

GOVERNMENT OF THE DISTRICT OF COLUMBIA
Office of Planning



Responses to Questions for the
Agency Performance Oversight Hearing on FY 2021-2022

Anita Cozart

Interim Director, Office of Planning

Submission to

Committee of the Whole
Chairman Phil Mendelson

February 24, 2022

Committee of the Whole
John A. Wilson Building
1350 Pennsylvania Ave., NW
Washington, DC 20004

**Office of Planning
FY 21-22 Performance Oversight
Responses to Pre-Hearing Questions
February 24, 2022**

1. **Please provide, as an attachment to your answers, a current organizational chart for your agency with the number of vacant and filled FTEs marked in each box. Include the names of all senior personnel. Also include the effective date on the chart.**

Please see Attachment Q1.

2. **Please provide, as an attachment, a Schedule A for your agency which identifies all employees by title/position, current salary, fringe benefits, and program office as of January 31, 2022. The Schedule A also should indicate all vacant positions in the agency. Please do not include Social Security numbers.**

Please see Attachment Q2.

3. **Please list as of January 31, 2022 all employees detailed to or from your agency, if any, anytime this fiscal year (up to the date of your answer). 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 the detail began, and the employee's actual or projected date of return.**

Employees Detailed from Other Agency

Leonard Watson from DMPED
To serve as Community Outreach Specialist
March 18, 2020 - May 19, 2022

4. **(a) For fiscal year 2021, please list each employee whose salary was \$125,000 or more. For each employee listed provide the name, position title, salary, and amount of any overtime and any bonus pay.**

FY 2021

| Employee Name | Position Title | Salary | Overtime | Bonus Pay |
|-------------------------|------------------------------------|-----------|----------|-----------|
| Anna, Alemayehu M | IT SPECIALIST | \$149,496 | | |
| Bird, Melissa C | ASSOC DIR | \$143,664 | | |
| Brown-Roberts, Maxine H | DEV REVIEW SPEC | \$145,778 | | |
| Calkins, Kristin S | Community Planner (Transportation) | \$127,188 | | |
| Callcott, Stephen L | Senior Historic Preservation S | \$127,476 | | |
| Chandler, Jamie | Data Visualization Analyst | \$130,906 | | |
| Cochran, Stephen L | COMMUNITY PLANNER | \$149,496 | | |
| Cozart, Anita M | Dep Dir, Long Range Planning | \$154,815 | | |
| Crain, Deborah L | COMMUNITY PLANNER | \$145,778 | | |
| Dennee, Timothy J. | Historic Preservation Spec. | \$126,508 | | |
| Elliott, Brandice N | Development Review Spec | \$134,624 | | |
| Flores, Rogelio | Associate Director for Citywide | \$143,258 | | |
| Fothergill, Anne | DEV REVIEW SPEC | \$134,624 | | |
| Giefer, Edward T | Asst Dir Strategic Ops & Finance | \$145,851 | | |

| | | | | |
|--------------------------|--------------------------------|-----------|----------|--|
| Guerra, Nelly V | CHIEF OF STAFF | \$131,999 | | |
| Gyor, Stephen M | Lead Community Planner | \$130,906 | | |
| Hand, Ryan | COMMUNITY PLANNER | \$130,906 | | |
| Harp, Sandra F | Management Liaison Specialist | \$126,049 | | |
| Howerton, Leslye | Associate Director for Urban D | \$141,780 | | |
| Jesick, Matthew R | Development Review Specialist | \$126,508 | | |
| Kasongo, Evelyn D | COMMUNITY PLANNER | \$138,342 | \$192.78 | |
| Khan, Sakina H | Deputy Director for Citywide S | \$152,227 | | |
| Lawson, Joel | SENIOR DEV ZONING PLANNING | \$142,024 | | |
| Lewis, Charles A | HISTORIC PRESERVATION SPECIALI | \$145,778 | | |
| Lieb, David | ATTORNEY ADVISOR | \$174,737 | | |
| Maloney, David J | HISTORIC PRESERV PGM MGR | \$135,796 | | |
| Mordfin, Stephen J | DEV REVIEW SPEC | \$142,060 | | |
| Phillips, Joy E | ASSOC DIR STATE DATA CENTER | \$144,208 | | |
| Rodgers, Arthur H. | COMMUNITY PLANNER | \$142,060 | | |
| Shaheen, Christopher M | Lead Community Planner (Public | \$134,624 | | |
| Steingasser, Jennifer L. | Dep Dir, Dev Review | \$166,373 | | |
| Thomas, Karen M | DEV REVIEW SPEC | \$145,778 | | |
| Trueblood, Andrew T | DIR OF PLANNING | \$189,991 | | |
| Vitale, Elisa | Development Review Spec | \$134,624 | | |
| Waardenburg, Dennis S | Cartographer | \$126,508 | | |

(b) For fiscal year 2022, please list each employee whose salary is or was \$125,000 or more. For each employee listed provide the name, position title, salary, and amount of any overtime and any bonus pay as of the date of your response.

FY 2022*

| Employee Name | Position Title | Salary | Overtime | Bonus Pay |
|--------------------------|------------------------------------|-----------|----------|-----------|
| Anna, Alemayehu M | INFORMATION TECHNOLOGY SPECIAL | \$149,496 | | |
| Bird, Melissa C | ASSOC DIR | \$143,664 | | |
| Brown-Roberts, Maxine H | DEV REVIEW SPEC | \$145,778 | | |
| Calkins, Kristin S | Community Planner (Transportation) | \$127,188 | | |
| Callcott, Stephen L | Senior Historic Preservation S | \$127,476 | | |
| Chandler, Jamie | Data Visualization Analyst | \$130,906 | | |
| Cochran, Stephen L | COMMUNITY PLANNER | \$149,496 | | |
| Cozart, Anita M | DIR OF PLANNING | \$175,064 | | |
| Crain, Deborah L | COMMUNITY PLANNER | \$145,778 | | |
| Dennee, Timothy J. | Historic Preservation Spec. | \$126,508 | | |
| Elliott, Brandice N | Development Review Spec | \$134,624 | | |
| Flores, Rogelio | Associate Director for Citywide | \$143,258 | | |
| Fothergill, Anne | DEV REVIEW SPEC | \$134,624 | | |
| Giefer, Edward T | Asst Dir Strategic Ops & Finance | \$145,851 | | |
| Guerra, Nelly V | Chief of Staff | \$149,000 | | |
| Gyor, Stephen M | Lead Community Planner | \$130,906 | | |
| Hand, Ryan | COMMUNITY PLANNER | \$130,906 | | |
| Harp, Sandra F | Management Liaison Specialist | \$126,049 | | |
| Howerton, Leslye | Associate Director for Urban D | \$141,780 | | |
| Jesick, Matthew R | Development Review Specialist | \$126,508 | | |
| Khan, Sakina H | Deputy Director for Citywide S | \$152,227 | | |
| Lawson, Joel | SENIOR DEV ZONING PLANNING | \$142,024 | | |
| Lewis, Charles A | HISTORIC PRESERVATION SPECIALI | \$145,778 | | |
| Lieb, David | ATTORNEY ADVISOR | \$174,737 | | |
| Maloney, David J | HISTORIC PRESERV PGM MGR | \$143,943 | | |
| Mordfin, Stephen J | DEV REVIEW SPEC | \$142,060 | | |
| Phillips, Joy E | ASSOC DIR STATE DATA CENTER | \$144,208 | | |
| Rodgers, Arthur H. | COMMUNITY PLANNER | \$142,060 | | |
| Shaheen, Christopher M | Lead Community Planner (Public | \$134,624 | | |
| Steingasser, Jennifer L. | Dep Dir, Dev Review | \$166,373 | | |
| Thomas, Karen M | DEV REVIEW SPEC | \$145,778 | | |
| Vitale, Elisa | Development Review Spec | \$138,342 | | |

| | | | | |
|-----------------------|--------------|-----------|--|--|
| Waardenburg, Dennis S | Cartographer | \$126,508 | | |
|-----------------------|--------------|-----------|--|--|

Note: * - As of 2/1/22

5. **Please list, in descending order, the top 15 overtime earners in your agency for fiscal year 2021. For each, state the employee’s name, position or title, salary, and aggregate overtime pay.**

| Employee Name | Position Title | Salary | Overtime |
|--------------------|-------------------------------|-----------|----------|
| Ozberk, Erkin | Community Planner | \$110,768 | \$2,625 |
| Wilson, Valecia | Community Planner | \$104,472 | \$2,378 |
| Broderick, Faith A | Community Planner | \$90,500 | \$1,683 |
| ElGawish, Heba | Community Planner | \$101,324 | \$512 |
| Lambert, Rupert K | HP Inspector | \$88,787 | \$495 |
| Luthy, Edward W | Cartographer | \$110,768 | \$309 |
| Kasongo, Evelyn D | Community Planner | \$138,342 | \$193 |
| Sheriff, Tariq | Policy Analyst | \$77,722 | \$108 |
| Gould, Rishawna | Visual Information Specialist | \$113,916 | \$53 |

6. **For fiscal years 2021 and 2022 (as of January 31), please provide a list of employee bonuses or special award pay granted that identifies the employee receiving the bonus or special pay, the amount received, and the reason for the bonus or special pay.**

No employees received bonuses or special award pay in FY 2021 or in 2022 to date.

7. **For fiscal years 2021 and 2022 (as of January 31), please list each employee separated from the agency with separation pay. State the amount and number of weeks of pay. Also, for each, state the reason for the separation.**

No employee was separated from the agency with separation pay.

8. **For fiscal years 2020, 2021, and 2022 (as of January 31), please state the total number of employees receiving worker’s compensation payments.**

No employees received worker’s compensation in FY 2020, 2021, or 2022 to date.

9. **Please provide the name of each employee who was or is on administrative leave in fiscal years 2021 and 2022 (as of January 31). In addition, for each employee identified, please provide: (1) their position; (2) a brief description of the reason they were placed on leave; (3) the dates they were/are on administrative leave; (4) whether the leave was/is paid or unpaid; and (5) their current status (as of January 31, 2022).**

No employee was placed on paid administrative in FY 2021 or to date in FY 2022.

10. **For fiscal years 2021 and 2022 (as of January 31), please list, in chronological order, all intra-District transfers to or from the agency. Give the date, amount, and reason for the transfer.**

FY 2021

| OP IS THE BUYER | | |
|------------------|---|-----------|
| OCTO | Create "call tree" for OP phone lines (10/13/20) | \$1,000 |
| OZ | Broadcast and archive HPRB hearings (12/7/20) | \$6,883 |
| OCTO | Website for Upward Mobility program (8/30/21) | \$8,060 |
| OP IS THE SELLER | | |
| DDOT | Planning support for federal Historic Preservation requirements (10/1/20) | \$140,000 |
| DMPED | Software licensing for redistricting tool (6/11/21) | \$128,600 |

FY 2022*

| OP IS THE BUYER | | |
|------------------|---|-----------|
| OZ | Broadcast and archive HPRB hearings (10/1/21) | \$6,685 |
| OP IS THE SELLER | | |
| DDOT | Planning support for federal Historic Preservation requirements (10/1/21) | \$150,000 |

Note: * - Through 2/1/22

11. Please list, in chronological order, every reprogramming of funds into or out of the agency for fiscal years 2021 and 2022 (as of January 31). Include a "bottom line" that explains the revised final budget for your agency. For each reprogramming, list the reprogramming number (if submitted to the Council for approval), the date, the amount, and the rationale.

There were no reprogrammings into or out of the Office of Planning in FY 2021 or 2022.

12. Please list, in chronological order, every reprogramming within your agency during fiscal year 2022 to date. Also, include both known and anticipated intra-agency reprogrammings. For each, give the date, amount, and rationale.

There have been no reprogrammings within the Office of Planning in FY 2022.

13. For fiscal years 2021 and 2022 (as of January 31), please identify each special purpose revenue fund maintained by, used by, or available for use by your agency. For each fund identified, provide: (1) the revenue source name and code; (2) the source of funding; (3) a description of the programs that generates the funds; (4) the amount of funds generated annually by each source or program; and (5) expenditures of funds, including the purpose of each expenditure. For (4) and (5) give starting and ending balances. You may wish to present this information first as a list (for numbers 1-5) and then as separate tables for numbers 4 and 5.

Historic Landmark & Historic District Application Fees (O2001)

This is a non-lapsing revolving fund established within the General Fund of the District to pay the costs of repair work necessary to prevent demolition by neglect, or for the costs of carrying out any other historic preservation program consistent with the purposes of and pursuant to this act. Sources of funding are fees collected for historic landmark and historic district nominations, fees paid by developers for historic preservation mitigation (such as from

a builder for work done at a property without permission), and fees paid for violations on historic properties or other properties in historic districts.

| FY | Starting Bal + Revenue - Expenses = Ending Bal | Expenses detail | Description |
|--------|--|---|---|
| 2021 | \$40,851* + \$42,921 <u>- \$41,921</u> \$41,851 | \$9,956 \$4,695 \$19,245 \$2,500 <u>\$5,525</u> \$41,921 | <ul style="list-style-type: none"> Stipends to HPRB members Annual dues to preservation organization Historic preservation education and digital documentation project Mayor's Agent fee (J. Peter Byrne) Fee for streaming and archiving HPRB meetings online |
| 2022** | \$41,851 + \$7,374 <u>- \$6,534</u> \$42,691 | \$1,981 <u>\$4,553</u> \$6,534 | <ul style="list-style-type: none"> Stipends to HPRB members Transcription services for HPRB meetings and Mayor's Agent hearings |

Notes:

* - Starting balance reflects an FY 2020 sweep of \$127,039 from this account

** - Through 2/1/22

14. Please provide a table showing your agency's Council-approved original budget, revised budget (after reprogrammings, etc.) for fiscal years 2020, 2021, and the first quarter of 2022. In addition, please explain the variances between fiscal year appropriations and actual expenditures for fiscal years 2020 and 2021.

