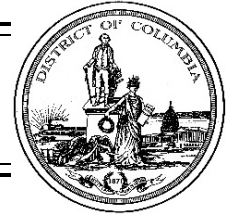

OFFICE OF AT-LARGE COUNCILMEMBER ANITA BONDS
CHAIR, COMMITTEE ON EXECUTIVE ADMINISTRATION & LABOR



January 12, 2023

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

Dear Senior Advisor Perry:

The annual performance oversight hearing for the Office of the Senior Advisor is scheduled for **Friday, February 10, 2023, beginning at 9:30 AM**. The hearing will be held virtually, and government witness(es) will testify following public testimony. Please plan to arrive in time to listen to the entirety of the public testimony presented with respect to the agency. Pursuant to Council rule 522(a), we ask all executive witness(es) to submit their hearing testimony 48 hours in advance of their performance oversight hearing.

Written pre-hearing questions for your agency are attached. Please provide **five hard copies** of your responses as well as electronic versions in Microsoft Word and PDF format **by no later than 5:00 PM on Friday, February 3, 2023**, one week before the hearing to account for the time constraints in between receiving these questions and the hearing date.

If you feel that I could use additional information outside the scope of the attached questions, please feel free to include an additional written statement. If your office requires clarification on any of the attached questions, please contact Kevin Chavous at kchavous@dccouncil.gov. Thank you in advance for your timely and comprehensive response.

Sincerely,

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

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

Office of the Senior Advisor

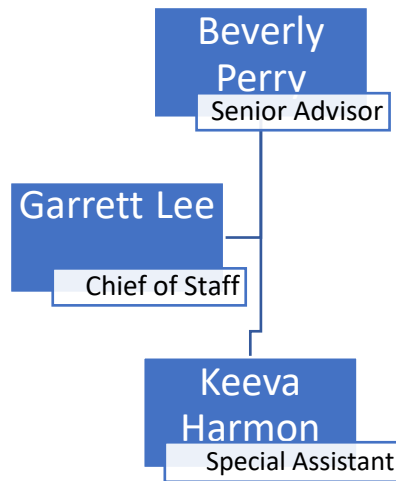
OSA FY 2023 PERFORMANCE OVERSIGHT QUESTIONS

Standard Agency Questions

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

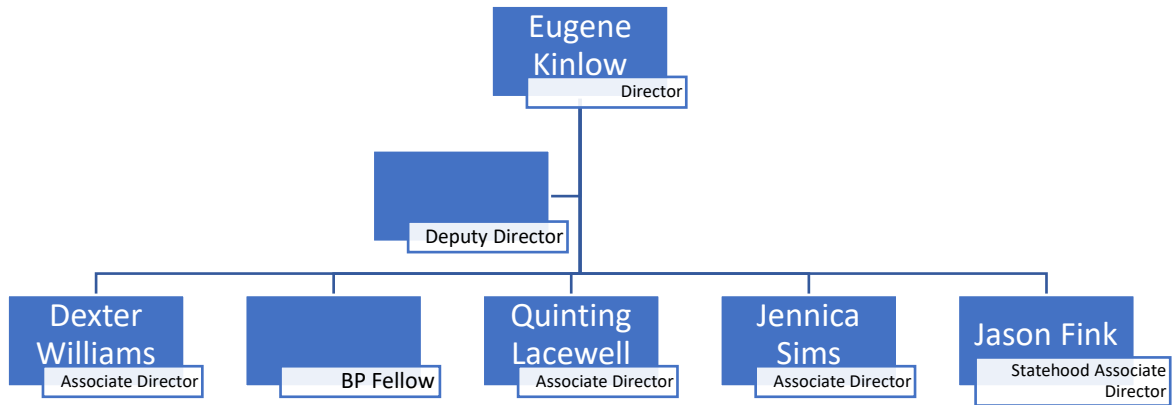
Response:

