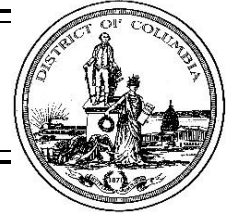

OFFICE OF AT-LARGE COUNCILMEMBER ANITA BONDS
CHAIR, COMMITTEE ON HOUSING & EXECUTIVE ADMINISTRATION



February 11, 2022

Beverly Perry, Senior Advisor
Office of the Senior Advisor
1350 Pennsylvania Ave NW, Suite 324
Washington, DC 20004

Dear Senior Advisor Perry:

The annual performance oversight hearing for the Office of the Senior Advisor is scheduled for **February 25, 2022, beginning at 9:00 AM in Zoom virtual platform**. 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. Pursuant to Council rule 522(a), we ask all executive witness(es) to submit their hearing testimony 48 hours in advance of their performance oversight hearing.

Written pre-hearing questions for your agency are attached. Please provide your electronic responses in Microsoft Word and PDF format **by no later than 5:00 PM on Friday, March 4, 2022**, one week after the hearing to account for the time constraints in between receiving these questions and the hearing date. Accordingly, please ensure that your written testimony thoroughly describes the agency's performance in FY 2021 and FY 2022 to date.

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 on any of the attached questions, please contact Aimellia Siemson at asiemson@dccouncil.us or (202) 724-8153. Thank you in advance for your timely and comprehensive response.

Thank you in advance for your timely and comprehensive response.

Sincerely,

A handwritten signature in black ink, appearing to read "ANITA BONDS".

Anita Bonds
At-Large Councilmember
Chairperson, Committee on Housing and Executive Administration

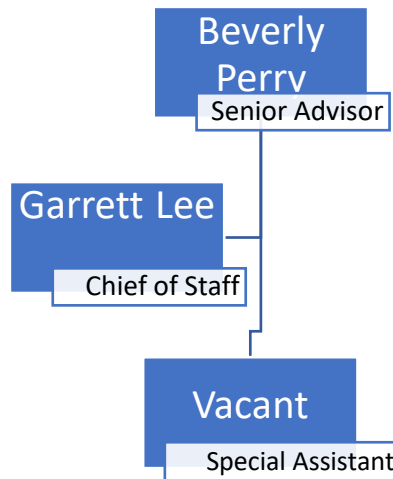
PERFORMANCE OVERSIGHT QUESTIONS

Standard Agency Questions

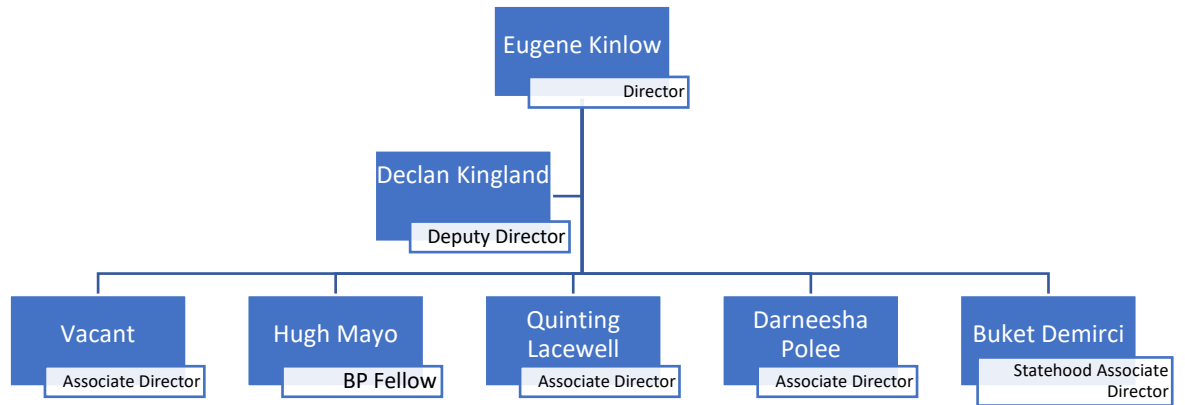
1. Please provide a current organizational chart for the agency, including the number of vacant, frozen, and filled positions in each division or subdivision. Include the names and titles of all senior personnel and note the date that the information was collected on the chart.
 - a. Please provide the number of divisions or bureaus within your agency, the number of staff in each division, the lead personnel of each division and their contact information, and the lead personnel's tenure in that division.
 - b. Please provide an explanation of the roles and responsibilities of each division and subdivision.
 - c. Please provide a narrative explanation of any changes to the organizational chart made during the previous year.

Response:

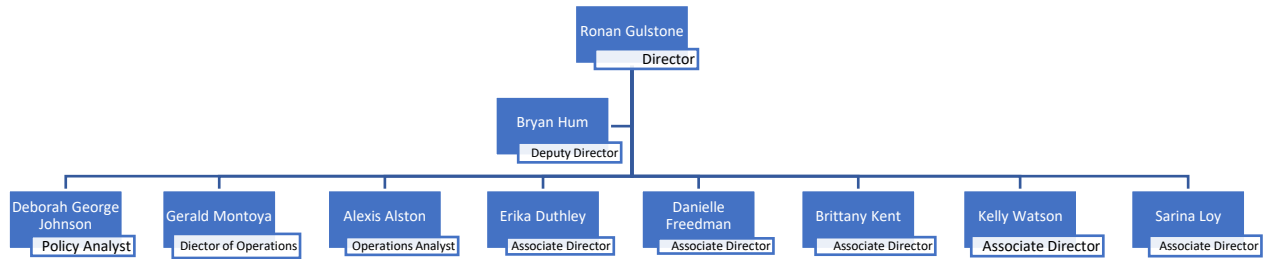
See Attachments 1-3 below for organizational charts.
Attachment 1: Office of the Senior Advisor



Attachment 2: Office of Federal and Regional Affairs Organizational Chart



Attachment 3: Office of Policy and Legislative Affairs



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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.