Please see Attachment Q14.

15. Please list all memoranda of understanding (MOU) either entered into by your agency or in effect during fiscal years 2021 and 2022 (as of January 31). For each, describe its purpose, indicate the date entered, and provide the actual or anticipated termination date.

| Buyer | Seller | Purpose | Amount |
|--------------|--------|---|-----------|
| 2021 | | | |
| DDOT | OP | Planning support for federal Historic Preservation requirements (10/1/20) | \$140,000 |
| OP | OZ | Broadcast and archive HPRB hearings (12/7/20 – 9/30/21) | \$6,883 |
| DMPED | OP | Software licensing for redistricting tool (6/11/21 - 9/30/21) | \$128,600 |
| 2022* | | | |
| DCRA | OP | DCRA to provide contract personnel to help fast-track plan review for historic preservation and public space (2/1/22 - 9/30/22) | -- |
| DDOT | OP | Planning support for federal Historic Preservation requirements (10/1/21 – 9/30/22) | \$150,000 |

| | | | |
|----|----|---|---------|
| OP | OZ | Broadcast and archive HPRB hearings (10/1/21 - 9/30/22) | \$6,685 |
|----|----|---|---------|

Note: * - Through 2/1/22

16. **D.C. Law requires the Mayor and the Chief Financial Officer to submit to the Council, simultaneously with a proposed budget submission, actual copies of all agency budget enhancements requests, such as the “Form B” for all District agencies (See D.C. Code § 47-318.05a). In order to help the Committee understand agency needs, and the cost of those needs for your agency, please provide, as an attachment to your answers, all budget enhancement requests submitted by your agency to the Mayor or Chief Financial Officer as part of the budget process for fiscal years 2020, 2021, and 2022.**

The Office of Planning works each year with the Mayor’s Office of Budget and Performance and the Deputy Mayor for Planning and Economic Development to develop our annual budget. The Mayor’s annual budget submission reflects these efforts.

17. **Please list all currently open capital projects for your agency (as of January 31st) including those projects that are managed or overseen by another agency or entity. Include a brief description of each, the total estimated cost, expenditures to date, the start and completion dates, and the current status of the project. Also, indicate which projects are experiencing delays and which require additional funding.**

| Name | Description | Total cost | Expenditures* |
|-----------------|--|------------|---------------|
| HP staff review | OP and DDOT have a multi-year intra-district agreement to support one OP Historic Preservation Specialist FTE to expedite review of DDOT projects and other transportation related tasks, including project coordination, technical assistance, and document review on matters relating to historic preservation, history, architectural history, and archaeology. DDOT funds this agreement with capital funds. | \$150,000 | \$44,367 |
| SW resiliency | OP and DDOT have an intra-District agreement for OP to procure consulting services for planning, design, and pre-construction drawings to rebuild infrastructure within the Southwest DC floodplain. DDOT funds this agreement with capital funds. | \$490,000 | \$0 |

Note: * - Through 2/1/22

18. **Please list all pending lawsuits that name your agency (or agency director in his or her official capacity) as a party. Please identify which cases on the list are lawsuits that potentially expose the city to significant liability in terms of money and/or change in practices. The Committee is not asking for your judgment as to the city’s liability; rather, we are asking about the extent of the claim. For those claims identified, please include an explanation about the issues for each case.**

The Office of Planning is not named as a party in any pending lawsuit. Two OP employees, The Interim Director and State Historic Preservation Officer, are named in their official capacity as defendants, along with Mayor Bowser and Historic Preservation Review Board Chair Marnique Heath, in *Dupont East Civic Action Association, et al. v. Muriel Bowser, et al.*, 2019 CA 004130

B (Super. Ct.) (dismissed), in which the plaintiffs sought judicial review and declaratory and injunctive relief related to the landmark boundary of the Scottish Rite Masonic Temple located on 16th Street, NW. The Superior Court's dismissal of that lawsuit is currently pending in DC Court of Appeals Case No. 20-CV-315. The lawsuit does not expose the city to significant liability in terms of money and/or change in practices.

The Interim Director is also named in her official capacity in a *Belt v. Bowser, et al.*, Superior Court Case No. CA 2021 01651, a lawsuit alleging procedural errors in the Comprehensive Plan Update and seeking to stop its implementation.

19. **(a) Please list and describe any investigations, studies, audits, or reports on your agency or any employee of your agency that were completed at any time in fiscal years 2021 or 2022 (as of January 31, 2022).**
(b) Please list and describe any ongoing investigations, audits, or reports of your agency or any employee of your agency.

OP understands that the Office of the Inspector General was at one time investigating OP's work on historic preservation issues at the Scottish Rite Masonic Temple site in Northwest Washington. OP understands that investigation has been closed but does not know as of when and OP has not received a report. OP knows of no ongoing investigations, studies, audits, or reports concerning OP or any of its employees.

20. **How many grievances have been filed by employees or labor unions against agency management? Please list each of them by year for fiscal years 2020, 2021, and 2022 (as of January 31). Give a brief description of each grievance, and the outcome as of January 31, 2022. Include on the chronological list any earlier grievance that is still pending in any judicial forum.**

OP did not have any grievances filed by employees or labor unions during this period.

21. **(a) Please describe the agency's procedures for investigating allegations of sexual harassment committed by or against its employees.**
(b) If different, please describe the agency's procedures for investigating allegations of misconduct.
(c) List chronologically and describe each allegation of sexual harassment and misconduct received by the agency in FY 2021 and FY 2022 (as of January 31) and the resolution of each as of the date of your answer.

OP follows the policy, guidance, and procedures outlined for District agencies that are outlined in the Mayor's Order 2017-313, dated December 18, 2017. OP did not receive any sexual harassment or misconduct allegations during FY 2021 or FY 2022, as of January 31.

22. **In table format, please list the following for fiscal years 2021 and 2022 (as of January 31) regarding the agency's use of SmartPay (credit) cards for agency purchases: (1) individuals**

(by name and title/position) authorized to use the cards; (2) purchase limits (per person, per day, etc.); and (3) total spent (by person and for the agency).

| <u>Cardholder</u> | <u>Limits</u> | <u>Spent FY 2021</u> | <u>Spent FY 2022*</u> |
|------------------------------------|-------------------------------------|--------------------------|---------------------------|
| Edward Giefer Assoc. Director | \$10,000 per day/\$20,000 per month | \$93,360.33 | \$16,985.77 |
| Rita Poindexter Staff Assistant | \$10,000 per day/\$20,000 per month | \$0.00 | \$0.00 |
| Total | | \$93,360.33 | \$16,985.77 |

Note: * - Through 1/31/22

23. Please provide a list of all procurements for goods or services for use by your agency over \$25,000 for fiscal years 2021 and 2022 (as of January 31, 2022). Give a brief explanation of each, including the name of the contractor, purpose of the contract, and the total dollar amount of the contract. Exclude from this answer purchase card (SmartPay) purchases.

| <u>Supplier</u> | <u>Description</u> | <u>Order Date</u> | <u>Amount</u> |
|----------------------------------|--|-----------------------|---------------|
| Seaberry Design | Graphic design services for Small Area Plans and the Comp Plan | 2/8/21 | \$80,428 |
| LINK Strategic Partners | Facilitation services for Small Area Plans | 2/11/21 | \$47,800 |
| Symmetra Design | Transportation modeling for Pennsylvania Ave SE | 3/18/21 | \$39,755 |
| Center for Urban & Racial Equity | Equity expertise for Small Area Plans | 4/7/21 | \$51,747 |
| ESRI | Redistricting software license and support | 7/14/21 | \$110,127 |
| ESRI | Redistricting software support | 10/27/21 | \$40,326 |
| LINK Strategic Partners | Facilitation and design services for Small Area Plans | 12/23/21 | \$159,960 |

Note: Through 2/1/2022

24. (a) Please describe how your agency manages and limits its mobile, voice, and data costs, including cellular phones and mobile devices.

OP pays for mobile phones for a limited number of employees with jobs that require immediate availability and/or frequent off-site communications. These employees have reviewed and signed the "DC Government Landline and Cell Phone User Agreement." OP's Agency Telephone Coordinator monitors the bills monthly for OP's mobile phone users.

(b) In table format (if the answer is more than 20 lines, then provide as an attachment) please provide the following information for fiscal years 2021 and 2022 (as of January 31), regarding your agency's use of cellular phones and mobile devices: (1) individuals (by name and title/position) authorized to carry and use such devices; (2) total annual expense (FY) for each individual's use; and (3) justification for such use (per person). If the list is more than 20 individuals, group the answer by program, giving the total number of FTEs for that program as well as the number of cellular phones and mobile devices.

| Name | Position | Expense | | Justification |
|----------------------|---|----------|----------|--|
| | | FY 2021 | FY 2022* | |
| Andrew Trueblood | Director (departed OP in December 2021) | \$653.55 | \$192.87 | Agency head; duties require frequent off-site meetings and ability to communicate immediately with the Mayor, Council, and others. |
| Anita Cozart | Interim Director | \$191.35 | \$77.98 | Agency head; duties require frequent off-site meetings and ability to communicate immediately with the Mayor, Council, and others. |
| Vivian Guerra | Chief of Staff | \$394.86 | \$165.90 | Reports to the Director; duties require immediate availability and frequent off-site communications. |
| Mekdy Alemayehu | Communications Officer | \$596.46 | \$145.00 | Reports to the Director; duties require immediate availability and frequent off-site communications. |
| Doris Benson | Budget Officer/OCFO | \$449.29 | \$77.98 | OP has agreed to pay these costs for our OCFO colleague. |
| Jennifer Steingasser | Deputy Director, Development Review and HP | \$449.29 | \$77.98 | Reports to the Director; duties require immediate availability and frequent off-site communications. |
| David Maloney | State Historic Preservation Officer | \$449.29 | \$77.98 | Duties require immediate availability and frequent off-site communications. |
| Joel Lawson | Assoc. Director, Development Review | \$449.29 | \$77.98 | Duties require immediate availability and frequent off-site communications. |
| Keith Lambert | Historic Preservation Inspector | \$449.29 | \$77.98 | Duties require substantial off-site work in the field. |
| Toni Cherry | Senior HP Inspector | \$465.29 | \$85.98 | Duties require substantial off-site work in the field. |
| Anthony Williams | Historic Preservation Inspector | \$449.29 | \$77.98 | Duties require substantial off-site work in the field. |
| Ona Balkus | DC Food Policy Director | \$449.29 | \$77.98 | Duties require immediate availability and frequent off-site communications. |
| Sakina Khan | Deputy Director, Citywide Policy & Analysis | \$449.29 | \$77.98 | Reports to the Director; duties require immediate availability and frequent off-site communications. |
| David Lieb | Senior Counsel | \$191.35 | \$77.98 | Reports to the Director; duties require immediate availability and frequent off-site communications. |
| Sandra Harp | HR Advisor | -- | \$62.38 | Duties require immediate availability and frequent off-site communications. |

| | | | | |
|-----------------|--|----------|----------|--|
| Samsung Tablets | | \$162.38 | \$123.69 | Five tablets used for in-the-field community engagement. |
|-----------------|--|----------|----------|--|

Note: * - Through 12/31/21. (OCTO has not posted more recent cost data.)

25. **(a) Does your agency have or use one or more government vehicle? If so, for fiscal years 2021 and 2022 (as of January 31), please list any vehicle the agency owns, leases, or has assigned to it. You may group the vehicles by category (e.g., 15 sedans, 33 pick-up trucks, three transport buses, etc.).**

OP leases two vehicles via the Department of Public Works: a Toyota Corolla and a Dodge Caravan.

(b) Please list all vehicle accidents involving your agency’s vehicles for fiscal years 2020, 2021, and 2022 (as of January 31). Provide: (1) a brief description of each accident; (2) the type of vehicle involved; (3) the name and title/position of the driver involved; (4) the justification for using such vehicle; (5) whether there was a finding of fault and, if so, who was determined to be at fault; and (6) what employee discipline resulted, if any.

There were no accidents involving OP’s fleet vehicles in the subject years.

26. **Please list every lawsuit against the agency that was settled or decided by a trial court in FY 2021 and FY 2022 to date. Briefly describe each and the sanction, if any.**

No case against the Office of Planning was settled or decided by a trial court in FY 2021 or FY 2022 to date.

27. **D.C. Law requires the Mayor to pay certain settlements and judgements from agency operating budgets if the settlement is less than \$10,000 or results from an incident within the last two years (see D.C. Code § 2-402(a)(3)). Please itemize each charge-back to your agency for a settlement or judgment pursuant to D.C. Code § 2-402.**

There have been no charge-backs.