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

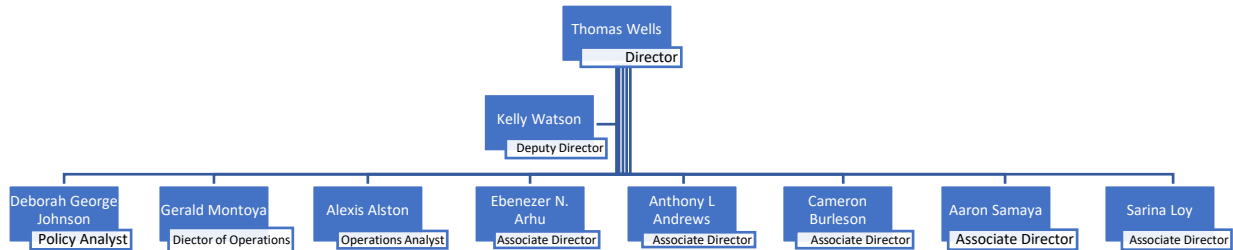


Office of the Senior Advisor

Attachment 2: Office of Federal and Regional Affairs Organizational Chart



Attachment 3: Office of Policy and Legislative Affairs



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

Office of the Senior Advisor

Response:

Program	CostCenter	Title	Position Number	Salary	Fringe	Hire Date	Reg/Temp/Term	Vacant Status	FTE
100152	50093	Associate Director	00071737	100254.49	16,642.25	8/29/2022	Reg	F	1
100152	50093	Associate Director	00073366	100254.49	16,642.25	8/29/2022	Reg	F	1
100152	50093	Associate Director	00087625	129244.88	21,454.65	5/18/2015	Reg	F	1
100152	50093	Beverly Perry Fellow	00085927	80784	13,410.14	(blank)	(blank)	V	1
100152	50093	Deputy Director	00048620	133122	22,098.25	(blank)	(blank)	V	1
100152	50093	Director, Federal and Regional	00073609	153760.67	25,524.27	11/16/2015	Reg	F	1
100152	50093	Senior Associate Director	00042864	105266.94	17,474.31	10/21/2019	Reg	F	1
100154	50091	Chief of Staff	00088192	132057.34	21,921.52	10/15/2019	Reg	F	1
100154	50091	Senior Advisor	00087624	230626.79	38,284.05	1/2/2015	Reg	F	1
100154	50091	Special Assistant	00088335	85791.36	14,241.37	8/29/2022	Reg	F	1
100155	50092	Administrative Support Special	00047250	80776.21	13,408.85	3/4/2013	Reg	F	1
100155	50092	Associate Director	00094543	100309.13	16,651.32	10/28/2019	Reg	F	1
100155	50092	Associate Director of Legislat	00046831	100309.13	16,651.32	1/8/2018	Reg	F	1
100155	50092	Associate Director of Legislat	00073530	100309.13	16,651.32	10/12/2004	Reg	F	1
100155	50092	Associate Director of Legislat	00097451	116483	19,336.18	(blank)	(blank)	V	1
100155	50092	Associate Director of Legislat	00097452	116483	19,336.18	(blank)	(blank)	V	1
100155	50092	Deputy Director	00088334	116483	19,336.18	(blank)	(blank)	V	1
100155	50092	Dir, Pol & Legislative Affairs	00046520	203449.02	33,772.54	1/1/2023	Reg	F	1
100155	50092	Director of Operations	00095168	80776.38	13,408.88	9/8/2014	Reg	F	1
100155	50092	Policy Analyst	00044561	100254.55	16,642.26	1/24/2011	Reg	F	1
Grand Total									20

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

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

4. Please provide the Committee with:
 - a. A list of all employees who received or retained cellphones, personal digital assistants, or similar communications devices at agency expense in FY22 and FY23 to date;

A10 Cellphones, Personal Digital Assistants Or Similar Communications Devices		
First Name	Last Name	Device Type
BEVERLY	PERRY	IPHONE XR
BRITTANY	KENT	IPHONE 7
BRYAN	HUM	IPHONE 7
QUINTING	LACEWELL	IPHONE XR
DANIELLE	FREEDMAN	IPHONE 6
DEBORAH	GEORGE JOHNSON	IPHONE 7
DECLAN	KINGLAND	IPHONE 8
REEVES CENTER	KIOSK	4GLTE SIM CARD PACK

