$37,038.00	\$0.00	0.0%		\$37,038.00			\$37,038.00			\$37,038.00			
Ombudsman VII	\$79,350.00													
LTCOPMED DHCF MOU	\$100,000.00			\$9,756.00			\$14,085.00							
	\$1,309,260.00	\$872,398.00	66.6%	\$118,786.00	\$560,908.00	9.1%	\$140,926.00	\$434,067.00	10.8%	\$124,089.00	\$309,978.00	9.5%	\$359,960.00	9.8%

Federal Funds	FY18 NGA Amount	YTD PASS Receipt	YTD Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Average Burn Rate
Personnel	\$1,306,448.00	\$383,800.97	29.4%	\$118,785.71	\$522,074.96	9.1%	\$140,926.17	\$381,148.79	10.8%	\$124,089.00	\$257,059.79	9.5%	\$383,800.88	9.8%
Travel	\$0.00	\$0.00	#DIV/0!		\$0.00			\$0.00			\$0.00			
Communications	\$0.00	\$0.00	#DIV/0!		\$0.00			\$0.00			\$0.00			
Equipment and Supplies	\$0.00	\$0.00	#DIV/0!		\$0.00			\$0.00			\$0.00			
Other Direct	\$2,813.00	\$0.00	0.0%		\$2,813.00			\$2,813.00			\$2,813.00			
	\$ 1,309,261.00	\$383,800.88	29.3%	\$ 118,785.71	\$524,887.96	9.1%	\$ 140,926.17	\$383,961.79	10.8%	\$ 124,089.00	\$259,872.79	9.5%	\$ 383,800.88	9.8%

<b>Total</b>	<b>\$2,618,521.00</b>	<b>\$1,256,198.88</b>	<b>61.1%</b>	<b>\$237,571.71</b>	<b>\$1,085,795.96</b>	<b>18.9%</b>	<b>\$281,852.17</b>	<b>\$818,028.79</b>	<b>22.4%</b>	<b>\$248,178.00</b>	<b>\$569,850.79</b>	<b>19.8%</b>	<b>\$743,760.88</b>	<b>20.4%</b>
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**Program and Performance Progress:**

Performance Objective	YTD Reported	YTD Progress Rate	April			May			June			QUARTER 3		
			Reported	Balance	Progress Rate	Reported	Balance	Progress Rate	Reported	Balance	Progress Rate	Reported	Average Progress Rate	
Legal Services Unit	8,737	8,257	95%	945	2,373	10.8%	868	1,505	9.9%	1,025	480	11.7%	2,838	10.8%
Legal Services Cases	0	0	#DIV/0!	0	0	#DIV/0!	0	0	#DIV/0!	0	0	#DIV/0!	0	
Legal Services Developer	660	947	143%	130	87	19.7%	192	-105	29.1%	182	-287	27.6%	504	25.5%
Legal Problems Handled	400	168	42%	16	307	4.0%	37	270	9.3%	38	232	9.5%	91	7.6%
	0	0	#DIV/0!		0			0			0		0	

**List of issues to address during the site visit:** *list issues that came up during the quarter, outlined in the CURT report, and important trends observed in the table above.*

*Site Visit 2 conducted by Lynn Khoo and Philip Hashey of DCOA. Marleise Pastore of LCE hosted the site review.*

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<i>Site Visit Notes on Compliance with Reporting Requirements:</i>		<i>Site Visit Notes on Finance and Budget Management:</i>		<i>Site Visit Notes on Program and Performance Progress</i>	
Finding:		Finding:		Finding:	
Deficiencies:		Deficiencies:		Deficiencies:	
Corrective Actions Planned:		Corrective Actions Planned:		Corrective Actions Planned:	

**Score Card**

	Assigned Weight	Raw Score (Points)		
Reporting	20%	19	1	Average Day Reports submitted past due date
Budget & Finance	30%	30	20.37%	Average Burn Rate
Program Progress	30%	30	14.6%	Average Progress Rate

Total Score (Points): 79 /80

**Final Notes:** Please write your overall evaluation of the site visit

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KEY:

REPORTING		BUDGET		PROGRAM	
Average days past due date	Score (1 point = 1 day)	Average Monthly Burn Rate	Score (1 point = 0.27%)	Average rate of obtaining objective/ Progress Rate	Score (1 point = 0.27%)
0	20	8.33%	30	8.33%	30
1	19	8.05	29	8.05	29
2	18	7.77	28	7.77	28
3	17	7.50	27	7.50	27
4	16	7.22	26	7.22	26
5	15	6.94	25	6.94	25
6	14	6.66	24	6.66	24
7	13	6.39	23	6.39	23
8	12	6.11	22	6.11	22
9	11	5.83	21	5.83	21
10	10	5.55	20	5.55	20
11	9	5.28	19	5.28	19
12	8	5.00	18	5.00	18
13	7	4.72	17	4.72	17
14	6	4.44	16	4.44	16
15	5	4.17	15	4.17	15
Above 15 days	0	Below 4.17%	0	Below 4.17%	0

**D.C. OFFICE ON AGING  
ATTACHMENT Q73 - GRANTEE QUARTERLY SCORECARDS IN FY19 FOR DOWNTOWN CLUSTER'S  
PROGRAM AND GRANTS MONITORING CHECKLIST  
FY 2019**

Grantee Name: Downtown Cluster's  
 Grant Title: Geriatric Day Care Center  
 Grantee Address: 926 11th Street, NW  
 Grant Monitor Name: Jennifer Adu

Grant Period: FY19: 10/1/18 - 9/30/19  
 Total Grant Amount: 770538  
 Local/District Grant Amount: 726662  
 Federal Grant Amount: 43876

Date of visit: \_\_\_\_\_  
 Total Score for the visit: 0 / 100  
 Grantee #: DTC006-19  
 PO#: 594194

**Presite form:** Please fill in data each month while processing M1's and Unit Invoices, and reviewing CURT and Quarterly reports. This form will then be used as a required tool for quarterly site visits in order to assist in observing the complete quarterly performance.

**Compliance with Reporting Requirement:**

	July				August				September			
	Due Date	Initial Date Received	Final Date Received	Days Past Due	Due Date	Initial Date Received	Final Date Received	Days Past Due	Due Date	Initial Date Received	Final Date Received	Days Past Due
Unit Invoice	August 15, 2019	August 13, 2019	August 13, 2019	-2	September 14, 2019	September 11, 2019	September 11, 2019	-3	October 10, 2019	October 8, 2019	October 8, 2019	-2
M1	August 21, 2019	August 13, 2019	August 14, 2019	-7	September 20, 2019	September 11, 2019	September 11, 2019	-9	October 10, 2019	October 8, 2019	October 8, 2019	-2
CURT (page 40)	August 31, 2019	August 30, 2019	August 30, 2019	-1	September 28, 2019	September 27, 2019	September 27, 2019	-1	October 18, 2019	October 18, 2019	October 18, 2019	0
Q & Y (page 59)									October 10, 2019	October 9, 2019	October 9, 2019	-1

**Finance and Budget Management:**

Local/District Funds	FY19 NGA Amount	YTD PASS Receipt	YTD Burn Rate	July			August			September			QUARTER 4	
				PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Average Burn Rate
Personnel	\$456,823.00	\$457,107.82	100.1%	\$45,447.08	\$69,559.83	9.9%	\$41,435.50	\$28,124.33	9.1%	\$28,409.15	-\$284.82	6.2%	\$115,291.73	8.4%
Travel	\$150.00	\$0.00	0.0%	\$0.00	\$150.00	0.0%	\$0.00	\$150.00	0.0%	\$0.00	\$150.00	0.0%	\$0.00	0.0%
Occupancy	\$113,976.00	\$114,036.00	100.1%	\$9,508.00	\$19,016.00	8.3%	\$9,538.00	\$9,478.00	8.4%	\$9,538.00	-\$60.00	8.4%	\$28,584.00	8.4%
Communication	\$5,000.00	\$5,000.00	100.0%	\$476.29	\$236.72	9.5%	\$236.72	\$0.00	4.7%	\$0.00	\$0.00	0.0%	\$713.01	4.8%
Supplies/Equipments	\$4,000.00	\$3,937.61	98.4%	\$330.79	\$692.10	8.3%	\$330.79	\$361.31	8.3%	\$298.92	\$62.39	7.5%	\$960.50	8.0%
Other Direct	\$56,100.00	\$56,099.72	100.0%	\$7,393.29	\$7,312.74	13.2%	\$5,992.46	\$1,320.28	10.7%	\$1,320.00	\$0.28	2.4%	\$14,705.75	8.7%
Indirect/ Overhead	\$134,489.00	\$134,356.94	0.0%	\$11,931.88	\$23,780.92	8.9%	\$13,420.77	\$10,360.15	10.0%	\$10,228.09	\$132.06	7.6%	\$35,580.74	8.8%
0	\$0.00	\$0.00	0.0%	\$0.00	\$0.00		\$0.00	\$0.00		\$0.00	\$0.00		\$0.00	
	\$770,538.00	\$770,538.09	100.0%	\$75,087.33	\$37,289.71	9.7%	\$70,954.24	\$0.00	9.2%	\$49,794.16	-\$0.09	6.5%	\$195,835.73	8.5%