28. **(a) D.C. Law prohibits chauffeurs, take-home vehicles, and the use of SUVs (see D.C. Code §§ 50-203 and 50-204). Is your agency in compliance with this law?**
(b) Please explain all exceptions, if any, and provide the following: (1) type of vehicle (make, model, year); (2) individuals (name/position) authorized to use the vehicle; (3) jurisdictional residence of the individual (e.g., Bowie, MD); and (4) justification for the chauffer or take-home status.

OP is in compliance with this law.

29. **In table format, please provide the following information for fiscal years 2021 and 2022 (as of January 31) regarding your agency’s authorization of employee travel: (1) each trip outside**

the region on official business or agency expense; (2) individuals (by name and title/position) who traveled outside the region; (3) total expense for each trip (per person, per trip, etc.); (4) what agency or entity paid for the trips; and (5) justification for the travel (per person and trip).

| Employee | Cost | Justification |
|------------------|-------|--|
| FY 2021 | | |
| Andrew Trueblood | \$435 | Attend meeting with New York City and other DC officials at Moynihan Train Hall, June 29, 2021 (New York City). |
| FY 2022* | | |
| Andrew Trueblood | \$0 | Attend Big City Planning Director's Institute, October 24-27, 2021 (Phoenix). The event covered the cost for the Director. |

Note: * - Through 1/31/22

30. Please provide and itemize, as of January 31, 2022, the current number of When Actually Employed (WAE), term, and contract personnel within your agency. If your agency employs WAE or term personnel, please provide, in table format, the name of each employee, position title, the length of his or her term or contract, the date on which he or she first started with your agency, and the date on which his or her current term expires.

The Office of Planning does not employ WAE employees. OP employs the following Term employees.

| Employee Name | Position Title | Length of Term | Start Date | Term Expires |
|-------------------|-------------------|----------------|------------|--------------|
| Shannon L. Ruffin | HR Specialist | FY 2022 | 1-03-2022 | 9-30-2022 |
| Wilton Oliver | Community Planner | FY 2022 | 1-18-2022 | 9-30-2022 |

31. What efforts has your agency made in the past year to increase transparency? Explain.

In the past year (FY 2021 through Q1 FY 2022), the Office of Planning has made the following efforts to increase transparency throughout the agency:

- **Communications Efforts:** OP uses a variety of communications efforts to share information about the activities and products of the office. In FY21, OP released 11 newsletters and 14 press releases through the planning.dc.gov website and GovDelivery, a web-based e-mail subscription management system, where OP has over 8,000 subscribers. OP is active on Twitter, where @OPinDC tweeted 245 times in FY21 and with 456,867 impressions. During FY21 @OPinDC garnered 23,708 profile visits and 603 new followers.
- **Community Engagement**
 - **Small Area Plans:** OP worked with three communities on small area plans: Chevy Chase, Congress Heights, and Pennsylvania Ave SE. Each plan involved significant community engagement to foster transparency and participation in the planning process. Methods included convening a Community Advisory Committee; holding Visioning Workshops, Community Walks, Open Houses, and Design Workshops; conducting online surveys; circulating project updates

via email newsletters; and participating in small group discussions and meetings.

- **Websites and Open Data**

- **Public Input:** Since FY20, OP has used the Public Input Platform as a central hub for community engagement efforts. Public Input allows for surveying, public discourse, recorded and live video conferencing, a dedicated project phone number, and email and text capabilities. Each OP neighborhood planning effort has a dedicated Public Input page that enables residents and stakeholders to track past and upcoming engagement opportunities and keep up to date on the plan.
- **Online Surveys:** OP conducted online surveys for several of its planning efforts to increase transparency and gather public input. Two such efforts included a Districtwide preservation survey to inform the 2025 Historic Preservation Plan and a survey on the draft Commemorative Works Location strategy.
- **Demographic Data Hub:** In October 2021, OP launched a refreshed [Demographic Data Hub](#). This site provides a one-stop-shop for the latest 2020 Census data at various geographic levels. The website includes interactive infographics, a geographic analysis section with maps, and datasets for download.
- **Redistricting:** OP provided strategic support for Council for the Ward Redistricting process. Part of this included procuring and providing training on an Esri Redistricting tool that enabled residents to submit proposed redistricting maps. Ultimately, residents submitted 220 maps for Council's consideration.
- **Historic Preservation:** OP requires electronic filing of project plans, which are then posted to the OP website. All cases going to the Historic Preservation Review Board and Old Georgetown Board are noticed, including concept reviews, landmark designations, and planning topics.

32. **What efforts will your agency be making to increase transparency? Explain.**

The Office of Planning will continue to make improvements to the services detailed above in question #31. In addition, OP will undertake the following actions in FY 2022 that focus on increasing transparency and public information:

- **Community Engagement:** OP will conduct community engagement for its ongoing neighborhood planning initiatives. The agency will continue to develop and apply a racial equity lens to community engagement strategies, in coordination with the Mayor's Office of Racial Equity. OP will hold neighborhood walks with community stakeholders and OP staff. OP will also continue to utilize the PublicInput platform to engage with the community and provide updates on planning initiatives.
- **Websites and Open Data:** OP will continue to identify opportunities to share information online. In FY22, OP will maintain its demographic data hub and the PropertyQuest and HistoryQuest platforms, as well as develop storymaps to present information about the District's history in an accessible manner.

- **Council Redistricting:** OP will support Council’s Redistricting Subcommittee with the Advisory Neighborhood Commission and Single-Member District redistricting process. OP will provide trainings on use of the Esri mapping tool, attend Ward task force meetings, and serve as a resource to answer task force questions on the mapping tool.
- **Language Access:** OP will continue to provide translation of documents and interpretation as needed for community meetings.

33. **Please identify any legislative requirements that your agency lacks sufficient resources to properly implement. Explain.**

There are no legislative requirements for which the agency lacks sufficient resources to fully implement.

34. **Please identify any statutory or regulatory impediments to your agency’s operations.**

There are no statutory or regulatory impediments to OP's operations.

35. **Did your agency receive any FOIA requests in fiscal year 2021? If yes, did the agency file a report of FOIA disclosure activities with the Secretary of the District of Columbia? If available, please provide a copy of that report as an attachment. Also state here the total cost incurred by your agency for each fiscal years 2020, 2021, and 2022 (through January 31) related to FOIA.**

Please see the Office of Planning’s Annual FOIA Report for Fiscal Year 2021 attached. Total cost incurred for FY 2020 was approximately \$5,600, FY 2021 \$5,250, and \$1,000 for FY 2022 through February 17.

36. **For CBE agency compliance purposes, what is your agency’s current adjusted expendable budget; how much has been spent with SBEs; and what percent of your agency’s expendable budget was spent with SBEs? Further, where SBEs were not available, how much has been spent with CBEs, and what percent of CBE spending, relative to your current expendable budget? How many CBE waivers (including dollar amount) did the agency submit? What efforts has the agency taken to reduce the number of CBE waivers submitted? What is the CBE spending goal for your agency per the DSLBD SBE Opportunities Guide (Green book)? Give this answer for fiscal years 2020, 2021 and 2022 (as of January 31).**

| | FY 2020 | FY 2021** | FY 2022*** |
|-----------------------------------|---------------------|-------------------|-------------------|
| Expendable budget | \$2,569,890* | \$758,502 | \$3,289,878 |
| Spent with SBEs (%) | \$1,289,567 (50.2%) | \$271,676 (35.8%) | \$0 |
| Spent with CBEs that are not SBEs | \$0 | \$0 | \$0 |
| Waivers submitted | 0 | 0 | 0 |
| Spending goal | \$1,284,945 | \$379,251 | \$1,644,939 |

Notes:

* Includes one-time funding to support Census 2020

** 4th quarter data not yet reported by DSLBD

*** 1st quarter data not yet reported by DSLBD

37. **Please provide, as an attachment, a copy of your agency’s current annual performance plan as submitted to the Office of the City Administrator.**

Please see the Office of Planning’s FY 2022 Performance Plan attached.

38. **(a) What are your agency’s key performance indicators and what has been your agency’s performance (for each of these KPIs) in fiscal year (or calendar year) 2020, 2021, and 2022 (through the first quarter).**

| KPI | FY 2020 | FY 2021 | FY 2022* |
|--|---------------------------|---------------------------|----------------------|
| % of GIS and State Data customers who have the data and analysis needed to fulfill their role in planning the city & influencing quality neighborhood outcomes | 98.1% | 98.2% | 99.5% |
| Satisfaction rating given by the Director of the Capital Improvements Program re: the consistency and quality of OP’s contribution | 100% | 100% | 100% |
| % of OP small area plans approved by the Council or other neighborhood plans supported by the relevant ANCs | [no plans submitted] | [no plans submitted] | [no plans submitted] |
| Satisfaction rating given by head of Public Space Commission re: the consistency and quality of OP’s contribution | 100% | 100% | 100% |
| % of stakeholder requests for planning assistance fulfilled | 100% | 98.6% | 100% |
| % of OP’s neighborhood plans that receive recognition from professional associations (APA, ULI, etc.) | [no applicable incidents] | [no applicable incidents] | [annual measure] |
| % of discretionary developments/projects initiated within neighborhood plan boundaries that are guided by OP’s small area or neighborhood plans | 100% | 100% | 100% |
| % of relevant ANCs that OP engages in small | [no applicable incidents] | 100% | 100% |

| KPI | FY 2020 | FY 2021 | FY 2022* |
|--|---------|---------|----------|
| area or neighborhood planning initiatives | | | |
| % of historic property permit applications reviewed over the counter | 98.1% | 97.6% | 98.0% |
| % of historic landmark designations without owner objection | 100% | 100% | 100% |
| % of DC government project reviews concluded with adverse effects resolved by consensus | 99.8% | 99.8% | 98.5% |
| % of Development Review reports that meet the expectations of boards/commissions | 94.2% | 92.4% | 93.5% |
| % of HP staff reports that meet the expectations of the HPRB Chair and the Mayor's Agent | 93.6% | 93.1% | 93.2% |
| Average cases reviewed per zoning review staff | 56.6 | 30 | 12.4 |
| Average cases reviewed per historic preservation staff. | 878.1 | 834.7 | 192.8 |
| % of PUDs that exceed minimum requirements to further the Sustainable DC plan including the provision of green roofs or other features to help reduce storm water runoff, electric car charging stations or bike share facilities. | 100% | 100% | 100% |
| % of historic preservation projects properly noticed after implementation of new regulations. | 92% | 86.4% | 100% |

Note: * - Through Q1

(b) What KPIs have been dropped (or changed) since 2020? List each specifically and explain why it was dropped or changed.

OP has not dropped or changed any KPIs in this time period.

39. **Please list each small area plan and all other comprehensive plan related plans (e.g. PDR Study) currently underway, give the current status, and provide the expected completion date.**

| Name | Status | Expected Completion Date |
|--|--|-------------------------------|
| Congress Heights Small Area Plan | Anticipated Public Draft Release Q2 FY22 | Submission to Council Q3 FY22 |
| Pennsylvania Avenue SE Small Area Plan | Anticipated Public Draft Release Q2 FY22 | Submission to Council Q3 FY22 |
| Chevy Chase Small Area Plan | Anticipated Public Draft Release Q3 FY22 | Submission to Council Q3 FY22 |
| Wisconsin Avenue Development Framework | In procurement. Public Kick-off in Q3 FY22. | Q3 FY23 |
| Connecticut Avenue Development Guidelines | In procurement. Public Kick-off in Q3 FY22. | Q2 FY23 |
| New York Avenue Vision Framework | In procurement. | Q3 FY23 |
| Ivy City Small Area Plan | OP is scoping plan and has conducted several listening sessions with community stakeholders. | Submission to Council Q1 FY24 |
| Deanwood Community Plan | OP is scoping plan and has conducted several listening sessions with community stakeholders. | Q1 FY24 |
| Production, Distribution, and Repair (PDR) Land Use Report | In procurement. | Q1 FY24 |

40. **(a) How much and what percentage of funds have been expended from the Historic Homeowner Grant Program for fiscal years 2020, 2021, and 2022 (as of January 31).**

| | Available | Expended |
|----------|-----------|-----------------|
| FY 2020 | \$414,419 | \$170,630 (42%) |
| FY 2021 | \$493,789 | \$157,231 (32%) |
| FY 2022* | \$586,558 | \$19,166 (3%) |

Notes: * - As of 1/31/2022. Have thus far committed more than \$310,000 in grants

In FY 2020 and FY 2021, conditions resulting from the COVID-19 pandemic delayed the Historic Homeowner Grant process from project awards to completion of construction. In FY 2021, the typical time for receiving contractor bids, selection, and completing a covenant agreement with grantees stretched to as much as four months from the time of award, and in two cases to nearly a year. The \$25,000 grant limit at a time of rapid construction cost inflation and problems with material delivery led to project delays, extended contract negotiations, increased contractor requests for change orders, revised grant awards, and outright deferral of four projects until 2022.

In FY 2021, OP also anticipated spending a significant amount in FY 2022 for the Kenesaw project and other awards and plans to use some of the FY 2021 carryover funds for that project. The initial \$224,000 award to sixteen Kenesaw homeowners is expected to increase significantly with awards to additional qualified homeowners, adjustment for inflationary cost increases, and an expanded scope of work.