Office of the Senior Advisor

EOM	ATC	IPAD PRO 9.7"
UNION STATION	KIOSK	4GLTE SIM CARD PACK
CONVENTION CENTER	KIOSK	4GLTE SIM CARD PACK
ERIKA	DUTHELY	IPHONE 7
EUGENE	KINLOW	IPHONE 6
GARRETT	LEE	IPAD 12.9
GARRETT	LEE	IPHONE XR
GERALD	MONTOYA	IPHONE 6S
DARNEESHA POLEE	CHAPIN	IPHONE XR
KELLY	WATSON	IPHONE 6S
BUKET	DEMIRCI	IPHONE XR
ALEXIS	ALSTON	IPHONE 8
RONAN	GULSTONE	IPHONE 8

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

BEVERLY	PERRY	AT&T	Cellular	\$ 144.78	\$ 48.26	\$ 48.26	\$ 48.26
BRITTANY	KENT	Verizon	Cellular	\$ 128.97	\$ 42.99	\$ 42.99	\$ 42.99
BRYAN	HUM	AT&T	Cellular	\$ 144.78	\$ 48.26	\$ 48.26	\$ 48.26
CALVIN	OSBORNE	AT&T	Cellular	\$ 135.87	\$ 45.29	\$ 45.29	\$ 45.29
DANIELLE	FREEDMAN	AT&T	Cellular	\$ 144.78	\$ 48.26	\$ 48.26	\$ 48.26
DEBORAH	GEORGEJOHNSON	AT&T	Cellular	\$ 165.87	\$ 55.29	\$ 55.29	\$ 55.29
DECLAN	KINGLAND	Verizon	Cellular	\$ 128.97	\$ 42.99	\$ 42.99	\$ 42.99
DARNEESHA	POLEE	AT&T	Cellular	\$ 144.78	\$ 48.26	\$ 48.26	\$ 48.26
REEVESCENTER	KIOSK	Verizon	Cellular	\$ 89.97	\$ 29.99	\$ 29.99	\$ 29.99
SPARE	SPARE	Verizon	Tablet with wireless service	\$ 98.97	\$ 32.99	\$ 32.99	\$ 32.99
OSABURNER	PHONE1	AT&T	Cellular	\$ 153.48	\$ 51.16	\$ 51.16	\$ 51.16
OSABURNER	PHONE2	AT&T	Cellular	\$ 153.48	\$ 51.16	\$ 51.16	\$ 51.16

Office of the Senior Advisor

OSABURNER	PHONE3	AT&T	Cellular	\$ 153.48	\$ 51.16	\$ 51.16	\$ 51.16
OSABURNER	PHONE5	AT&T	Cellular	\$ 153.48	\$ 51.16	\$ 51.16	\$ 51.16
OSABURNER	PHONE6	AT&T	Cellular	\$ 153.48	\$ 51.16	\$ 51.16	\$ 51.16
OSABURNER	PHONE8	AT&T	Cellular	\$ 153.48	\$ 51.16	\$ 51.16	\$ 51.16
OSABURNER	PHONE7	AT&T	Cellular	\$ 153.48	\$ 51.16	\$ 51.16	\$ 51.16
OSABURNER	PHONE9	AT&T	Cellular	\$ 153.48	\$ 51.16	\$ 51.16	\$ 51.16
OSABURNER	PHONE10	AT&T	Cellular	\$ 153.48	\$ 51.16	\$ 51.16	\$ 51.16
OSABURNER	PHONE11	AT&T	Cellular	\$ 153.48	\$ 51.16	\$ 51.16	\$ 51.16
OSABURNER	PHONE12	AT&T	Cellular	\$ 153.48	\$ 51.16	\$ 51.16	\$ 51.16
OSABURNER	PHONE14	AT&T	Cellular	\$ 153.48	\$ 51.16	\$ 51.16	\$ 51.16
OSABURNER	PHONE15	AT&T	Cellular	\$ 153.48	\$ 51.16	\$ 51.16	\$ 51.16
OSABURNER	PHONE13	AT&T	Cellular	\$ 153.48	\$ 51.16	\$ 51.16	\$ 51.16
OSABURNER	PHONE4	AT&T	Cellular	\$ 153.48	\$ 51.16	\$ 51.16	\$ 51.16
SPARE	SPARE	AT&T	Cellular	\$ 135.87	\$ 45.29	\$ 45.29	\$ 45.29
UNIONSTATION	KIOSK	Verizon	Cellular	\$ 89.97	\$ 29.99	\$ 29.99	\$ 29.99
CONVENTIONCENTER	KIOSK	Verizon	Cellular	\$ 89.97	\$ 29.99	\$ 29.99	\$ 29.99
SPARE	SPARE	AT&T	Air-Card/ MiFi	\$ 74.13	\$ 41.23	\$ (8.77)	\$ 41.67
KELLY	WATSON	AT&T	Air-Card/ MiFi	\$ 73.69	\$ 41.23	\$ (8.77)	\$ 41.23
SPARE	SPARE	Verizon	Tablet with wireless service	\$ 98.97	\$ 32.99	\$ 32.99	\$ 32.99
BUKET	DEMIRCI	AT&T	Cellular	\$ 128.97	\$ 42.99	\$ 42.99	\$ 42.99
ERIKA	DUTHELY	AT&T	Cellular	\$ 144.78	\$ 48.26	\$ 48.26	\$ 48.26
EUGENE	KINLOW	AT&T	Cellular	\$ 146.42	\$ 48.26	\$ 48.26	\$ 49.90
GARRETT	LEE	Verizon	Cellular	\$ 89.97	\$ 29.99	\$ 29.99	\$ 29.99
GARRETT	LEE	AT&T	Cellular	\$ 144.78	\$ 48.26	\$ 48.26	\$ 48.26
GERALD	MONTOYA	AT&T	Cellular	\$ 144.78	\$ 48.26	\$ 48.26	\$ 48.26
SPARE	SPARE	AT&T	Cellular	\$ 144.78	\$ 48.26	\$ 48.26	\$ 48.26
SPARE	SPARE	AT&T	Cellular	\$ 135.87	\$ 45.29	\$ 45.29	\$ 45.29
ROBIN	RUBIN	AT&T	Cellular	\$ 144.78	\$ 48.26	\$ 48.26	\$ 48.26