Response:

Office of Senior Advisor - Schedule A as of 02/15/2022

| Vac Stat | Prgm Code | Activity | Name | Title | Hire Date | Reg/Temp/Term | FTE | Salary | Fringe Benefit |
|--------------------|-----------|----------|--------------------------|--------------------------------|------------|---------------|-----------|------------------|----------------|
| F | 1090 | 1090 | Perry,Beverly Lee | Senior Advisor | 1/2/2015 | Reg | 1 | 221,677 | 37,463 |
| F | 1090 | 1090 | LEE,GARRETT L | Chief of Staff | 10/15/2019 | Reg | 1 | 126,932 | 21,452 |
| F | 3001 | 3001 | Lacewell,Quinting | Associate Director | 10/21/2019 | Reg | 1 | 96,364 | 16,285 |
| F | 3001 | 3001 | Kingland,Declan Leo | Deputy Director | 1/22/2018 | Reg | 1 | 126,932 | 21,452 |
| F | 3001 | 3001 | Polee,Darneesha R | Associate Director | 3/11/2019 | Reg | 1 | 96,364 | 16,285 |
| F | 3001 | 3001 | Kinlow,Eugene D. | Director, Federal and Regional | 11/16/2015 | Reg | 1 | 147,794 | 24,977 |
| F | 3001 | 3001 | Mayo,Hugh | Beverly Perry Fellow | 9/7/2021 | Term | 1 | 77,649 | 13,123 |
| F | 3001 | 3001 | Demirci,Buket | Associate Director | 5/11/2020 | Reg | 1 | 92,098 | 15,565 |
| F | 2001 | 2001 | George,Deborah A | Policy Analyst | 1/24/2011 | Reg | 1 | 96,364 | 16,285 |
| F | 2001 | 2001 | Gulstone,Ronan J | Dir, Pol & Legislative Affairs | 12/16/2019 | Reg | 1 | 171,870 | 29,046 |
| F | 2001 | 2001 | Watson,Kelly E | Associate Director of Legislat | 1/8/2018 | Reg | 1 | 96,416 | 16,294 |
| F | 2001 | 2001 | Alston,Alexis P | Administrative Support Special | 3/4/2013 | Reg | 1 | 77,641 | 13,121 |
| F | 2001 | 2001 | Loy,Sarina | Associate Director of Legislat | 10/12/2004 | Reg | 1 | 96,416 | 16,294 |
| F | 2001 | 2001 | Hum,Bryan Andrew | Deputy Director | 9/17/2018 | Reg | 1 | 115,393 | 19,501 |
| F | 2001 | 2001 | Kent,Brittany R | Associate Director | 10/28/2019 | Reg | 1 | 96,416 | 16,294 |
| F | 2001 | 2001 | Montoya,Gerald Samuel | Director of Operations | 9/8/2014 | Reg | 1 | 77,642 | 13,121 |
| F | 2001 | 2001 | Freedman,Danielle Nicole | Associate Director of Legislat | 2/25/2019 | Reg | 1 | 96,416 | 16,294 |
| F | 2001 | 2001 | Duthely,Erika K | Associate Director of Legislat | 4/15/2019 | Reg | 1 | 96,364 | 16,285 |
| V | 1090 | 1090 | (blank) | Special Assistant | (blank) | Reg | 1 | 79,972 | 13,515 |
| V | 3001 | 3001 | (blank) | Associate Director | (blank) | Reg | 1 | 91,169 | 15,408 |
| Grand Total | | | | | | | 20 | 2,177,889 | 368,063 |

- 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.

Response: No employee of the OSA, OFRA nor OPLA was detailed during the subject time period.

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 FY21 and FY22 to date;

| A10 Cellphones, Personal Digital Assistants Or Similar Communications Devices | | |
|--|------------------|---------------------|
| First Name | Last Name | Device Type |
| BEVERLY | PERRY | IPHONE XR |
| BRITTANY | KENT | IPHONE 7 |
| BRYAN | HUM | IPHONE 7 |
| QUINTING | IACEWELL | IPHONE XR |
| DANIELLE | FREEDMAN | IPHONE 6 |
| DEBORAH | GEORGE JOHNSON | IPHONE 7 |
| DECLAN | KINGLAND | IPHONE 8 |
| REEVES CENTER | KIOSK | 4GLTE SIM CARD PACK |
| EOM | ATC | IPAD PRO 9.7" |
| UNION STATION | KIOSK | 4GLTE SIM CARD PACK |
| CONVENTION CENTER | KIOSK | 4GLTE SIM CARD PACK |
| ERIKA | DUTHELY | IPHONE 7 |
| EUGENE | KINLOW | IPHONE 6 |
| GARRETT | LEE | IPAD 12.9 |
| GARRETT | LEE | IPHONE XR |
| GERALD | MONTOYA | IPHONE 6S |
| DARNEESHA POLEE | CHAPIN | IPHONE XR |
| KELLY | WATSON | IPHONE 6S |
| BUKET | DEMIRCI | IPHONE XR |
| ALEXIS | ALSTON | IPHONE 8 |
| RONAN | GULSTONE | IPHONE 8 |

b. A list of monthly costs for cell phones, tablets, and laptops.