(b) The FY 2022 Budget Support Act included a subtitle to allow for the Kenesaw cooperative/condominium in Mount Pleasant to apply for Historic Homeowner Grant Program assistance. What is the status of providing funds to this building?

On January 26, OP issued an initial group of awards to sixteen Kenesaw homeowners, totaling approximately \$224,000. OP is currently seeking to issue awards to four more homeowners who may qualify and complete the necessary application materials and certifications. OP is also considering additional information received from the condominium and coop associations, including a 20% cost increase for the balcony repairs to \$2.135 million and an additional cost estimate of \$1.547 million for cornice and other high-priority façade repairs. This information will necessitate adjustment of OP's awards. To use grant funds most effectively and prudently, OP also seeks to identify and prioritize the most urgent components of the work in order to ensure safety and forestall further building deterioration.

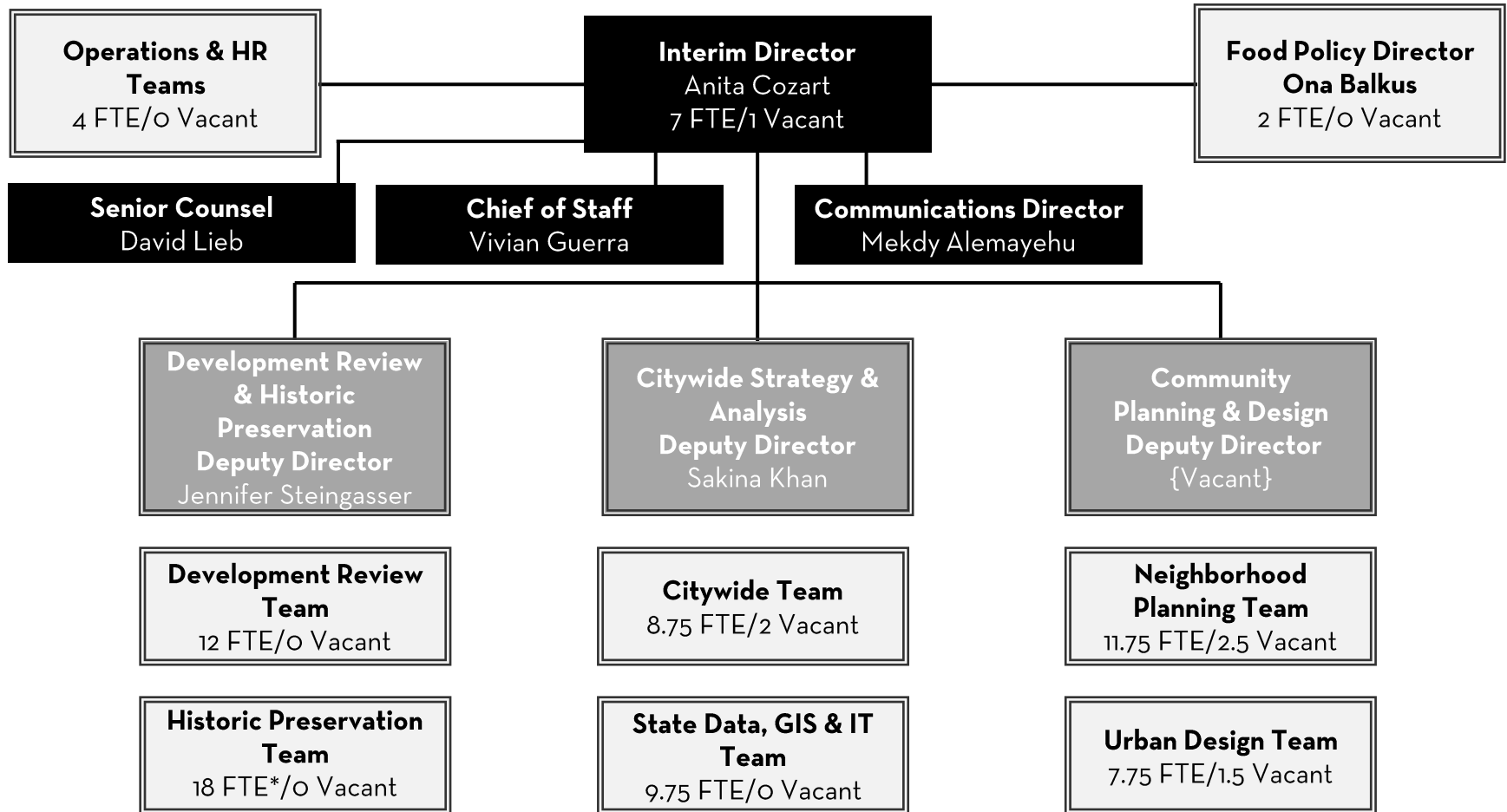
41. What are your top five priorities for the agency? Please provide a detailed explanation for how the agency expects to achieve or work toward these priorities.

OP's top priority is to implement the policies and actions in Mayor Bowser's Comprehensive Plan Update. In FY 2022, this includes the following priorities:

- 1. Approval of Small Area Plans:** In Q3 FY 2022, OP will submit three Small Area Plans to Council for approval: Congress Heights, Pennsylvania Ave SE, and Chevy Chase. OP will release public drafts for each plan, hold a mayoral hearing, and incorporate public comments ahead of Council submission. OP will work with Council as it reviews and approves each Small Area Plan.
- 2. Housing Equity:** OP will continue to further Mayor Bowser's housing goals through its FY22 neighborhood planning efforts, including the Wisconsin Avenue Development Framework, Connecticut Avenue Development Guidelines, New York Avenue Vision Framework, Ivy City Small Area Plan, and Deanwood Community Plan. Additionally, OP will continue to assess opportunities to amend the zoning regulations in alignment with the Comp Plan update to support the development of market rate and affordable housing.
- 3. Economic Vibrancy:** OP will continue to prioritize economic development and public space projects that support the District's recovery from COVID-19. Key initiatives to support this work include OP's neighborhood planning efforts, the Streets for People Initiative, and the Downtown Public Realm Recovery Plan.
- 4. Sustainability & Resilience:** OP has several projects that will enhance the District's sustainability and resilience, including the New York Avenue Vision Framework, Production Distribution and Repair Land Use Report, and participation on the Office of the City Administrator's Flood Task Force.
- 5. Racial Equity:** In FY22, OP will continue to work closely with the Mayor's Office of Racial Equity to embed racial equity throughout the agency's work. This work will include

continuing to implement the Comp Plan by applying racial equity lenses to neighborhood planning, zoning, and capital improvements planning.

OFFICE OF PLANNING – ORGANIZATION CHART



FTE Breakdown

- Local: 76.5
- Federal: 3.5
- Capital: 1.0 (via I-D)*
- SPR: --
- Other: --
- Total: 81

OFFICE OF PLANNING - SCHEDULE A (as of February 1, 2022)

| Name | Title | Vac Stat | Grade | Step | Salary | Fringe @21.7% | Department Name |
|-------------------------|-------------------------------------|----------|-------|------|-----------|---------------|-------------------------------|
| Khan,Sakina H | Deputy Director | F | 16 | 0 | \$152,227 | \$33,033 | Citywide Strategy & Analysis |
| Dennee,Timothy J. | Historic Preservation Spec. | F | 13 | 10 | \$126,508 | \$27,452 | Historic Preservation |
| Flores,Rogelio | Associate Director for Citywid | F | 15 | 0 | \$143,258 | \$31,087 | Citywide Planning |
| Waardenburg,Dennis S | Cartographer | F | 13 | 10 | \$126,508 | \$27,452 | Data Analysis & Visualization |
| Kirschenbaum,Jonathan W | Development Review Specialist | F | 13 | 4 | \$107,620 | \$23,354 | Development Review |
| Lambert,Rupert K | HP Inspector | F | 11 | 10 | \$88,787 | \$19,267 | Historic Preservation |
| Thomas,Karen M | Development Review Specialist | F | 14 | 9 | \$145,778 | \$31,634 | Development Review |
| Brown-roberts,Maxine H | Development Review Specialist | F | 14 | 9 | \$145,778 | \$31,634 | Development Review |
| Cozart,Anita M | Director | F | E4 | 0 | \$175,064 | \$37,989 | Office of the Director |
| Gyor,Stephen Michael | Lead Community Planner | F | 14 | 5 | \$130,906 | \$28,407 | Citywide Planning |
| Greene,Jonathan | Community Planner | F | 12 | 3 | \$90,501 | \$19,639 | Neighborhood Planning |
| Yarnall,Bruce A | Education Outreach Program Man | F | 13 | 7 | \$117,064 | \$25,403 | Historic Preservation |
| Cochran,Stephen L | Community Planner | F | 14 | 10 | \$149,496 | \$32,441 | Development Review |
| Maher,Timothy D | Community Planner | F | 13 | 5 | \$110,768 | \$24,037 | Urban Design |
| Lewis,Charles A | Historic Preservation Spec. | F | 14 | 9 | \$145,778 | \$31,634 | Historic Preservation |
| Bird,Melissa C | Associate Director | F | 15 | 0 | \$143,664 | \$31,175 | Neighborhood Planning |
| Williams,Kimberly P | Architectural Historian | F | 13 | 7 | \$117,064 | \$25,403 | Historic Preservation |
| Fothergill,Anne | Development Review Specialist | F | 14 | 6 | \$134,624 | \$29,213 | Development Review |
| Harris,Karen | Executive Assistant | F | 12 | 3 | \$90,501 | \$19,639 | Multiple |
| Poindexter,Rita J | Staff Assistant | F | 11 | 9 | \$86,574 | \$18,787 | Operations |
| Hand,Ryan | Community Planner | F | 14 | 5 | \$130,906 | \$28,407 | Citywide Planning |
| Wilson,Valecia | Community Planner | F | 13 | 3 | \$104,472 | \$22,670 | Neighborhood Planning |
| Calkins,Kristin S | Community Planner(Transportation) | F | 14 | 4 | \$127,188 | \$27,600 | Citywide Planning |
| Howerton,Leslye | Associate Director | F | 15 | 0 | \$141,780 | \$30,766 | Urban Design |
| Meyer,James B | Historic Preservatio Spec. | F | 12 | 7 | \$101,085 | \$21,935 | Historic Preservation |
| Steingasser,Jennifer L. | Deputy Director | F | 16 | 0 | \$166,373 | \$36,103 | Development Review & HP |
| Pate,John | Demographic Specialist | F | 13 | 6 | \$113,916 | \$24,720 | Data Analysis & Visualization |
| Lawson,Joel | Associate Director | F | 15 | 0 | \$142,024 | \$30,819 | Development Review |
| Maloney,David J | State Historic Preservation Officer | F | 15 | 0 | \$143,943 | \$31,236 | Historic Preservation |
| Crain,Deborah L | Community Planner | F | 14 | 9 | \$145,778 | \$31,634 | Neighborhood Planning |
| Gould,Rishawna | Visual Information Specialist | F | 13 | 6 | \$113,916 | \$24,720 | Data Analysis & Visualization |
| Limauro,Andrea | Community Planner | F | 13 | 8 | \$120,212 | \$26,086 | Neighborhood Planning |
| Mordfin,Stephen J | Development Review Specialist | F | 14 | 8 | \$142,060 | \$30,827 | Development Review |
| Phillips,Joy E | Associate Director | F | 15 | 0 | \$144,208 | \$31,293 | Data Analysis & Visualization |
| Anna,Alemayehu M | IT Specialist | F | 14 | 10 | \$149,496 | \$32,441 | Data Analysis & Visualization |
| Williams, Jessica | Community Planner | F | 12 | 1 | \$85,209 | \$18,490 | Neighborhood Planning |
| Chafetz,Sarah JB | Special Assistant | F | 13 | 3 | \$95,192 | \$20,657 | Office of the Director |
| Rodgers,Arthur H. | Community Planner | F | 14 | 8 | \$142,060 | \$30,827 | Citywide Planning |
| An,Le | Lead Comm. Planner (Placemaking) | F | 14 | 3 | \$123,470 | \$26,793 | Urban Design |
| Price,Imania G | Historic Preservation Specialist | F | 11 | 5 | \$77,722 | \$16,866 | Historic Preservation |
| Callcott,Stephen L | Senior Historic Preservation Spec. | F | 15 | 0 | \$127,476 | \$27,662 | Historic Preservation |
| Giefer,Edward T | Associate Director | F | 15 | 0 | \$145,851 | \$31,650 | Operations |
| Harp,Sandra F | Management Liaison Specialist | F | 14 | 7 | \$126,049 | \$27,353 | Office of the Director |
| Myers,Crystal | Development Review Specialist | F | 13 | 6 | \$113,916 | \$24,720 | Development Review |
| Ozberk,Erkin | Community Planner | F | 13 | 5 | \$110,768 | \$24,037 | Neighborhood Planning |
| Elliott,Kimberly | Historic Preservation Spec. | F | 13 | 8 | \$120,212 | \$26,086 | Historic Preservation |
| Vitale,Elisa | Development Review Specialist | F | 14 | 6 | \$134,624 | \$29,213 | Development Review |
| Barber,Jennifer | Executive Assistant | F | 13 | 5 | \$100,926 | \$21,901 | Office of the Director |
| Jesick,Matthew R | Development Review Specialist | F | 13 | 10 | \$126,508 | \$27,452 | Development Review |
| Elliott,Brandice N | Development Review Specialist | F | 14 | 6 | \$134,624 | \$29,213 | Development Review |
| Nadal,Moiria B | Historic Preservation Spec | F | 11 | 5 | \$77,722 | \$16,866 | Historic Preservation |
| Chandler,Jamie | Data Visualization Analyst | F | 14 | 5 | \$130,906 | \$28,407 | Data Analysis & Visualization |
| Azimeraw,Minwuyet M. | Demographic Specialist | F | 11 | 8 | \$84,361 | \$18,306 | Data Analysis & Visualization |
| Delaney,Joyetta | Executive Assistant | F | 12 | 3 | \$90,501 | \$19,639 | Development Review & HP |
| Troccoli,Ruth | Archeologist | F | 12 | 9 | \$106,377 | \$23,084 | Historic Preservation |
| Jones,Todd Joseph | Historic Preservation Spec | F | 12 | 2 | \$87,855 | \$19,065 | Historic Preservation |
| Stephens,Ashley | Staff Assistant | F | 11 | 5 | \$77,722 | \$16,866 | Neighborhood Planning |
| Balkus,Ona | Food Policy Director | F | 8 | 0 | \$124,229 | \$26,958 | Office of the Director |
| Jackson,Julianna | Staff Assistant | F | 11 | 5 | \$77,722 | \$16,866 | Historic Preservation |
| Lieb,David | Attorney Advisor | F | 15 | 7 | \$174,737 | \$37,918 | Office of the Director |
| Williams,Anthony E | HP Inspector | F | 11 | 5 | \$77,722 | \$16,866 | Historic Preservation |
| Sheriff,Tariq | Policy Analyst | F | 11 | 6 | \$79,935 | \$17,346 | Citywide Planning |
| Shaheen,Christopher M | Lead Comm. Planner (Public Space) | F | 14 | 6 | \$134,624 | \$29,213 | Urban Design |
| Alemayehu,Mekdelawit | Public Affairs Specialist | F | 13 | 7 | \$106,660 | \$23,145 | Office of the Director |
| Poole,Alisonya | Community Planner | F | 11 | 2 | \$71,083 | \$15,425 | Urban Design |
| Williams-cherry,Toni V | HP Compliance Officer | F | 13 | 8 | \$120,212 | \$26,086 | Historic Preservation |
| Funes,Jose Elias | Cartographer | F | 13 | 5 | \$110,768 | \$24,037 | Data Analysis & Visualization |
| Luthy,Edward W | Cartographer | F | 13 | 5 | \$110,768 | \$24,037 | Data Analysis & Visualization |
| ElGawish,Heba | Community Planner | F | 13 | 2 | \$101,324 | \$21,987 | Neighborhood Planning |
| Abou Samra,Rita | Community Planner | F | 12 | 1 | \$85,209 | \$18,490 | Urban Design |
| Oliver, Wilton | Community Planner | F | 12 | 3 | \$90,501 | \$19,639 | Citywide Planning |
| Ruffin, Shannon | HR Specilist | F | 12 | 3 | \$82,465 | \$17,895 | Operations |
| Guerra,Nelly V | Chief of Staff | F | 15 | 0 | \$149,000 | \$32,333 | Office of the Director |
| Brockett,Anne O | Historic Preservation Specialist | F | 13 | 7 | \$117,064 | \$25,403 | Historic Preservation |
| | Dep Dir, Long Range Planning | V | 16 | 0 | \$162,584 | \$35,281 | Community Planning & Design |
| | Community Planner | V | 14 | 1 | \$116,034 | \$25,179 | Neighborhood Planning |
| | Community Planner | V | 12 | 0 | \$85,209 | \$18,490 | Neighborhood Planning |
| | Community Planner | V | 12 | 0 | \$85,209 | \$18,490 | Citywide Planning |
| | Community Planner | V | 13 | 0 | \$98,176 | \$21,304 | Citywide Planning |
| | Attorney Advisor | V | 13 | 0 | \$104,766 | \$22,734 | Office of the Director |
| | Grants Management Specialist | V | 13 | 1 | \$94,858 | \$20,584 | Urban Design |