Office of the Senior Advisor

RONAN	GULSTONE	AT&T	Cellular	\$ 144.78	\$ 48.26	\$ 48.26	\$ 48.26
RONAN	GULSTONE	AT&T	Cellular	\$ 111.69	\$ 37.23	\$ 37.23	\$ 37.23
SARINA	LOY	AT&T	Cellular	\$ 144.78	\$ 48.26	\$ 48.26	\$ 48.26
SPARE	SPARE	AT&T	Cellular	\$ 135.87	\$ 45.29	\$ 45.29	\$ 45.29
SPARE	SPARE	Verizon	Tablet with wireless service	\$ 98.97	\$ 32.99	\$ 32.99	\$ 32.99
Tristan	Kirkman	AT&T	Cellular	\$ 44.78	\$ 48.26	\$ (51.74)	\$ 48.26

- c. A list of all vehicles owned, leased, or otherwise used by the agency and to whom the vehicle is assigned, as well as a description of all vehicle accidents involving the agency’s vehicles in FY22 and FY23 to date:

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

- d. A list of travel expenses, arranged by employee for FY22 and FY23 to date, including the justification for travel; and

Response: There are no travel expenses and reimbursements arranged by employee for FY22 and FY23 to date.

- e. A list of the total workers’ compensation payments paid in FY22 and FY23 to date, including the number of employees who received workers’ compensation payments, in what amounts, and for what reasons.

Response: There are no overtime and workman’s compensation payments paid in FY22 and FY23 to date.

5. For FY22 and FY23 to date, please list all intra-District transfers to or from the agency.

Fiscal Year	Seller	Buyer	Service Description	Total Amount
FY 2022	EOM	OSA	Support services	8,000.00
FY 2023	N/A			

6. For FY22 and FY23 to date, please identify any special purpose revenue funds maintained by, used by, or available for use by the agency. For each fund identified, provide:

- The revenue source name and code;
- The source of funding;
- A description of the program that generates the funds;
- The amount of funds generated by each source or program;
- Expenditures of funds, including the purpose of each expenditure; and

Office of the Senior Advisor

f. The current fund balance.

Response: Not applicable

7. Please list all memoranda of understanding (“MOU”) entered into by your agency during FY22 and FY23 to date, as well as any MOU currently in force. For each, indicate the date on which the MOU was entered and the termination date.