| | | | | | | | |
|--------------|---------------|---------|------------------------------|-----------|----------|----------|----------|
| BEVERLY | PERRY | AT&T | Cellular | \$ 144.78 | \$ 48.26 | \$ 48.26 | \$ 48.26 |
| BRITTANY | KENT | Verizon | Cellular | \$ 128.97 | \$ 42.99 | \$ 42.99 | \$ 42.99 |
| BRYAN | HUM | AT&T | Cellular | \$ 144.78 | \$ 48.26 | \$ 48.26 | \$ 48.26 |
| CALVIN | OSBORNE | AT&T | Cellular | \$ 135.87 | \$ 45.29 | \$ 45.29 | \$ 45.29 |
| DANIELLE | FREEDMAN | AT&T | Cellular | \$ 144.78 | \$ 48.26 | \$ 48.26 | \$ 48.26 |
| DEBORAH | GEORGEJOHNSON | AT&T | Cellular | \$ 165.87 | \$ 55.29 | \$ 55.29 | \$ 55.29 |
| DECLAN | KINGLAND | Verizon | Cellular | \$ 128.97 | \$ 42.99 | \$ 42.99 | \$ 42.99 |
| DARNEESHA | POLEE | AT&T | Cellular | \$ 144.78 | \$ 48.26 | \$ 48.26 | \$ 48.26 |
| REEVESCENTER | KIOSK | Verizon | Cellular | \$ 89.97 | \$ 29.99 | \$ 29.99 | \$ 29.99 |
| SPARE | SPARE | Verizon | Tablet with wireless service | \$ 98.97 | \$ 32.99 | \$ 32.99 | \$ 32.99 |
| OSABURNER | PHONE1 | AT&T | Cellular | \$ 153.48 | \$ 51.16 | \$ 51.16 | \$ 51.16 |
| OSABURNER | PHONE2 | AT&T | Cellular | \$ 153.48 | \$ 51.16 | \$ 51.16 | \$ 51.16 |
| OSABURNER | PHONE3 | AT&T | Cellular | \$ 153.48 | \$ 51.16 | \$ 51.16 | \$ 51.16 |
| OSABURNER | PHONE5 | AT&T | Cellular | \$ 153.48 | \$ 51.16 | \$ 51.16 | \$ 51.16 |
| OSABURNER | PHONE6 | AT&T | Cellular | \$ 153.48 | \$ 51.16 | \$ 51.16 | \$ 51.16 |
| OSABURNER | PHONE8 | AT&T | Cellular | \$ 153.48 | \$ 51.16 | \$ 51.16 | \$ 51.16 |
| OSABURNER | PHONE7 | AT&T | Cellular | \$ 153.48 | \$ 51.16 | \$ 51.16 | \$ 51.16 |
| OSABURNER | PHONE9 | AT&T | Cellular | \$ 153.48 | \$ 51.16 | \$ 51.16 | \$ 51.16 |
| OSABURNER | PHONE10 | AT&T | Cellular | \$ 153.48 | \$ 51.16 | \$ 51.16 | \$ 51.16 |
| OSABURNER | PHONE11 | AT&T | Cellular | \$ 153.48 | \$ 51.16 | \$ 51.16 | \$ 51.16 |
| OSABURNER | PHONE12 | AT&T | Cellular | \$ 153.48 | \$ 51.16 | \$ 51.16 | \$ 51.16 |
| OSABURNER | PHONE14 | AT&T | Cellular | \$ 153.48 | \$ 51.16 | \$ 51.16 | \$ 51.16 |
| OSABURNER | PHONE15 | AT&T | Cellular | \$ 153.48 | \$ 51.16 | \$ 51.16 | \$ 51.16 |
| OSABURNER | PHONE13 | AT&T | Cellular | \$ 153.48 | \$ 51.16 | \$ 51.16 | \$ 51.16 |