Attachment Q14



OFFICE OF PLANNING

FY 2020 - 2022 Budgets & Expenditures (through January 31, 2022)

| Comp Source Group | FY 2020 | | | | | FY 2021 | | | | | FY 2022 | | | | |
|---|-----------------|----------------|-----------------|--------------|---|-----------------|----------------|-----------------|--------------|---|-----------------|----------------|-----------------|---------------------------|---|
| | Original Budget | Revised Budget | Budget Variance | Expenditures | Comments | Original Budget | Revised Budget | Budget Variance | Expenditures | Comments | Original Budget | Revised Budget | Budget Variance | Year-to-Date Expenditures | Comments |
| LOCAL | | | | | | | | | | | | | | | |
| 0011 - REGULAR PAY - CONT FULL TIME | \$8,134,694 | \$8,177,901 | \$43,207 | \$8,107,537 | | \$8,141,206 | \$8,225,846 | \$84,640 | \$8,235,757 | Small amount of vacancy savings during year. | \$8,560,742 | \$8,560,742 | \$0 | \$2,694,840 | |
| 0012 - REGULAR PAY - OTHER | \$0 | \$0 | \$0 | \$0 | | \$0 | \$0 | \$0 | \$0 | | \$238,705 | \$238,705 | \$0 | \$12,907 | Term FTEs. |
| 0013 - ADDITIONAL GROSS PAY | \$0 | \$14,868 | \$14,868 | \$14,080 | Final leave payouts for OP employees who left agency. | \$0 | \$33,373 | \$33,373 | \$33,373 | Final leave payouts for OP employees who left agency. | \$0 | \$0 | \$0 | \$44,175 | Final leave payouts for OP employees who left agency. |
| 0014 - FRINGE BENEFITS - CURR PERSONNEL | \$1,764,361 | \$1,764,361 | \$0 | \$1,746,894 | | \$1,757,496 | \$1,795,285 | \$37,789 | \$1,735,307 | | \$1,907,016 | \$1,907,016 | \$0 | \$537,097 | |
| 0015 - OVERTIME PAY | \$20,000 | \$43,000 | \$23,000 | \$24,699 | OP increased budget for OT after a very busy Q1. Did not spend all funds due to fewer after-hours and weekend meetings during pandemic. | \$10,000 | \$20,000 | \$10,000 | \$8,355 | | \$0 | \$0 | \$0 | \$783 | OT funds zeroed out in FY 2022 budget. Will reprogram funds here to cover OT for FY 22. |
| | \$9,919,055 | \$10,000,130 | \$81,075 | \$9,893,210 | PS underspending due to starting the year with one vacancy (filled mid-year) and ending the year with one position that became vacant in | \$9,908,702 | \$10,074,504 | \$165,802 | \$10,012,792 | Revised PS budget includes +\$190,802 at year-end to support FY 21 COLA back pay | \$10,706,463 | \$10,706,463 | \$0 | \$3,289,802 | |
| PERSONNEL SERVICES Total | | | | | | | | | | | | | | | |
| 0020 - SUPPLIES AND MATERIALS | \$37,500 | \$21,096 | (\$16,404) | \$17,556 | Reduced budget as part of mid-year pandemic cuts. Did not spend all funds due to fewer purchases during pandemic due to telework posture. | \$31,850 | \$31,850 | \$0 | \$29,271 | | \$31,850 | \$31,850 | \$0 | \$0 | |
| 0031 - TELEPHONE, TELEGRAPH, TELEGRAM | \$0 | \$2,000 | \$2,000 | \$1,059 | | \$0 | \$1,600 | \$1,600 | \$895 | | \$0 | \$0 | \$0 | \$0 | |
| 0040 - OTHER SERVICES AND CHARGES | \$136,339 | \$122,339 | (\$14,000) | \$87,233 | Reduced budget as part of mid-year pandemic cuts. Did not spend all funds due to pandemic. | \$71,424 | \$69,824 | (\$1,600) | \$66,952 | Covers office ops: travel, telecom, fleet, PCard, office machine/printer maint., parking for fleet, training/ conference fees, express deliveries, membership dues, minor print jobs/business cards, meeting space rental, media subscriptions, interpretations/translati ons, imprest fund, etc. | \$72,508 | \$72,508 | \$0 | \$13,972 | Covers office ops: travel, telecom, fleet, PCard, office machine/printer maint., parking for fleet, training/ conference fees, express deliveries, membership dues, minor print jobs/business cards, meeting space rental, media subscriptions, interpretations/translati ons, imprest fund, etc. |
| 0041 - CONTRACTUAL SERVICES - OTHER | \$3,287,215 | \$2,777,206 | (\$510,009) | \$2,646,941 | Orig. budget includes \$2.5M to support Census 2020. Reduced budget includes midyear pandemic cut, \$100K sent to MOCA for Census, and other reductions. Did not spend all funds due to pandemic. | \$1,000,000 | \$945,000 | (\$55,000) | \$873,002 | Unspent includes large procurement for laptops that was cancelled when not received by 9/30/21. | | \$3,042,823 | #VALUE! | \$0 | Contracts in various stages of procurement. |
| 0050 - SUBSIDIES AND TRANSFERS | \$250,000 | \$414,419 | \$164,419 | \$170,630 | Revised budget includes unspent carryover for the Historic homeowner grant program. Did not spend all funds due to pandemic. | \$250,000 | \$250,000 | \$0 | \$157,231 | Did not spend all Historic homeowner grant funds due to pandemic. | \$3,057,570 | \$3,394,128 | \$336,558 | \$19,166 | Includes Historic homeowner grant + Streets for People Grant. |
| 0070 - EQUIPMENT & EQUIPMENT RENTAL | \$53,500 | \$17,800 | (\$35,700) | \$17,799 | Reduced budget as part of mid-year pandemic cuts. | \$52,900 | \$52,900 | \$0 | \$51,994 | | \$52,900 | \$52,900 | \$0 | \$0 | IT hardware and software. |
| NON-PERSONNEL SERVICES Total | \$3,764,554 | \$3,354,860 | (\$409,694) | \$2,941,218 | | \$1,406,174 | \$1,351,174 | (\$55,000) | \$1,179,345 | | \$3,214,828 | \$6,594,209 | #VALUE! | \$33,138 | |