Response:

Fiscal Year	Vendor	Service Period	Service Description	Amount
FY 2022	OCTANE, LLC	10/01/2021 - 09/30/2022	Statehood initiative	369,461.84
	THE GROUP DC, LLC	10/01/2021 - 09/30/2022	Consulting on COVID-19 funding	165,000.00
FY 2023	THE GROUP DC, LLC	10/01/2022 - 09/30/2023	Consulting on COVID-19 funding	500,000.00

8. Please list the ways, other than MOU, in which the agency collaborated with analogous agencies in other jurisdictions, with federal agencies, or with non-governmental organizations in FY22 and FY23 to date.

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

9. Please provide a table showing your agency’s Council-approved original budget, revised budget (after reprogrammings, etc.), and actual spending, by program and activity, for FY20, FY21, FY22, and FY23 to date.

a. For each program and activity, please include total budget and break down the budget by funding source (federal, local, special purpose revenue, or intra-district funds).

FISCAL_YEAR	Program	Program Title	Activity	Activity Title	Approp Fund	Approp Fund Title	Approved Budget	Revised Budget	Expenditures
2020	1000	AGENCY MANAGEMENT	1090	PERFORMANCE MANAGEMENT	0100	LOCAL FUND	489,361.87	489,361.87	443,937.24
	2000	OFFICE OF POLICY AND LEGISLATIVE AFFAIRS	2001	POLICY AND LEGISLATIVE AFFAIRS	0100	LOCAL FUND	1,366,506.61	1,271,681.61	1,283,827.26
	3000	OFFICE OF FEDERAL AND REGIONAL AFFAIRS	3001	FEDERAL AND REGIONAL AFFAIRS	0100	LOCAL FUND	1,607,969.52	1,521,200.52	1,411,263.03
2020 Total							3,463,838.00	3,282,244.00	3,139,027.53
2021	1000	AGENCY MANAGEMENT	1090	PERFORMANCE MANAGEMENT	0100	LOCAL FUND	694,403.90	662,041.06	639,918.18
	2000	OFFICE OF POLICY AND LEGISLATIVE AFFAIRS	2001	POLICY AND LEGISLATIVE AFFAIRS	0100	LOCAL FUND	1,309,179.04	1,329,383.08	1,350,197.53
	3000	OFFICE OF FEDERAL AND REGIONAL AFFAIRS	3001	FEDERAL AND REGIONAL AFFAIRS	0100	LOCAL FUND	1,340,226.06	1,394,203.86	1,362,747.58
2021 Total							3,343,809.00	3,385,628.00	3,352,863.29
2022	1000	AGENCY MANAGEMENT	1090	PERFORMANCE MANAGEMENT	0100	LOCAL FUND	562,390.80	512,390.80	464,287.20
	2000	OFFICE OF POLICY AND LEGISLATIVE AFFAIRS	2001	POLICY AND LEGISLATIVE AFFAIRS	0100	LOCAL FUND	1,234,062.10	1,234,062.10	1,205,702.15
	3000	OFFICE OF FEDERAL AND REGIONAL AFFAIRS	3001	FEDERAL AND REGIONAL AFFAIRS	0100	LOCAL FUND	1,612,865.56	1,577,365.56	1,448,039.25
2022 Total							3,409,318.46	3,323,818.46	3,118,028.60
2023	100152	FEDERAL AND REGIONAL AFFAIRS	50093	OFFICE OF FEDERAL AND REGIONAL AFFAIRS	1010001	LOCAL FUNDS	2,580,705.73	2,580,705.73	894,008.12
	100154	PERFORMANCE AND STRATEGIC MANAGEMENT	50091	OFFICE OF THE SENIOR ADVISOR	1010001	LOCAL FUNDS	633,335.41	633,335.41	95,471.48
	100155	POLICY AND LEGISLATIVE AFFAIRS	50092	OFFICE OF POLICY AND LEGISLATIVE AFFAIRS	1010001	LOCAL FUNDS	1,332,267.95	1,332,267.95	173,378.32
2023 Total							4,546,309.09	4,546,309.09	1,162,857.92

Office of the Senior Advisor

10. Please provide as an attachment a chart showing the agency’s overall funding by source and program for FY22 and FY23 to date. Please breakdown into the following:
- a. Name and amount of federal source of funding agency and program, broken down in percentage (%) and dollar amount (\$).
 - b. Name and amount of local source of funding agency and program, broken down in percentage (%) and dollar amount (\$).
 - c. Identify whether each funding source is recurring or one-time.
 - d. Identify whether recurring funds fluctuate in amount, the range of fluctuations, and why.