Federal Funds	FY19 NGA Amount	YTD PASS Receipt	YTD Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Average Burn Rate
Extended Day Care Title-III B	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00	0.0%
Extended Day Care Title-III E	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00	\$0.00	0.0%	\$0.00	0.0%
0	\$0.00	\$0.00	0.0%		\$0.00			\$0.00		\$0.00	\$0.00	#DIV/0!		
0	\$0.00	\$0.00	0.0%		\$0.00			\$0.00			\$0.00			
\$	-	\$0.00	0.0%	\$ -	\$0.00	0.0%	\$ -	\$0.00	0.0%	\$ -	\$0.00	0.0%	\$ -	0.0%

<b>Total</b>	<b>\$770,538.00</b>	<b>\$770,538.09</b>	<b>100.0%</b>	<b>\$75,087.33</b>	<b>\$37,289.71</b>	<b>9.7%</b>	<b>\$70,954.24</b>	<b>\$0.00</b>	<b>9.2%</b>	<b>\$49,794.16</b>	<b>-\$0.09</b>	<b>6.5%</b>	<b>\$195,835.73</b>	<b>8.5%</b>
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**Program and Performance Progress:**

Performance Objective	YTD Reported	YTD Progress Rate	July			August			September			QUARTER 4		
			Reported	Balance	Progress Rate	Reported	Balance	Progress Rate	Reported	Balance	Progress Rate	Reported	Average Progress Rate	
Geriatric Day Care	33,000	34,693	105%	3,347	22,771	10.1%	3,700	19,071	11.2%	3,095	15,976	9.4%	10,141	10.2%
Health Promotion	12	24	200%	2	-7	12.5%	0	-7	0.0%	1	-8	4.2%	2	5.6%
Counseling	20	24	118%	1	9	5.0%	5	5	22.5%	1	4	2.5%	6	10.0%
Case Management	18	49	272%	0	-16	0.0%	3	-19	16.7%	3	-22	13.9%	6	10.2%
Comprehensive Assessment	12	10	83%	0	7	0.0%	0	7	0.0%	0	7	0.0%	0	0.0%

List of issues to address during the site visit: list issues that came up during the quarter, outlined in the CURT report, and important trends observed in the table above.

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<i>Site Visit Notes on Compliance with Reporting Requirements:</i>		<i>Site Visit Notes on Finance and Budget Management:</i>		<i>Site Visit Notes on Program and Performance Progress</i>	
<b>Finding:</b>		<b>Finding:</b>		<b>Finding:</b>	
				<b>Corrective Action Planned:</b>	
<b>Corrective Actions Planned:</b>		<b>Recommendations:</b>			

**Score Card**

	Assigned Weight	Raw Score (Points)		
Reporting	20%	20	-3	Average Day Reports submitted past due date
Budget & Finance	30%	30	8.47%	Average Burn Rate
Program Progress	30%	0	0.0%	Average Progress Rate
Site Visit	20%	0	0%	Total Site Visit Score

Total Score (Points): 0 /100

**Final Notes:** *Please write your overall evaluation of the site visit*

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**Findings:**

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KEY:

REPORTING		BUDGET		PROGRAM		SITE VISIT	
Average days past due date	Score (1 point = 1 day)	Average Monthly Burn Rate	Score (1 point = 0.27%)	Average rate of obtaining objective/ Progress Rate	Score (1 point = 0.27%)	Average Monthly Burn Rate	Score (1 point = 2%)
0	20	8.33%	30	8.33%	30	100%	20
1	19	8.05	29	8.05	29	98%	19
2	18	7.77	28	7.77	28	96%	18
3	17	7.50	27	7.50	27	94%	17
4	16	7.22	26	7.22	26	92%	16
5	15	6.94	25	6.94	25	90%	15
6	14	6.66	24	6.66	24	88%	14
7	13	6.39	23	6.39	23	86%	13
8	12	6.11	22	6.11	22	84%	12
9	11	5.83	21	5.83	21	82%	11
10	10	5.55	20	5.55	20	80%	10
11	9	5.28	19	5.28	19	78%	9
12	8	5.00	18	5.00	18	76%	8
13	7	4.72	17	4.72	17	74%	7
14	6	4.44	16	4.44	16	72%	6
15	5	4.17	15	4.17	15	70%	5
Above 15 days	0	Below 4.17%	0	Below 4.17%	0	Below 70%	0

**D.C. OFFICE ON AGING**  
**Attachment Q73-Grantee Quarterly Scorecards in FY 19 for UDC Bodywise/Respite Aide**  
**PROGRAM AND GRANTS MONITORING CHECKLIST**

<b>Grantee Name:</b> UDC	<b>Grant Period:</b> 10/1/2018 9/30/2019	<b>Date of visit:</b> _____
<b>Grant Title:</b> Bodywise Respite Aide Program	<b>Total Grant Amount:</b> 150,000	<b>Total Score for the visit:</b> 0 / 100
<b>Grantee Address:</b> 4200 Connecticut Ave NW	<b>Local/District Grant Amount:</b> 150,000	<b>Grantee #</b> 0
<b>Grant Monitor Name:</b> Asha Hamilton	<b>Federal Grant Amount:</b> 0	<b>PO#</b> PO601849

*Presite form: Please fill in data each month while processinging MI's and Unit Invoices, and reviewing CURT and Quarterly reports. This form will then be used as a required tool for quarterly site visits in order to assist in observing the complete quarterly performance.*

**Compliance with Reporting Requirement:**

Unit Invoice  
MI  
CURT (page 40)  
Q & Y (page 59)

July				August				September			
Due Date	Initial Date Received	Final Date Received	Days Past Due	Due Date	Initial Date Received	Final Date Received	Days Past Due	Due Date	Initial Date Received	Final Date Received	Days Past Due
August 15, 2019		August 22, 2019	7	September 15, 2019		September 26, 2019		October 12, 2019		October 18, 2019	
August 21, 2019		August 22, 2019		September 20, 2019		September 26, 2019		October 12, 2019	October 10, 2019	October 18, 2019	
August 30, 2019		September 5, 2019	37	September 30, 2019		December 5, 2019	66	October 31, 2019		December 5, 2019	35
								October 15, 2019			

**Finance and Budget Management:**

Local/District Funds	FY18 NGA Amount	YTD PASS Receipt	YTD Burn Rate	July			August			September			QUARTER 4	
				PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Balance	Burn Rate	PASS Receipt	Average Burn Rate
Respite Aide	\$112,821.00	\$76,344.75	67.7%	\$10,744.70	\$25,731.55	77.2%	\$9,974.98	\$15,756.57	86.0%	\$12,326.58	\$3,429.99	97.0%	\$109,391.01	86.7%
Bodywise	\$37,179.00	\$30,995.32	83.4%	\$1,705.00	\$4,478.68	88.0%	\$3,413.20	\$1,065.48	97.1%	\$1,554.60	-\$489.12	101.3%	\$37,668.12	95.5%
<b>Total</b>	<b>\$150,000.00</b>	<b>\$107,340.07</b>	<b>71.6%</b>	<b>\$12,449.70</b>	<b>\$30,210.23</b>	<b>79.9%</b>	<b>\$13,388.18</b>	<b>\$16,822.05</b>	<b>88.8%</b>	<b>\$13,881.18</b>	<b>\$2,940.87</b>		<b>\$37,668.12</b>	<b>84.3%</b>

**Program and Performance Progress:**

Performance Objective	YTD Reported	YTD Progress Rate	July			August			September			QUARTER 4		
			Reported	Balance	Progress Rate	Reported	Balance	Progress Rate	Reported	Balance	Progress Rate	Reported	Average Progress Rate	
Respite Aide Hours	38,584	0	0%	796	33,932	2.1%	0	33,932	0.0%	4	33,928	0.0%	800	0.7%
Bodywise Classes	936	0	0%	127	0	13.6%	359	-359	38.4%	90	-449	9.6%	576	20.5%

List of issues to address during the site visit: list issues that came up during the quarter, outlined in the CURT report, and important trends observed in the table above.