| Comp Source Group | FY 2020 | | | | Comments | FY 2021 | | | | Comments | FY 2022 | | | Year-to-Date Expenditures | Comments |
|---|------------------|------------------|------------------|------------------|---|------------------|------------------|-------------------|------------------|--|------------------|------------------|------------------|---------------------------|--|
| | Original Budget | Revised Budget | Budget Variance | Expenditures | | Original Budget | Revised Budget | Budget Variance | Expenditures | | Original Budget | Revised Budget | Budget Variance | | |
| LOCAL Fund Total | \$13,683,609 | \$13,354,990 | (\$328,619) | \$12,834,428 | | \$11,314,876 | \$11,425,678 | \$110,802 | \$11,192,137 | | \$13,921,291 | \$17,300,672 | #VALUE! | \$3,322,940 | |
| FEDERAL GRANTS | | | | | | | | | | | | | | | |
| 0011 - REGULAR PAY - CONT FULL TIME | \$390,277 | \$401,974 | \$11,697 | \$394,712 | HP grant from National Park Service, supports 3.5 OP FTE. | \$394,614 | \$377,531 | (\$17,083) | \$377,496 | HP grant from National Park Service, supports 3.5 OP FTE. Budget reduced to level of expenditures for carryover to FY 2022. | \$400,874 | \$410,874 | \$10,000 | \$132,583 | HP grant from National Park Service, supports 3.5 OP FTE. |
| 0014 - FRINGE BENEFITS - CURR | \$84,690 | \$85,864 | \$1,174 | \$93,465 | | \$85,631 | \$76,962 | (\$8,669) | \$76,962 | | \$87,391 | \$89,891 | \$2,500 | \$26,126 | |
| PERSONNEL SERVICES Total | \$474,967 | \$487,838 | \$12,871 | \$488,177 | | \$480,245 | \$454,493 | (\$25,752) | \$454,458 | | \$488,265 | \$500,765 | \$12,500 | \$158,709 | |
| 0020 - SUPPLIES AND MATERIALS | \$0 | \$0 | \$0 | \$0 | | \$0 | \$0 | \$0 | \$0 | | \$0 | \$0 | \$0 | \$0 | |
| 0041 - CONTRACTUAL SERVICES - OTHER | \$50,033 | \$80,827 | \$30,794 | \$80,524 | | \$61,792 | \$75,338 | \$13,546 | \$75,338 | Contracts and grants to support HP activities. | \$57,735 | \$150,291 | \$92,556 | \$22,927 | Contracts and grants to support HP activities. |
| | \$50,033 | \$80,827 | \$30,794 | \$80,524 | Revised budget: Increase from Historic Preservation Fund federal grant - unspent FY 2019 carryover. | \$61,792 | \$75,338 | \$13,546 | \$75,338 | | \$57,735 | \$150,291 | \$117,556 | \$22,927 | |
| NON-PERSONNEL SERVICES Total | | | | | | | | | | | | | | | |
| Federal Grant Funds Total | \$525,000 | \$568,665 | \$43,665 | \$568,701 | | \$542,037 | \$529,831 | (\$12,206) | \$529,796 | | \$546,000 | \$651,056 | \$130,056 | \$181,636 | |
| PRIVATE GRANTS | | | | | | | | | | | | | | | |
| 0011 - REGULAR PAY - CONT FULL TIME | \$0 | \$0 | \$0 | \$0 | | \$0 | \$20,717 | \$20,717 | \$20,717 | | \$0 | \$24,242 | \$24,242 | \$0 | |
| 0014 - FRINGE BENEFITS - CURR PERSONNEL | \$0 | \$0 | \$0 | \$0 | | \$0 | \$4,499 | \$4,499 | \$4,499 | | \$0 | \$5,257 | \$5,257 | \$0 | |
| | \$0 | \$0 | \$0 | \$0 | | \$0 | \$25,216 | \$25,216 | \$25,216 | Time and effort paid for by the Urban Institute grant for "Upward Mobility" project. Remaining balance carried forward to FY 2022. | \$0 | \$29,499 | \$29,499 | \$0 | Urban Institute private grant for "Upward Mobility" project. Carried forward from FY 2021. |
| PERSONNEL SERVICES Total | | | | | | | | | | | | | | | |
| 0041 - CONTRACTUAL SERVICES - OTHER | \$10,001 | \$320,000 | \$309,999 | \$320,000 | Revised budget includes private grants from ArtPlace (\$240K; playable art) and Kresge Foundation (\$80K; placemaking). | \$10,000 | \$22,060 | \$12,060 | \$22,060 | Includes Marshall Heights Comm. Development Org. grant project to support Penn. Ave. SE (activation), spending National Trust grant to support HistoryQuest, and spending Urban Institute grant to create "Upward Mobility" website. | \$10,000 | \$20,940 | \$10,940 | \$10,000 | Marshall Heights Comm. Development Org. grant project to support Penn. Ave. SE. |
| 0050 - SUBSIDIES AND TRANSFERS | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$60,000 | \$60,000 | \$60,000 | Subgrants to community orgs paid for by the Urban Institute grant for "Upward Mobility" project. Remaining balance carried forward to FY 2022. | \$0 | \$2,250 | \$2,250 | \$0 | Carryover funding from the Urban Institute grant for the "Upward Mobility" project. |
| NON-PERSONNEL SERVICES Total | \$10,001 | \$320,000 | \$309,999 | \$320,000 | | \$10,000 | \$82,060 | \$72,060 | \$82,060 | | \$10,000 | \$23,190 | \$13,190 | \$10,000 | |
| Private Grant Funds Total | \$10,001 | \$320,000 | \$309,999 | \$320,000 | | \$10,000 | \$107,276 | \$97,276 | \$107,276 | | \$10,000 | \$52,689 | \$42,689 | \$10,000 | |
| SPECIAL PURPOSE REVENUE | | | | | | | | | | | | | | | |
| 0040 - OTHER SERVICES AND CHARGES | \$200,000 | \$18,071 | (\$181,929) | \$18,071 | Budget split into 0040 (to pay stipends for HPRB members) and 0041 (to pay for projects and grants to support historic preservation in the District). | \$15,000 | \$9,956 | (\$5,044) | \$9,956 | Stipends for HPRB members. | \$15,000 | \$15,000 | \$0 | \$1,981 | Stipends for HPRB members. |

Attachment Q14



OFFICE OF PLANNING

FY 2020 - 2022 Budgets & Expenditures (through January 31, 2022)

| Comp Source Group | FY 2020 | | | | Comments | FY 2021 | | | | Comments | FY 2022 | | | Year-to-Date Expenditures | Comments |
|-------------------------------------|---------------------|---------------------|-------------------|---------------------|---|---------------------|---------------------|--------------------|---------------------|---|---------------------|---------------------|--------------------|---------------------------|----------|
| | Original Budget | Revised Budget | Budget Variance | Expenditures | | Original Budget | Revised Budget | Budget Variance | Expenditures | | Original Budget | Revised Budget | Budget Variance | | |
| 0041 - CONTRACTUAL SERVICES - OTHER | \$0 | \$119,015 | \$119,015 | \$119,015 | Non-lapsing fund. Note that the OCFO reduces the Budget to the Expenditures amount at year-end. | \$135,000 | \$32,964 | (\$102,036) | \$31,964 | Purchases to support HP with these o-type funds. | \$85,000 | \$85,000 | \$0 | \$4,553 | |
| NON-PERSONNEL SERVICES Total | \$200,000 | \$137,086 | (\$62,914) | \$137,086 | | \$150,000 | \$42,920 | (\$107,080) | \$41,920 | | \$100,000 | \$100,000 | \$0 | \$6,534 | |
| Special Purpose Revenue Total | \$200,000 | \$137,086 | (\$62,914) | \$137,086 | | \$150,000 | \$42,920 | (\$107,080) | \$41,920 | Budget authority reduced in FY 2021 as funds were swept as part of COVID cuts. | \$100,000 | \$100,000 | \$0 | \$6,534 | |
| INTRA-DISTRICT TRANSFERS | | | | | | | | | | | | | | | |
| 0015 - OVERTIME PAY | \$0 | \$8,555 | \$8,555 | \$8,555 | Federal FEMA reimbursement (via HSEMA) for pandemic-related overtime | \$0 | \$0 | \$0 | \$0 | | \$0 | \$0 | \$0 | \$0 | |
| 0041 - CONTRACTUAL SERVICES - OTHER | \$0 | \$25,000 | \$25,000 | \$24,550 | Agreement w/DHCD for a Far SE/SW Housing Cost Study. | \$0 | \$69,800 | \$69,800 | \$69,800 | Agreement with DMPED to fund the purchase of redistricting software to aid District Census efforts. | \$0 | \$0 | \$0 | \$0 | |
| NON-PERSONNEL SERVICES Total | \$0 | \$25,000 | \$25,000 | \$24,550 | | \$0 | \$69,800 | \$69,800 | \$69,800 | | \$0 | \$0 | \$0 | \$0 | |
| Intra-District Transfer Total | \$0 | \$25,000 | \$25,000 | \$24,550 | | \$0 | \$69,800 | \$69,800 | \$69,800 | | \$0 | \$0 | \$0 | \$0 | |
| TOTAL OFFICE OF PLANNING | \$14,418,610 | \$14,405,741 | (\$12,869) | \$13,884,765 | | \$12,016,913 | \$12,175,505 | \$158,592 | \$11,940,929 | | \$14,577,291 | \$18,104,417 | \$3,527,126 | \$3,521,110 | |

Office of Planning

Annual Freedom of Information Act Report for Fiscal Year 2021
October 1, 2020 through September 30, 2021

FOIA Officer Reporting Edward Giefer

PROCESSING OF FOIA REQUESTS

- 1. Number of FOIA requests received during reporting period...51
2. Number of FOIA requests pending on October 1, 2020...8
3. Number of FOIA requests pending on September 30, 2021...1
4. The average number of days unfilled requests have been pending before each public body as of September 30, 2021...2

DISPOSITION OF FOIA REQUESTS

- 5. Number of requests granted, in whole...8
6. Number of requests granted, in part, denied, in part...2
7. Number of requests denied, in whole...0
8. Number of requests withdrawn...0
9. Number of requests referred or forwarded to other public bodies...48
10. Other disposition

NUMBER OF REQUESTS THAT RELIED UPON EACH FOIA EXEMPTION

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

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

TIME-FRAMES FOR PROCESSING FOIA REQUESTS

- 23. Number of FOIA requests processed within 15 days.....55
- 24. Number of FOIA requests processed between 16 and 25 days.....2
- 25. Number of FOIA requests processed in 26 days or more.....1
- 26. Median number of days to process FOIA Requests.....1

RESOURCES ALLOCATED TO PROCESSING FOIA REQUESTS

- 27. Number of staff hours devoted to processing FOIA requests.....70
- 28. Total dollar amount expended by public body for processing FOIA requests.....\$5,250

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 Act0

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].

Please note that most of the requests submitted to the Office of Planning in FY 2021 were best answered by other agencies because OP had no responsive information.

Mission The mission of the Office of Planning (OP) is to guide development of the District of Columbia, including the preservation and revitalization of our distinctive neighborhoods, while engaging all communities.

Strategic Objectives

| Objective Number | Strategic Objective |
|------------------|--|
| 1 | Provide data and analysis to support sound and integrated policy decisions that strengthen the District’s fiscal stability, sustainability, and quality of life. |
| 2 | Catalyze improvements in the urban design, economic vitality, and livability of District neighborhoods by creating excellent, context-sensitive plans. |
| 3 | Increase the transparency and predictability of the planning process to better engage stakeholders and to enrich the dialogue around key planning tools and topics. |
| 4 | Enhance the District’s built environment by promoting high quality development through clarified regulations, mandatory and discretionary zoning reviews, historic preservation review processes, and technical assistance in planning and design. |
| 5 | Create and maintain a highly efficient, transparent, and responsive District government. |

Key Performance Indicators (KPIs)

| Measure | Directionality | FY 2019 Actual | FY 2020 Actual | FY 2021 Actual | FY 2022 Target |
|--|----------------|-------------------------|-------------------------|-------------------------|----------------|
| 1 - Provide data and analysis to support sound and integrated policy decisions that strengthen the District’s fiscal stability, sustainability, and quality of life. (2 Measures) | | | | | |
| Satisfaction rating given by the Director of the Capital Improvements Program re: the consistency and quality of OP’s contribution | Up is Better | 100% | 100% | 100% | 90% |
| Percent of Geographic Information Systems (GIS) and State Data customers (internal and external) who are satisfied with the maps and demographic data they received from OP staff, and that it will enable them to fulfill their role in planning the city and influencing quality neighborhood outcomes | Up is Better | 97.8% | 98.1% | 98.2% | 92% |
| 2 - Catalyze improvements in the urban design, economic vitality, and livability of District neighborhoods by creating excellent, context-sensitive plans. (5 Measures) | | | | | |
| Satisfaction rating given by head of Public Space Commission re: the consistency and quality of OP’s contribution | Up is Better | 100% | 100% | 100% | 90% |
| Percent of stakeholder requests for planning assistance fulfilled | Up is Better | 100% | 100% | 98.6% | 80% |
| Percent of OP small area plans approved by the Council or other neighborhood plans supported by the relevant Advisory Neighborhood Commissions (ANCs) | Up is Better | No Applicable Incidents | No Applicable Incidents | No Applicable Incidents | 92% |
| Percent of OP’s neighborhood plans that receive recognition from professional associations (American Planning Association (APA), Urban Land Institute (ULI), etc.) | Up is Better | No Applicable Incidents | No Applicable Incidents | No Applicable Incidents | 50% |
| Percent of discretionary developments/projects initiated within neighborhood plan boundaries that are guided by OP’s small area or neighborhood plans | Up is Better | 100% | 100% | 100% | 95% |
| 3 - Increase the transparency and predictability of the planning process to better engage stakeholders and to enrich the dialogue around key planning tools and topics. (2 Measures) | | | | | |
| Percent of customers OP engages who rate their interaction with OP as satisfactory or higher | Up is Better | 98.1% | 96.6% | 96.4% | 75% |
| Percent of relevant ANCs that OP engages in small area or neighborhood planning activities | Up is Better | 100% | No Applicable Incidents | 100% | 90% |
| 4 - Enhance the District’s built environment by promoting high quality development through clarified regulations, mandatory and discretionary zoning reviews, historic preservation review processes, and technical assistance in planning and design. (9 Measures) | | | | | |
| Percent of historic property permit applications reviewed over the counter | Up is Better | 97.5% | 98.1% | 97.6% | 90% |
| Percent of historic landmark designations without owner objection | Up is Better | 77.8% | 100% | 100% | 85% |
| Percent of Development Revenue reports that meet the expectations of boards/commissions | Up is Better | 92.8% | 94.2% | 92.4% | 92% |
| Percent of Planning Unit Developments (PUDs) that exceed minimum requirements to further the Sustainable DC plan including the provision of green roofs or other features to help reduce storm water runoff, electric car charging stations or bike share facilities | Up is Better | 66.7% | 100% | 100% | 65% |
| Average number of cases reviewed per zoning review staff | Up is Better | 457 | 566 | 30 | 35 |
| Percent of Historic Preservation staff reports that meet the expectations of the Historic Preservation Review Board Chair and the Mayor’s Agent | Up is Better | 100% | 93.6% | 93.1% | 92% |
| Percent of historic preservation projects properly noticed after implementation of new regulations | Up is Better | 92.1% | 92% | 86.4% | 90% |
| Percent of DC government project reviews concluded with adverse effects resolved by consensus | Up is Better | 99.3% | 99.8% | 99.8% | 90% |
| Average number of cases reviewed per historic preservation staff | Up is Better | 708.6 | 878.1 | 834.7 | 600 |