| | | | | | | | |
|------------------|----------|---------|------------------------------|-----------|----------|------------|----------|
| OSABURNER | PHONE4 | AT&T | Cellular | \$ 153.48 | \$ 51.16 | \$ 51.16 | \$ 51.16 |
| SPARE | SPARE | AT&T | Cellular | \$ 135.87 | \$ 45.29 | \$ 45.29 | \$ 45.29 |
| UNIONSTATION | KIOSK | Verizon | Cellular | \$ 89.97 | \$ 29.99 | \$ 29.99 | \$ 29.99 |
| CONVENTIONCENTER | KIOSK | Verizon | Cellular | \$ 89.97 | \$ 29.99 | \$ 29.99 | \$ 29.99 |
| SPARE | SPARE | AT&T | Air-Card/ MiFi | \$ 74.13 | \$ 41.23 | \$ (8.77) | \$ 41.67 |
| KELLY | WATSON | AT&T | Air-Card/ MiFi | \$ 73.69 | \$ 41.23 | \$ (8.77) | \$ 41.23 |
| SPARE | SPARE | Verizon | Tablet with wireless service | \$ 98.97 | \$ 32.99 | \$ 32.99 | \$ 32.99 |
| BUKET | DEMIRCI | AT&T | Cellular | \$ 128.97 | \$ 42.99 | \$ 42.99 | \$ 42.99 |
| ERIKA | DUTHELY | AT&T | Cellular | \$ 144.78 | \$ 48.26 | \$ 48.26 | \$ 48.26 |
| EUGENE | KINLOW | AT&T | Cellular | \$ 146.42 | \$ 48.26 | \$ 48.26 | \$ 49.90 |
| GARRETT | LEE | Verizon | Cellular | \$ 89.97 | \$ 29.99 | \$ 29.99 | \$ 29.99 |
| GARRETT | LEE | AT&T | Cellular | \$ 144.78 | \$ 48.26 | \$ 48.26 | \$ 48.26 |
| GERALD | MONTOYA | AT&T | Cellular | \$ 144.78 | \$ 48.26 | \$ 48.26 | \$ 48.26 |
| SPARE | SPARE | AT&T | Cellular | \$ 144.78 | \$ 48.26 | \$ 48.26 | \$ 48.26 |
| SPARE | SPARE | AT&T | Cellular | \$ 135.87 | \$ 45.29 | \$ 45.29 | \$ 45.29 |
| ROBIN | RUBIN | AT&T | Cellular | \$ 144.78 | \$ 48.26 | \$ 48.26 | \$ 48.26 |
| RONAN | GULSTONE | AT&T | Cellular | \$ 144.78 | \$ 48.26 | \$ 48.26 | \$ 48.26 |
| RONAN | GULSTONE | AT&T | Cellular | \$ 111.69 | \$ 37.23 | \$ 37.23 | \$ 37.23 |
| SARINA | LOY | AT&T | Cellular | \$ 144.78 | \$ 48.26 | \$ 48.26 | \$ 48.26 |
| SPARE | SPARE | AT&T | Cellular | \$ 135.87 | \$ 45.29 | \$ 45.29 | \$ 45.29 |
| SPARE | SPARE | Verizon | Tablet with wireless service | \$ 98.97 | \$ 32.99 | \$ 32.99 | \$ 32.99 |
| Tristan | Kirkman | AT&T | Cellular | \$ 44.78 | \$ 48.26 | \$ (51.74) | \$ 48.26 |

- c. 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 FY21 and FY22 to date;

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

- d. A list of travel expenses, arranged by employee for FY21 and FY22 to date, including the justification for travel; and

Response: There are no travel expenses and reimbursements arranged by employee for FY21 and FY22 to date.

- e. A list of the total workers' compensation payments paid in FY21 and FY22 to date, including the number of employees who received workers' compensation payments, in what amounts, and for what reasons.

Response: There are no overtime and workman's compensation payments paid in FY21 and FY22 to date.

- 5. For FY21 and FY22 to date, please list all intra-District transfers to or from the agency.

Office of Senior Advisor - Intradistrict Transfers

| Buyer Agency | Seller Agency | Services Description | FY 2021 | FY 2022 |
|--------------|---------------|----------------------|---------------|---------------|
| AIO | OCP | PCard | 63,826 | 16,617 |
| AIO | OCTO/OFRM | Telecommunication | 4 | 110 |
| Total | | | 63,830 | 16,727 |

- 6. For FY21 and FY22 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:
 - a. The revenue source name and code;
 - b. The source of funding;
 - c. A description of the program that generates the funds;
 - d. The amount of funds generated by each source or program;
 - e. Expenditures of funds, including the purpose of each expenditure; and
 - f. The current fund balances.

Response: Not applicable

- 7. Please list all memoranda of understanding ("MOU") entered by your agency during FY21 and FY22 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.

Response: Not applicable

8. 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 FY21 and FY22 to date.

Response: The Office of Federal and Regional Affairs (OFRA) represents the City with counterparts in others states especially in Maryland and Virginia as well as all federal agencies including the White House, US Conference of Mayors, National Governors Association and National League of Cities.

9. 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, FY21, and FY22 to date.
- 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).