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*Site Visit Notes on Compliance with Reporting Requirements:*

*Site Visit Notes on Finance and Budget Management:*

*Site Visit Notes on Program and Performance Progress*

<b>Finding:</b>	<b>Finding:</b>	<b>Finding:</b>
<b>Deficiencies:</b>	<b>Deficiencies:</b>	<b>Deficiencies:</b>
<b>Corrective Actions Planned:</b>	<b>Corrective Actions Planned:</b>	<b>Corrective Actions Planned:</b>

**Score Card**

	Assigned Weight	Raw Score (Points)	
Reporting	20%	0	36
Budget & Finance	30%	30	84.32%
Program Progress	30%	30	10.6%
Site Visit	20%	#DIV/0!	#DIV/0!

Total Score (Points): #DIV/0! /100

**Final Notes:** Please write your overall evaluation of the site visit

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KEY:

REPORTING		BUDGET		PROGRAM		SITE VISIT	
Average days past due date	Score (1 point = 1 day)	Average Monthly Burn Rate	Score (1 point = 0.27%)	Average rate of obtaining objective/ Progress Rate	Score (1 point = 0.27%)	Average Monthly Burn Rate	Score (1 point = 2%)
0	20	8.33%	30	8.33%	30	100%	20
1	19	8.05	29	8.05	29	98%	19
2	18	7.77	28	7.77	28	96%	18
3	17	7.50	27	7.50	27	94%	17
4	16	7.22	26	7.22	26	92%	16
5	15	6.94	25	6.94	25	90%	15
6	14	6.66	24	6.66	24	88%	14
7	13	6.39	23	6.39	23	86%	13
8	12	6.11	22	6.11	22	84%	12
9	11	5.83	21	5.83	21	82%	11
10	10	5.55	20	5.55	20	80%	10
11	9	5.28	19	5.28	19	78%	9
12	8	5.00	18	5.00	18	76%	8
13	7	4.72	17	4.72	17	74%	7
14	6	4.44	16	4.44	16	72%	6
15	5	4.17	15	4.17	15	70%	5
Above 15 days	0	Below 4.17%	0	Below 4.17%	0	Below 70%	0







Site Visit Notes on Compliance with Reporting Requirements:

Site Visit Notes on Finance and Budget Management:

Site Visit Notes on Program and Performance Progress

Finding:	Finding:	Finding:
Deficiencies:	Deficiencies:	Deficiencies:
Corrective Actions Planned:	Corrective Actions Planned:	Corrective Actions Planned:

**Score Card**

	Assigned Weight	Raw Score (Points)	
Reporting	20%	0	24
Budget & Finance	30%	30	Average Day Reports submitted past due date
Program Progress	30%	#DIV/0!	Average Burn Rate
			Average Progress Rate

Total Score (Points):  /80

**Final Notes:** Please write your overall evaluation of the site visit

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KEY:

REPORTING		BUDGET		PROGRAM	
Average days past due date	Score (1 point = 1 day)	Average Monthly Burn Rate	Score (1 point = 0.27%)	Average rate of obtaining objective/Progress Rate	Score (1 point = 0.27%)
0	20	8.33%	30	8.33%	30
1	19	8.05	29	8.05	29
2	18	7.77	28	7.77	28
3	17	7.50	27	7.50	27
4	16	7.22	26	7.22	26
5	15	6.94	25	6.94	25
6	14	6.66	24	6.66	24
7	13	6.39	23	6.39	23
8	12	6.11	22	6.11	22
9	11	5.83	21	5.83	21
10	10	5.55	20	5.55	20
11	9	5.28	19	5.28	19
12	8	5.00	18	5.00	18
13	7	4.72	17	4.72	17
14	6	4.44	16	4.44	16
15	5	4.17	15	4.17	15
Above 15 days	0	Below 4.17%	0	Below 4.17%	0