Operations

| Operations Title | Operations Description | Type of Operations |
|--|--|--------------------|
| 1 - Provide data and analysis to support sound and integrated policy decisions that strengthen the District’s fiscal stability, sustainability, and quality of life. (8 Activities) | | |
| Planning Pilots | Pilot planning tools to demonstrate the feasibility of new ideas or strategies in OP reports. | Daily Service |
| Policy and Regulation Support | Provide policy assistance and regulation support to the Mayor’s Office and partner agencies in key sectors such as housing, transportation, economic development, and public space. | Daily Service |
| Citywide Planning | Create studies and provide programmatic support to District agencies for citywide issues such as affordable housing, arts and culture, urbanism, industrial lands, sustainability, health, and the creative economy. | Key Project |
| Mapping Services | Provide mapping services to District agencies and the public. | Daily Service |

| Operations Title | Operations Description | Type of Operations |
|--|--|--------------------|
| Demographic Services | Provide U.S. Census population and demographic data to District agencies and the public. | Daily Service |
| Growth Forecasts | Provide District of Columbia Growth Forecasts on population, households, and employment. | Key Project |
| INDICES | Produce INDICES, a 300-page snapshot of District government operations, every other year. | Key Project |
| Capital Planning | Provide long-range capital planning services for schools, parks, and other public facilities. | Key Project |
| 2 - Catalyze improvements in the urban design, economic vitality, and livability of District neighborhoods by creating excellent, context-sensitive plans. (7 Activities) | | |
| Placemaking | Undertake placemaking projects to enliven and enrich properties, streets, neighborhoods, waterfronts, and the District. | Key Project |
| Revitalization And Design | Partner on planning and implementation efforts for Center City, coordinating with District and Federal Partners, businesses, and resident groups. | Key Project |
| Comprehensive Plan | Monitor and update the city's Comprehensive Plan to establish land uses and other overarching policies that guide growth and development. | Daily Service |
| Comp Plan Updates and Amendments | Produce a full update to the Comp Plan every 12 years and an amendment every four years. | Key Project |
| Poplar Point Redevelopment | Produce a Small Area Plan and work with the National Park Service to facilitate the transfer and improvement of Poplar Point. | Key Project |
| Neighborhood Plans | Develop small area plans or other customized planning tools to address challenges and manage change at the neighborhood scale. | Daily Service |
| Design Support | Provide design services to OP divisions and District agencies and undertake analysis to provide design decision-making frameworks. | Daily Service |
| 3 - Increase the transparency and predictability of the planning process to better engage stakeholders and to enrich the dialogue around key planning tools and topics. (3 Activities) | | |
| Education | Educate residents and other stakeholders regarding current planning policies and zoning regulations. | Daily Service |
| Best Practices | Develop and adopt new and effective methods to improve the quality of public participation and input. | Daily Service |
| Engagement | Conduct meaningful public engagement through active projects and ongoing community conversations in all eight wards. | Daily Service |
| 4 - Enhance the District's built environment by promoting high quality development through clarified regulations, mandatory and discretionary zoning reviews, historic preservation review processes, and technical assistance in planning and design. (9 Activities) | | |
| Planned Unit Developments (PUDs) | Emphasize the provision of housing affordability, environmental sustainability, and design excellence for projects requesting additional density or development flexibility through the PUD process, while reviewing all proposed PUDs against the Comprehensive Plan, small area plans, and major policy initiatives. | Daily Service |
| HPRB Staff Reports | Produce a staff report on each case before the Historic Preservation Review Board. | Daily Service |
| Homeowner Grants | Award targeted grants to help low and moderate-income homeowners with the cost of preserving their historic homes. | Daily Service |
| Historic Landmark Designations | Evaluate and recognize significant properties eligible for historic landmark designation. | Daily Service |
| Zoning Staff Reports | Produce a staff reports on each case before the Zoning Commission and Board of Zoning Adjustment. | Daily Service |
| Historic Preservation Reviews | Review conceptual design and permit applications for work on historically designated properties, or properties in historic districts, as an over-the-counter service. | Daily Service |
| Government Project Reviews | Review conceptual design and permit applications for District and federal government undertakings for compatibility with historic work on historically designated or eligible properties, or properties in historic districts. | Daily Service |
| Zoning Regulations Update | Work with the Office of Zoning, Office of the Attorney General, and the Department of Consumer and Regulatory Affairs (DCRA) to implement the new zoning regulations, and provide clarification through technical corrections and text amendments as necessary. | Key Project |
| Historic Preservation Planning | Produce and update short- and long-term, comprehensive historic preservation plans and studies, including the DC Historic Preservation Plan and Historic Preservation Element of the DC Comprehensive Plan, to guide efforts, preserve history and heritage, and establish goals. | Key Project |

Workload Measures (WMs)

| Measure | FY 2019 Actual | FY 2020 Actual | FY 2021 Actual |
|---|----------------|----------------|----------------|
| 1 - Citywide Planning (2 Measures) | | | |
| Number of analyses conducted and studies produced | 115 | 161 | 93 |
| Number of District agencies that have used OP research and analysis products to effectively support their work | 116 | 91 | 141 |
| 1 - Demographic Services (1 Measure) | | | |
| Number of requests for Census or other demographics information | 168 | 286 | 274 |
| 1 - Mapping Services (1 Measure) | | | |
| Number of requests for mapping or geospatial services | 108 | 235 | 292 |
| 1 - Policy and Regulation Support (1 Measure) | | | |
| Number of public space applications submitted to OP for review | 1515 | 1945 | 2279 |
| 2 - Neighborhood Plans (2 Measures) | | | |
| Number of requests for planning assistance or information received from civic organizations or other stakeholders | 591 | 1203 | 826 |
| Number of neighborhood plans or major projects delivered | 17 | 17 | 16 |
| 3 - Education (2 Measures) | | | |
| Number of persons attending/participating in stakeholder engagement activities conducted by OP | 5787 | 7575 | 4287 |

| Measure | FY 2019 Actual | FY 2020 Actual | FY 2021 Actual |
|--|----------------|----------------|----------------|
| Number of stakeholder engagement activities conducted by OP for purposes of education, dialogue, and/or feedback | 85 | 195 | 124 |
| 4 - Government Project Reviews (2 Measures) | | | |
| Number of historic preservation cases regarding District and federal government undertakings filed for State Historic Preservation Office review | 879 | 746 | 950 |
| Number of archaeology cases regarding District and federal government undertakings filed for State Historic Preservation Office review | 229 | 391 | 422 |
| 4 - Historic Landmark Designations (1 Measure) | | | |
| Number of cases filed for historic landmark designation | 8 | 5 | 20 |
| 4 - Historic Preservation Reviews (1 Measure) | | | |
| Number of permit applications submitted to Historic Preservation Office staff | 6669 | 6147 | 5908 |
| 4 - Homeowner Grants (1 Measure) | | | |
| Dollar amount of historic homeowner grants issued | \$139,730 | \$170,629 | \$157,231 |
| 4 - HPRB Staff Reports (1 Measure) | | | |
| Number of historic preservation cases submitted for Historic Preservation Review Board or U.S. Commission of Fine Arts review | 721 | 613 | 657 |
| 4 - Planned Unit Developments (PUDs) (1 Measure) | | | |
| Number of affordable housing units approved by the Zoning Commission through Planned Unit Developments | 391 | 203 | 131 |
| 4 - Zoning Staff Reports (2 Measures) | | | |
| Number of cases filed for Zoning Commission review | 77 | 55 | 54 |
| Number of cases filed for Board of Zoning Adjustment review | 301 | 151 | 257 |

Strategic Initiatives

| Strategic Initiative Title | Strategic Initiative Description | Proposed Completion Date |
|--|---|--------------------------|
| Capital Planning (1 Strategic Initiative) | | |
| Launch a New York Avenue Vision Framework. | OP will initiate development of a Vision Framework for the New York Avenue NE Corridor between Florida Avenue NE and South Dakota Avenue NE, and complete key components of the Framework by September 30, 2022. Key components include an existing conditions analysis, a community engagement strategy, and a development scenario analysis that prioritizes equity and housing production in alignment with the Comprehensive Plan and District needs, priorities, and goals. | 09-30-2022 |
| Citywide Planning (1 Strategic Initiative) | | |
| Initiate a study of Production, Distribution, and Repair land uses. | OP will initiate a study to inform the District's needs for Production, Distribution, and Repair (PDR) land uses, completing key components of the study by September 30, 2022. This effort will include identification of current PDR uses; an estimate of space currently required by those uses; and an assessment of how those space requirements may evolve over the next ten years. OP will also begin an evaluation of future demand for these uses and related space requirements based on industry trends and other factors. | 09-30-2022 |
| Historic Preservation Planning (1 Strategic Initiative) | | |
| Execute a grant with the DC History Center. | By January 2022, OP will execute a grant with the DC History Center, and collaborate with them and community-based advisory groups during the year to implement a program of history-related activities to preserve and elevate stories of Washington's diverse people, neighborhoods, and institutions. | 01-31-2022 |
| Neighborhood Plans (5 Strategic initiatives) | | |
| Initiate planning efforts in the Friendship Heights and Tenleytown neighborhoods | In FY 2022, OP will initiate planning efforts along the Wisconsin Avenue corridor with a focus on incentivizing additional residential density and affordable housing to meet citywide housing goals. OP will complete a substantial amount of this work by September 30, 2022. | 09-30-2022 |
| Conduct planning analyses in the Cleveland Park and Woodley Park neighborhoods. | By September 30, 2022, OP will substantially complete a planning effort along the Connecticut Avenue corridor with a focus on creating design guidelines to facilitate additional residential density and affordable housing to meet citywide housing goals, and consideration for adoption by the Historic Preservation Review Board. | 09-30-2022 |
| Complete Small Area Plans in Congress Heights and Pennsylvania Avenue SE. | For planning initiated in FY 2021, OP will complete Small Area Plans for Congress Heights and for Pennsylvania Avenue SE, including public review of draft plans and hosting Mayoral Hearings. OP will send both plans to the Council by March 31, 2022. | 03-31-2022 |
| Complete Small Area Plan in Chevy Chase. | For planning initiated in FY 2021, OP will complete a Small Area Plan for Chevy Chase, including public review of draft plans and hosting Mayoral Hearings. OP will send the plan to the Council by March 31, 2022. | 03-31-2022 |
| Initiate a planning study for the Ivy City neighborhood. | In FY 2022 OP will launch a Small Area Plan for the Ivy City neighborhood by conducting a public life study, and initiating community engagement, a quality of life assessment, analysis of industrial land, and development of public realm design guidelines. | 09-30-2022 |
| Revitalization And Design (1 Strategic Initiative) | | |
| Launch a Streets for People initiative. | In FY 2022 OP will launch a multi-year Streets for People initiative, a series of investments in Central Washington's public spaces for economic recovery. When concluded, this effort will yield an urban design framework for public space and demonstrate how temporary conversion of streets and sidewalks into vibrant public spaces can support local business development and attract workers, residents, and visitors to Central Washington. | 09-30-2022 |

Attachment Q14



OFFICE OF PLANNING

FY 2020 - 2022 Budgets & Expenditures (through January 31, 2022)