| Office of Senior Advisor - Budget versus Actual | | | | | | | | | | |
|---|---------|-----------------|----------|----------------|----------------|------------------|------------------|------------------|----------------|--|
| FISCAL_YEAR | Program | Program Title | Activity | Activity Title | Funding Source | Approved Budget | Revised Budget | Actuals | Variance | Variance Explanation |
| 2019 | 1000 | AGENCY MANAGI | 1090 | PERFORMANCE I | 0100 | 493,867 | 589,271 | 520,987 | 68,284 | \$68 savings from NPS |
| 2019 | 2000 | OFFICE OF POLIC | 2001 | POLICY AND LEG | 0100 | 1,018,594 | 1,125,918 | 1,057,946 | 67,973 | \$38 savings from PS and \$29K savings from NPS |
| | 3000 | OFFICE OF FEDER | 3001 | FEDERAL AND R | 0100 | 1,706,161 | 2,130,888 | 1,954,074 | 176,814 | all surplus from NPS |
| 2019 Total | | | | | | 3,218,622 | 3,846,077 | 3,533,006 | 313,071 | |
| 2020 | 1000 | AGENCY MANAGI | 1090 | PERFORMANCE | 0100 | 489,362 | 489,362 | 443,937 | 45,425 | 5K from fringe benefit savings and \$20 savings from NPS |
| | 2000 | OFFICE OF POLIC | 2001 | POLICY AND LEG | 0100 | 1,366,507 | 1,271,682 | 1,283,827 | (12,146) | PS expenditures were higher than budget |
| | 3000 | OFFICE OF FEDER | 3001 | FEDERAL AND R | 0100 | 1,607,970 | 1,521,201 | 1,411,263 | 109,937 | \$41K from PS savings and \$68 savings from NPS |
| 2020 Total | | | | | | 3,463,838 | 3,282,244 | 3,139,028 | 143,216 | |
| 2021 | 1000 | AGENCY MANAGI | 1090 | PERFORMANCE I | 0100 | 694,404 | 662,041 | 639,918 | 22,123 | PS expenditures were lower than budget |
| | 2000 | OFFICE OF POLIC | 2001 | POLICY AND LEG | 0100 | 1,309,179 | 1,329,383 | 1,350,198 | (20,814) | PS expenditures were higher than budget |
| | 3000 | OFFICE OF FEDER | 3001 | FEDERAL AND RE | 0100 | 1,340,226 | 1,394,204 | 1,362,748 | 31,456 | PS expenditures were lower than budget |
| 2021 Total | | | | | | 3,343,809 | 3,385,628 | 3,352,863 | 32,765 | |
| 2022 | 1000 | AGENCY MANAGI | 1090 | PERFORMANCE I | 0100 | 562,391 | 562,391 | 168,298 | | |
| | 2000 | OFFICE OF POLIC | 2001 | POLICY AND LEG | 0100 | 1,234,062 | 1,234,062 | 426,121 | | |
| | 3000 | OFFICE OF FEDER | 3001 | FEDERAL AND RE | 0100 | 1,612,866 | 1,612,866 | 609,246 | | |
| 2022 Total | | | | | | 3,409,318 | 3,409,318 | 1,203,665 | | |

- b. Include any over- or under-spending, explain any variances between fiscal year appropriations and actual expenditures for FY21 and FY22 for each program and activity code.

Response: Not applicable

- c. Attach the cost allocation plans for FY21 and FY22.

- d. In FY21 or FY22, 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.

Response: Not applicable

10. Please provide as an attachment a chart showing the agency’s overall funding by source and program for FY21 and FY22 to date. Please breakdown into the following:
- Name and amount of federal source of funding agency and program, broken down in percentage (%) and dollar amount (\$).
 - Name and amount of local source of funding agency and program, broken down in percentage (%) and dollar amount (\$).
 - Identify whether each funding source is recurring or one-time.
 - Identify whether recurring funds fluctuate in amount, the range of fluctuations, and why.

| Office of Senior Advisor - Budget by Funding Source | | | | | | | | | |
|---|----------------|---------|------------------------|----------|------------------------|------------------|------------------|----------------|-----------------------|
| FISCAL_YEAR | Funding Source | Program | Program Title | Activity | Activity Title | Approved Budget | % Federal Source | % Local Source | Recurring or one-time |
| 2021 | 0100 | 1000 | AGENCY MANAGEMENT | 1090 | PERFORMANCE MANAGEMENT | 694,404 | 0 | 100% | Recurring |
| | 0100 | 2000 | POLICY AND LEGISLATIVE | 2001 | LEGISLATIVE AFFAIRS | 1,309,179 | 0 | 100% | Recurring |
| | 0100 | 3000 | FEDERAL AND REGIONAL | 3001 | REGIONAL AFFAIRS | 1,340,226 | 0 | 100% | Recurring |
| 2021 Total | | | | | | 3,343,809 | 0 | 100% | |
| 2022 | 0100 | 1000 | AGENCY MANAGEMENT | 1090 | PERFORMANCE MANAGEMENT | 562,391 | 0 | 100% | Recurring |
| | 0100 | 2000 | POLICY AND LEGISLATIVE | 2001 | LEGISLATIVE AFFAIRS | 1,234,062 | 0 | 100% | Recurring |
| | 0100 | 3000 | FEDERAL AND REGIONAL | 3001 | REGIONAL AFFAIRS | 1,612,866 | 0 | 100% | Recurring |
| 2022 Total | | | | | | 3,409,318 | 0 | 100% | |

11. Please provide the following information regarding capital projects:
- A list of all capital projects in the financial plan.
 - For FY19, FY20, FY21, and FY22 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.
 - An update on all capital projects planned for FY22, FY23, FY24, FY25, and FY26.
 - A description of whether the capital projects begun, in progress, or concluded in FY19, FY20, FY21, or FY22 to date, had an impact on the operating budget of the agency. If so, please provide an accounting of such impact.

Response: Not applicable to OSA, OFRA or OPLA. However, the Office of the Secretary contains the DC Archives capital project in its capital budget.

12. Please provide a list of all budget enhancement requests (including capital improvement needs) for FY20, FY21, FY22 to date. For each, include a description of the need and the amount of funding requested.

Response: OSA had Enhancements of two FTEs in the amount of \$215,930.00 in FY 2020 and no Enhancements in FY21 or FY22.

13. Please list, in chronological order, each reprogramming in FY21 and FY22 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 FY21 and FY22 to date. For each reprogramming, list the date, amount, rationale, and reprogramming number.

| Office of Senior Advisor - Reprogramming | | | | | | | |
|--|------------|----------------|------------------|---------------------------------|---------------------|-------------------|--|
| Fiscal Year | Date | Sending Agency | Receiving Agency | Comp Source Group | Decrease | Increase | Justification |
| | 03/04/2021 | OSA/AIO | OSA/AIO | 20 SUPPLIES AND MATERIALS | (20,000.00) | | to reprogram \$31,095.00 to The Office of the Senior Advisor to pay for a contract with the Group. |
| | | | | 31 TELECOMMUNICATIONS | (5,000.00) | | |
| | | | | 70 EQUIPMENT & EQUIPMENT RENTAL | (6,095.00) | | |
| | | | | 40 OTHER SERVICES AND CHARGES | | 31,095.00 | |
| 2021 | 04/09/2021 | OSA/AIO | OSA/AIO | 70 EQUIPMENT & EQUIPMENT RENTAL | (25,434.88) | | to reprogram \$25,434.88 in Local Funds for the laptop purchase for employees. |
| | | | | 40 OTHER SERVICES AND CHARGES | | 25,434.88 | |
| | 06/17/2021 | OSA/AIO | OSA/AIO | 11 REGULAR PAY - CONT FULL TIME | (70,000.00) | | to reprogram \$100,000 in Local Funds to implement a multipronged strategy to inform and educate diverse populations and policy makers about D.C. Statehood. |
| | | | | 20 SUPPLIES AND MATERIALS | (30,000.00) | | |
| | | | | 40 OTHER SERVICES AND CHARGES | | 100,000.00 | |
| 2021 TOTAL | | | | | (156,529.88) | 156,529.88 | |
| 2022 | 11/16/2021 | OSA/AIO | OSA/AIO | SUPPLIES AND MATERIALS | (35,000.00) | | to reprogram \$40,000 for the membership and subscription service fees. |
| | | | | EQUIPMENT & EQUIPMENT RENTAL | (5,000.00) | | |
| | | | | OTHER SERVICES AND CHARGES | | 40,000.00 | |
| 2022 TOTAL | | | | | (40,000.00) | 40,000.00 | |

14. Please list each grant or sub-grant received by your agency in FY21 and FY222 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?

Response: Not applicable

15. Please list each contract, procurement, and lease; entered-into, extended, and option years exercised by your agency during FY21 and FY22 to date. For each contract, please provide the following information, where applicable:
- The name of the contracting party;
 - The nature of the contract, including the end product or service;
 - The dollar amount of the contract, including amount budgeted and amount actually spent;
 - The term of the contract;
 - Whether the contract was competitively bid;
 - The name of the agency’s contract monitor and the results of any monitoring activity; and
 - The funding source.

Response:

| Name | Goods/Services | Amount | Contract Dates | FY | Fund Location |
|-------------------------|---|---------------|--------------------------|-------------------|----------------------|
| Octane LLC | Statehood Education campaigns | 554,100 | 05/29/2021 to 05/28/2021 | FY 2021 & FY 2022 | Local fund |
| | Statehood Education campaigns | 130,000 | 05/29/2021 to 09/30/2021 | FY 2021 | Local fund |
| | Statehood Education campaigns | 424,100 | 10/01/2021 to 05/28/2022 | FY 2022 | Local fund |
| Millennium Construction | Walk of Fame Medallion Installation at Carnegie Library | 51,800 | 07/24/2021 to 7/31/2021 | FY2021 | Local Fund |
| theGroup | Consulting Services | 190,00 | 10/14/2021 to 10/14/2022 | FY2022 | Local Fund |

16. 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.

Response: There are no lawsuits to which OSA is a party.

17. Please list all settlements entered into by the agency or by the District on behalf of the agency in FY21 or FY22 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.).

Response: Not applicable

18. Please list the administrative complaints or grievances that the agency received in FY21 and FY22 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 FY21 or FY22 to date, describe the resolution.

Response: Not applicable

19. Please describe the agency's procedures for reporting and investigating allegations of sexual harassment or misconduct committed by or against its employees. List and describe any allegations received by the agency in FY21 and FY22 to date, regardless of whether or not those allegations were resolved.

Response:

The Office of the Senior Advisor follows the procedures of Mayor's Order 2017-313 with respect to any sexual harassment allegation. In FY21 and FY22 there were no allegations of sexual harassment by or against members of the Office of the Senior Advisor Cluster.

20. 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 FY21 and FY22 to date.

Response: Not applicable

21. Please describe any spending pressures the agency experienced in FY21 and any anticipated spending pressures for the remainder of FY22. Include a description of the pressure and the estimated amount. If the spending pressure was in FY21, describe how it was resolved, and if the spending pressure is in FY22, describe any proposed solutions.

Response: Not applicable

22. Please provide a copy of the agency's FY21 performance plan. Please explain which performance plan objectives are completed in FY21 and whether they were completed on time and within budget. If they were not, please provide an explanation.

Response: Not applicable

23. Please provide a copy of your agency's FY22 performance plan as submitted to the Office of the City Administrator.

Response: Not applicable

24. Please provide the number of FOIA requests for FY21 and FY22 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.

Response: FOIA requests submitted to the OSA are processed through the EOM. The information requested has been provided to the Secretary of the Council in the District Government FY 2021 FOIA Report (attached).

25. Please provide a list of all studies, research papers, reports, and analyses that the agency prepared or contracted for during FY21 and FY22 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.

Response: Not applicable.

26. Provide a list of all publications, brochures and pamphlets prepared by or for the agency during FY21 and FY22 to date.