| Comp Source Group | FY 2020 | | | | | FY 2021 | | | | | FY 2022 | | | | |
|---|-----------------|----------------|-----------------|--------------|---|-----------------|----------------|-----------------|--------------|---|-----------------|----------------|-----------------|---------------------------|---|
| | Original Budget | Revised Budget | Budget Variance | Expenditures | Comments | Original Budget | Revised Budget | Budget Variance | Expenditures | Comments | Original Budget | Revised Budget | Budget Variance | Year-to-Date Expenditures | Comments |
| LOCAL | | | | | | | | | | | | | | | |
| 0011 - REGULAR PAY - CONT FULL TIME | \$8,134,694 | \$8,177,901 | \$43,207 | \$8,107,537 | | \$8,141,206 | \$8,225,846 | \$84,640 | \$8,235,757 | Small amount of vacancy savings during year. | \$8,560,742 | \$8,560,742 | \$0 | \$2,694,840 | |
| 0012 - REGULAR PAY - OTHER | \$0 | \$0 | \$0 | \$0 | | \$0 | \$0 | \$0 | \$0 | | \$238,705 | \$238,705 | \$0 | \$12,907 | Term FTEs. |
| 0013 - ADDITIONAL GROSS PAY | \$0 | \$14,868 | \$14,868 | \$14,080 | Final leave payouts for OP employees who left agency. | \$0 | \$33,373 | \$33,373 | \$33,373 | Final leave payouts for OP employees who left agency. | \$0 | \$0 | \$0 | \$44,175 | Final leave payouts for OP employees who left agency. |
| 0014 - FRINGE BENEFITS - CURR PERSONNEL | \$1,764,361 | \$1,764,361 | \$0 | \$1,746,894 | | \$1,757,496 | \$1,795,285 | \$37,789 | \$1,735,307 | | \$1,907,016 | \$1,907,016 | \$0 | \$537,097 | |
| 0015 - OVERTIME PAY | \$20,000 | \$43,000 | \$23,000 | \$24,699 | OP increased budget for OT after a very busy Q1. Did not spend all funds due to fewer after-hours and weekend meetings during pandemic. | \$10,000 | \$20,000 | \$10,000 | \$8,355 | | \$0 | \$0 | \$0 | \$783 | OT funds zeroed out in FY 2022 budget. Will reprogram funds here to cover OT for FY 22. |
| | \$9,919,055 | \$10,000,130 | \$81,075 | \$9,893,210 | PS underspending due to starting the year with one vacancy (filled mid-year) and ending the year with one position that became vacant in | \$9,908,702 | \$10,074,504 | \$165,802 | \$10,012,792 | Revised PS budget includes +\$190,802 at year-end to support FY 21 COLA back pay | \$10,706,463 | \$10,706,463 | \$0 | \$3,289,802 | |
| PERSONNEL SERVICES Total | | | | | | | | | | | | | | | |
| 0020 - SUPPLIES AND MATERIALS | \$37,500 | \$21,096 | (\$16,404) | \$17,556 | Reduced budget as part of mid-year pandemic cuts. Did not spend all funds due to fewer purchases during pandemic due to telework posture. | \$31,850 | \$31,850 | \$0 | \$29,271 | | \$31,850 | \$31,850 | \$0 | \$0 | |
| 0031 - TELEPHONE, TELEGRAPH, TELEGRAM | \$0 | \$2,000 | \$2,000 | \$1,059 | | \$0 | \$1,600 | \$1,600 | \$895 | | \$0 | \$0 | \$0 | \$0 | |
| 0040 - OTHER SERVICES AND CHARGES | \$136,339 | \$122,339 | (\$14,000) | \$87,233 | Reduced budget as part of mid-year pandemic cuts. Did not spend all funds due to pandemic. | \$71,424 | \$69,824 | (\$1,600) | \$66,952 | Covers office ops: travel, telecom, fleet, PCard, office machine/printer maint., parking for fleet, training/ conference fees, express deliveries, membership dues, minor print jobs/business cards, meeting space rental, media subscriptions, interpretations/translati ons, imprest fund, etc. | \$72,508 | \$72,508 | \$0 | \$13,972 | Covers office ops: travel, telecom, fleet, PCard, office machine/printer maint., parking for fleet, training/ conference fees, express deliveries, membership dues, minor print jobs/business cards, meeting space rental, media subscriptions, interpretations/translati ons, imprest fund, etc. |
| 0041 - CONTRACTUAL SERVICES - OTHER | \$3,287,215 | \$2,777,206 | (\$510,009) | \$2,646,941 | Orig. budget includes \$2.5M to support Census 2020. Reduced budget includes midyear pandemic cut, \$100K sent to MOCA for Census, and other reductions. Did not spend all funds due to pandemic. | \$1,000,000 | \$945,000 | (\$55,000) | \$873,002 | Unspent includes large procurement for laptops that was cancelled when not received by 9/30/21. | \$3,042,823 | \$3,042,823 | \$0 | \$0 | Contracts in various stages of procurement. |
| 0050 - SUBSIDIES AND TRANSFERS | \$250,000 | \$414,419 | \$164,419 | \$170,630 | Revised budget includes unspent carryover for the Historic homeowner grant program. Did not spend all funds due to pandemic. | \$250,000 | \$250,000 | \$0 | \$157,231 | Did not spend all Historic homeowner grant funds due to pandemic. | \$3,057,570 | \$3,394,128 | \$336,558 | \$19,166 | Includes Historic homeowner grant + Streets for People Grant. |
| 0070 - EQUIPMENT & EQUIPMENT RENTAL | \$53,500 | \$17,800 | (\$35,700) | \$17,799 | Reduced budget as part of mid-year pandemic cuts. | \$52,900 | \$52,900 | \$0 | \$51,994 | | \$52,900 | \$52,900 | \$0 | \$0 | IT hardware and software. |
| NON-PERSONNEL SERVICES Total | \$3,764,554 | \$3,354,860 | (\$409,694) | \$2,941,218 | | \$1,406,174 | \$1,351,174 | (\$55,000) | \$1,179,345 | | \$6,257,651 | \$6,594,209 | \$336,558 | \$33,138 | |

Attachment Q14



OFFICE OF PLANNING

FY 2020 - 2022 Budgets & Expenditures (through January 31, 2022)

| Comp Source Group | FY 2020 | | | | Comments | FY 2021 | | | | Comments | FY 2022 | | | Year-to-Date Expenditures | Comments |
|---|------------------|------------------|------------------|------------------|---|------------------|------------------|-------------------|------------------|--|------------------|------------------|------------------|---------------------------|--|
| | Original Budget | Revised Budget | Budget Variance | Expenditures | | Original Budget | Revised Budget | Budget Variance | Expenditures | | Original Budget | Revised Budget | Budget Variance | | |
| LOCAL Fund Total | \$13,683,609 | \$13,354,990 | (\$328,619) | \$12,834,428 | | \$11,314,876 | \$11,425,678 | \$110,802 | \$11,192,137 | | \$16,964,114 | \$17,300,672 | \$336,558 | \$3,322,940 | |
| FEDERAL GRANTS | | | | | | | | | | | | | | | |
| 0011 - REGULAR PAY - CONT FULL TIME | \$390,277 | \$401,974 | \$11,697 | \$394,712 | HP grant from National Park Service, supports 3.5 OP FTE. | \$394,614 | \$377,531 | (\$17,083) | \$377,496 | HP grant from National Park Service, supports 3.5 OP FTE. Budget reduced to level of expenditures for carryover to FY 2022. | \$400,874 | \$410,874 | \$10,000 | \$132,583 | HP grant from National Park Service, supports 3.5 OP FTE. |
| 0014 - FRINGE BENEFITS - CURR | \$84,690 | \$85,864 | \$1,174 | \$93,465 | | \$85,631 | \$76,962 | (\$8,669) | \$76,962 | | \$87,391 | \$89,891 | \$2,500 | \$26,126 | |
| PERSONNEL SERVICES Total | \$474,967 | \$487,838 | \$12,871 | \$488,177 | | \$480,245 | \$454,493 | (\$25,752) | \$454,458 | | \$488,265 | \$500,765 | \$12,500 | \$158,709 | |
| 0020 - SUPPLIES AND MATERIALS | \$0 | \$0 | \$0 | \$0 | | \$0 | \$0 | \$0 | \$0 | | \$0 | \$0 | \$0 | \$0 | |
| 0041 - CONTRACTUAL SERVICES - OTHER | \$50,033 | \$80,827 | \$30,794 | \$80,524 | | \$61,792 | \$75,338 | \$13,546 | \$75,338 | Contracts and grants to support HP activities. | \$57,735 | \$150,291 | \$92,556 | \$22,927 | Contracts and grants to support HP activities. |
| | \$50,033 | \$80,827 | \$30,794 | \$80,524 | Revised budget: increase from Historic Preservation Fund federal grant - unspent FY 2019 carryover. | \$61,792 | \$75,338 | \$13,546 | \$75,338 | | \$57,735 | \$150,291 | \$117,556 | \$22,927 | |
| NON-PERSONNEL SERVICES Total | | | | | | | | | | | | | | | |
| Federal Grant Funds Total | \$525,000 | \$568,665 | \$43,665 | \$568,701 | | \$542,037 | \$529,831 | (\$12,206) | \$529,796 | | \$546,000 | \$651,056 | \$130,056 | \$181,636 | |
| PRIVATE GRANTS | | | | | | | | | | | | | | | |
| 0011 - REGULAR PAY - CONT FULL TIME | \$0 | \$0 | \$0 | \$0 | | \$0 | \$20,717 | \$20,717 | \$20,717 | | \$0 | \$24,242 | \$24,242 | \$0 | |
| 0014 - FRINGE BENEFITS - CURR PERSONNEL | \$0 | \$0 | \$0 | \$0 | | \$0 | \$4,499 | \$4,499 | \$4,499 | | \$0 | \$5,257 | \$5,257 | \$0 | |
| | \$0 | \$0 | \$0 | \$0 | | \$0 | \$25,216 | \$25,216 | \$25,216 | Time and effort paid for by the Urban Institute grant for "Upward Mobility" project. Remaining balance carried forward to FY 2022. | \$0 | \$29,499 | \$29,499 | \$0 | Urban Institute private grant for "Upward Mobility" project. Carried forward from FY 2021. |
| PERSONNEL SERVICES Total | | | | | | | | | | | | | | | |
| 0041 - CONTRACTUAL SERVICES - OTHER | \$10,001 | \$320,000 | \$309,999 | \$320,000 | Revised budget includes private grants from ArtPlace (\$240K; playable art) and Kresge Foundation (\$80K; placemaking). | \$10,000 | \$22,060 | \$12,060 | \$22,060 | Includes Marshall Heights Comm. Development Org. grant project to support Penn. Ave. SE (activation), spending National Trust grant to support HistoryQuest, and spending Urban Institute grant to create "Upward Mobility" website. | \$10,000 | \$20,940 | \$10,940 | \$10,000 | Marshall Heights Comm. Development Org. grant project to support Penn. Ave. SE. |
| 0050 - SUBSIDIES AND TRANSFERS | \$0 | \$0 | \$0 | \$0 | | \$0 | \$60,000 | \$60,000 | \$60,000 | Subgrants to community orgs paid for by the Urban Institute grant for "Upward Mobility" project. Remaining balance carried forward to FY 2022. | \$0 | \$2,250 | \$2,250 | \$0 | Carryover funding from the Urban Institute grant for the "Upward Mobility" project. |
| NON-PERSONNEL SERVICES Total | \$10,001 | \$320,000 | \$309,999 | \$320,000 | | \$10,000 | \$82,060 | \$72,060 | \$82,060 | | \$10,000 | \$23,190 | \$13,190 | \$10,000 | |
| Private Grant Funds Total | \$10,001 | \$320,000 | \$309,999 | \$320,000 | | \$10,000 | \$107,276 | \$97,276 | \$107,276 | | \$10,000 | \$52,689 | \$42,689 | \$10,000 | |
| SPECIAL PURPOSE REVENUE | | | | | | | | | | | | | | | |
| 0040 - OTHER SERVICES AND CHARGES | \$200,000 | \$18,071 | (\$181,929) | \$18,071 | Budget split into 0040 (to pay stipends for HPRB members) and 0041 (to pay for projects and grants to support historic preservation in the District). | \$15,000 | \$9,956 | (\$5,044) | \$9,956 | Stipends for HPRB members. | \$15,000 | \$15,000 | \$0 | \$1,981 | Stipends for HPRB members. |

Attachment Q14



OFFICE OF PLANNING

FY 2020 - 2022 Budgets & Expenditures (through January 31, 2022)

| Comp Source Group | FY 2020 | | | | Comments | FY 2021 | | | | Comments | FY 2022 | | | Year-to-Date Expenditures | Comments |
|-------------------------------------|---------------------|---------------------|-------------------|---------------------|---|---------------------|---------------------|------------------|---------------------|---|---------------------|---------------------|------------------|---------------------------|----------|
| | Original Budget | Revised Budget | Budget Variance | Expenditures | | Original Budget | Revised Budget | Budget Variance | Expenditures | | Original Budget | Revised Budget | Budget Variance | | |
| 0041 - CONTRACTUAL SERVICES - OTHER | \$0 | \$119,015 | \$119,015 | \$119,015 | Non-lapsing fund. Note that the OCFO reduces the Budget to the Expenditures amount at year-end. | \$135,000 | \$32,964 | (\$102,036) | \$31,964 | Purchases to support HP with these o-type funds. | \$85,000 | \$85,000 | \$0 | \$4,553 | |
| NON-PERSONNEL SERVICES Total | \$200,000 | \$137,086 | (\$62,914) | \$137,086 | | \$150,000 | \$42,920 | (\$107,080) | \$41,920 | | \$100,000 | \$100,000 | \$0 | \$6,534 | |
| Special Purpose Revenue Total | \$200,000 | \$137,086 | (\$62,914) | \$137,086 | | \$150,000 | \$42,920 | (\$107,080) | \$41,920 | Budget authority reduced in FY 2021 as funds were swept as part of COVID cuts. | \$100,000 | \$100,000 | \$0 | \$6,534 | |
| INTRA-DISTRICT TRANSFERS | | | | | | | | | | | | | | | |
| 0015 - OVERTIME PAY | \$0 | \$8,555 | \$8,555 | \$8,555 | Federal FEMA reimbursement (via HSEMA) for pandemic-related overtime | \$0 | \$0 | \$0 | \$0 | | \$0 | \$0 | \$0 | \$0 | |
| 0041 - CONTRACTUAL SERVICES - OTHER | \$0 | \$25,000 | \$25,000 | \$24,550 | Agreement w/DHCD for a Far SE/SW Housing Cost Study. | \$0 | \$69,800 | \$69,800 | \$69,800 | Agreement with DMPED to fund the purchase of redistricting software to aid District Census efforts. | \$0 | \$0 | \$0 | \$0 | |
| NON-PERSONNEL SERVICES Total | \$0 | \$25,000 | \$25,000 | \$24,550 | | \$0 | \$69,800 | \$69,800 | \$69,800 | | \$0 | \$0 | \$0 | \$0 | |
| Intra-District Transfer Total | \$0 | \$25,000 | \$25,000 | \$24,550 | | \$0 | \$69,800 | \$69,800 | \$69,800 | | \$0 | \$0 | \$0 | \$0 | |
| TOTAL OFFICE OF PLANNING | \$14,418,610 | \$14,405,741 | (\$12,869) | \$13,884,765 | | \$12,016,913 | \$12,175,505 | \$158,592 | \$11,940,929 | | \$17,620,114 | \$18,104,417 | \$484,303 | \$3,521,110 | |