Response: The Statehood Group sponsored articles for educational outreach in:

- The Georgetowner
- Congressional Black Caucus
- The Informer
- Digital Media, social media ads and ad placements
- Maine and Arizona Outreach Campaigns (report attached)

27. Please separately list each employee whose salary was \$100,000 or more in FY21 and FY22 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.

| Office of the Senior Advisor - Employee with Salary over \$100,000.00 | | | | | | | | |
|---|------------|--------------------------------|---------|----------|----------------|----------------|----------|----------|
| Name | Position # | Title | Program | Activity | Salary | Fringe Benefit | Overtime | Bonus |
| Gulstone,Ronan J | 00046520 | Dir, Pol & Legislative Affairs | 2001 | 2001 | 171,870 | 29,046 | 0 | 0 |
| Hum,Bryan Andrew | 00088334 | Deputy Director | 2001 | 2001 | 115,393 | 19,501 | 0 | 0 |
| Kingland,Declan Leo | 00048620 | Deputy Director | 3001 | 3001 | 126,932 | 21,452 | 0 | 0 |
| Kinlow,Eugene D. | 00073609 | Director, Federal and Regional | 3001 | 3001 | 147,794 | 24,977 | 0 | 0 |
| LEE,GARRETT L | 00088192 | Chief of Staff | 1090 | 1090 | 126,932 | 21,452 | 0 | 0 |
| Perry,Beverly Lee | 00087624 | Senior Advisor | 1090 | 1090 | 221,677 | 37,463 | 0 | 0 |
| Grand Total | | | | | 910,598 | 153,891 | 0 | 0 |

28. Please list in descending order the top 25 overtime earners in your agency in FY21 and FY22 to date, if applicable. For each, state the employee's name, position number, position title, program, activity, salary, fringe, and the aggregate amount of overtime pay earned.

Response: Not applicable

29. For FY21 and FY22 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.

Response: Not applicable

30. 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.

Response: Not applicable

31. 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 FY21 or FY22 to date, if minutes were prepared. Please inform the Committee if the board or commission did not convene during any month.

Response:

New Columbia Statehood Commission
Charles Hamilton Houston Commission

The aforementioned Boards are staffed by the Office of the Senior Advisor because of the subject matters that they review. However, the Mayor's Office of Talent and Appointments manages the appointment and placement of talent on District of Columbia Boards, including those reporting to the OSA. Minutes of the NCSC meetings are attached.

32. 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.).

Response:

Financial Disclosure Reports: OSA is in compliance with reports due to BEGA under DC Code § 1-1162.24

FOIA Report: OSA is in compliance with the annual report required under D.C. Official Code § 2-538(a)

33. 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.

Response:

OSA encourages all employees to take courses offered by DCHR's Center for Learning and Development, and all OSA staff are current with mandatory trainings.

In addition to a HR-led team building/Leadership activity we had in December, a series of professional development courses have been made available to all OSA employees through DCHR.

34. 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?

Response:

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

Racial Equity Questions

1. In the context of your agency and its mission, what are three areas, programs, or initiatives where you see the most opportunity to address racial inequity?

Response: Statehood, Legislative and federal Affairs, and administrative and legislative Policy.

2. What are three metrics that your agency uses, or could use, to measure progress toward racial equity?

Response: Although we have no formal metrics, we would utilize equal representation in Congress as a measurement of progress towards racial equity. We also review and screen District legislation and polices for opportunities to measure and make progress.

3. Do you think there are any areas/programs where your department has had some success in building racial equity over the past year? Which areas/programs?

Response:

The Statehood educational program has increased national awareness regarding the inequities and injustice imposed on the residents of the District. Approximately 47% of the District's 712,000 residents are black, making the District a plurality black jurisdiction with no representation in Congress. We, as an agency, have developed campaigns to highlight these inequities as part of the Statehood campaign.

4. Consider the demographic data your department collects, tracks, and evaluates as (A) part of its operations and (B) as part of its performance plan:
 - a. Do you collect information on race and geographic area? If not, why not?

Response: Not applicable

5. What legal barriers (if any) do you face as an agency to advancing racial equity or better understanding racial inequity?

Response: Not applicable

6. In your FY22 budget as approved, are there specific programs or allocations that are specifically designed to address racial or economic inequities faced by District residents? In detail, please describe how these efforts address those inequities.

Response: Please see the answer to question number 3.

Agency-Specific Questions

1. Please detail all efforts made by your agency towards gaining Statehood for the District of Columbia, including interactions with D.C.'s Shadow Senators and Representative.

Response:

- The Office of the Senior Advisor and the Office of Federal and Regional Affairs (OFRA) is the lead advocate for Statehood for the District. The staff work includes meeting with, and communications with congressional offices. We use polling and scientific methodologies to create messages that citizens outside of the District of Columbia may be receptive to. This data is useful in creating public awareness products for targeted use locally, regionally, and throughout out the nation.
- Some of our products were developed to educate key constituencies including veterans, young people, taxpayers and senior citizens, and diverse communities.
- We utilized social media on a variety of platforms including Facebook, Instagram, the Statehood Website, YouTube, and other social engagement platforms to reach the largest possible audience.
- We have communicated with members of Congress and their staffs in an effort to answer their questions, educate them on the District’s history, and better share information about our disenfranchisement, specifically, our lack of local control and representation.
- We work with our Shadow Delegation to collect information and develop strategies to advance Statehood.

- a. How have these efforts and procedures changed during the COVID-19 public health emergency (PHE)?

Response:

As a result of the public health emergency, we shifted most communications to virtual engagements. Occasionally, we participated in conferences and meetings that required COVID testing for admission.

2. How has the PHE affected outreach and partnerships with local, regional, federal, and international parties? Please list unique hurdles for each level, if applicable.

Response:

As a result of the pandemic and the variants, almost all communications continue to be in the form of electronic and virtual platforms. In 2022, our coalition partners such as the US Conference of Mayors, the National League of Cities, the African American Mayors Association, and the Washington Metropolitan Council of Governments did start to have in-person events with limited attendees and in-person engagement. We continue to follow the Mayor’s guidance and monitor the current situation.

3. Please list the current priorities of the Office of Federal and Regional Affairs (OFRA).

Response:

OFRA’s main priorities include negotiations for the Federal Budget payment and advocating for the acquisition of Federal land.

In FY21, OFRA worked endlessly to regain the \$755 million the District was shortchanged in the CARES Act as well as to ensure that any other federal funding is distributed to the District equitably as a state. OFRA has also assisted in the District's response to the pandemic by working to engage our regional partners on priorities such as testing and vaccination allotments.

OFRA has engaged the Biden Administration communicating the District's priorities to the Office of the President to identify potential partnerships and shared opportunities.

Furthermore, OFRA is working to secure federally owned land for the District and successfully negotiated the agreement to open and operate Franklin Park, which re-opened in September 2021; and developing an annual Federal Payment justification plan that reflects the Mayor's vision and supports strategies that target federal programs that enhance the District's positioning and ensure that the District maximizes any opportunity for federal funding of projects and initiatives that can enhance the lives of District residents.

4. Please list all reports that the Office of Policy and Legislative Affairs (OPLA) has published in FY20, FY21, and FY22, to date.

Response: OPLA did not publish any reports in FY20–22.

5. Please list all rules that OPLA has published in FY20, FY21, and FY22, to date.

Response:

OPLA works with all Executive and independent agencies, as required, to process all emergency, proposed, and final rulemakings that are published. OPLA has not published any rulemakings pertaining to the function of the office. The Office of Documents and Administrative Issuances (ODAI), within the Office of the Secretary, is tasked with maintaining and publishing weekly editions of the D.C. Register—which contains notices of rulemakings.

6. Please provide the number of nominations OPLA has submitted to the Council in FY21 and FY22, to date.

Response: OPLA submitted approximately 200 nominations during FY21 and FY22, to date.

7. Please outline how your agency interfaces with the Executive Office of the Mayor, the District's deputy mayors, and the Office of the City Administrator, and how your office's role has evolved in recent months with changes to other senior leadership within the Executive Office of the Mayor. In particular, please highlight any specific new areas of responsibility that OFRA has assumed in response to the COVID pandemic.

Response:

The OSA engages with our partners in other parts of District government to advance the priorities of the Bowser Administration. During the COVID pandemic, OFRA has worked

to ensure that the District of Columbia received state level funding in all federal coronavirus appropriations. OFRA has also worked to engage federal agencies to ensure District agencies had relevant implementation guidance or notice of coronavirus grantmaking.

8. Please outline how your agency interfaces with Members of Congress and congressional leadership, including Delegate Holmes Norton, to advance District priorities at the federal level. Specifically, please describe recent engagement with regards to any pending or anticipated tranches of federal COVID relief.

Response:

OFRA engages frequently with members of Congress and their staff to evaluate news and facts relative to DC Government relief operations. We are in weekly contact with the offices of Delegate Eleanor Holmes Norton and Speaker Pelosi.

OFRA has been in contact with the Executive office of the President and participated in numerous calls designed to discuss how mayors, governors, municipalities, and counties are confronting the Covid pandemic. These calls are also opportunities to share our perspective on our local strategies, discuss federal actions and to engage with colleagues from other cities and states.

As the District moved through the Covid Relief process, we also were party to numerous conversations with the Executive office of the President, the Department of Treasury and the Office of Management and Budget (OMB) to clarify federal relief responses including timing of payment allocations and availability. Often these calls included leadership of the Health and Human Services, the Centers for Disease Control, the White House Office of Covid Response, and other federal agencies.

9. What recent measures have OSA taken to engage with the Biden Administration in order to secure guidance on how to best access and leverage any previously appropriated federal expenditures?

Response:

OSA has been in routine contact with the Department of Treasury on several occasions to offer suggestions on how the District of Columbia is different from other jurisdictions and how District payments need to be structured, calculated and timed differently from federal payments to other jurisdictions including territories.

10. Since January of 2022, what District of Columbia-specific priorities have OSA highlighted for our federal partners in response to emerging needs, such as COVID, opioid abuse, and gun violence?

Response:

Mayor Bower's plan is to utilize recovery funds to provide relief, recovery, and growth for residents and business across all of Washington, DC's eight wards. These investments focus on what the District knows to be the pillars of an equitable recovery: access to safe and affordable housing, high-quality job training, healthy neighborhoods, academic acceleration, increased access to quality childcare, programs to reduce violence, safe and accessible transportation options, and supports for businesses and residents hit hardest by the economic crisis.

The plan's priority initiatives include:

- COVID-19 Public Health Emergency Direct Response Costs;
- Economic Recovery for Residents and Businesses;
- Build and Preserve Affordable Housing;
- Learning Acceleration;
- Reduction of Healthcare Disparities;
- Gun Violence Prevention;
- Youth Safety; and
- Alternative 911 Response.