FISCAL_YEAR	Approp Fund	Approp Fund Title	Program	Program Title	Approved Budget	Funding Percentage	Recurring	One-time
2022	0100	LOCAL FUND	1000	AGENCY MANAGEMENT	562,390.80	100% Local Fund	562,390.80	
	0100	LOCAL FUND	2000	OFFICE OF POLICY AND LEGISLATIVE AFFAIRS	1,234,062.10	100% Local Fund	1,234,062.10	
	0100	LOCAL FUND	3000	OFFICE OF FEDERAL AND REGIONAL AFFAIRS	1,612,865.56	100% Local Fund	1,612,865.56	
2022 Total					3,409,318.46		3,409,318.46	0.00
2023	1010001	LOCAL FUNDS	100152	FEDERAL AND REGIONAL AFFAIRS	2,580,705.73	100% Local Fund	1,580,705.73	1,000,000.00
	1010001	LOCAL FUNDS	100154	PERFORMANCE AND STRATEGIC MANAGEMENT	633,335.41	100% Local Fund	633,335.41	
	1010001	LOCAL FUNDS	100155	POLICY AND LEGISLATIVE AFFAIRS	1,332,267.95	100% Local Fund	1,332,267.95	
2023 Total					4,546,309.09		3,546,309.09	1,000,000.00

11. Please provide the following information regarding capital projects:
- a. A list of all capital projects in the financial plan.
 - b. For FY20, FY21, FY22, and FY23 an update on all capital projects under the agency’s purview, including a status report on each project, the timeframe for project completion, the amount budgeted, actual dollars spent, and any remaining balances, to date.
 - c. An update on all capital projects planned for FY23, FY24, FY25, FY26, and FY27.
 - d. A description of whether the capital projects begun, in progress, or concluded in FY20, FY21, FY22, or FY23 to date, had an impact on the operating budget of the agency. If so, please provide an accounting of such impact.

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

12. Please provide a list of all budget enhancement requests (including capital improvement needs) for FY21, FY22, FY23 to date. For each, include a description of the need and the amount of funding requested.

Response: Not applicable to OSA, OFRA or OPLA.

Office of the Senior Advisor

13. Please list, in chronological order, each reprogramming in FY22 and FY23 to date, that impacted the agency, including those that moved funds into the agency, out of the agency, and within the agency. Include the revised, final budget for your agency after the reprogrammings for FY22 and FY23 to date. For each reprogramming, list the date, amount, rationale, and reprogramming number.

FISCAL_YEAR	Date	From/To Agency	Nationale	Reprogramm ing Number	From/To CSG	Amount
2022	11/16/2021	Within AIO/OSA	Funds are needed for the membership and subscription service fees and equipments	BJAI1116	OTHER SERVICES AND CHARGES	(40,000.00)
		Within AIO/OSA			SUPPLIES AND MATERIALS	35,000.00
		Within AIO/OSA			EQUIPMENT & EQUIPMENT RENTAL	5,000.00
	5/18/2022	From AEO/Office of the City Administration to AIO/OSA	The Office of the City Administration (AEO) requests to reprogram \$40,000.00 in local funds to the Office of the Senior Advisor (AIO) to support African-American Mayor's Association and Emancipation Day activities.	BJAI0425	OTHER SERVICES AND CHARGES	40,000.00
	6/6/2022	Within AIO/OSA	Funds are needed for the membership and subscription service fees	BJAI0606	REGULAR PAY - CONT FULL TIME	(100,000.00)
					OTHER SERVICES AND CHARGES	100,000.00
	9/9/2022	From AIO/OSA to BAO/OS	Funds are needed for Office of the Secretary to maintain its operation	BJ0BA022	REGULAR PAY - CONT FULL TIME	(125,500.00)
		FRINGE BENEFITS - CURR PERSONNEL			(15,000.00)	
2022 Total						(100,500.00)
2023	There is no reprogramming in FY 2023 as of today					

14. Please list each grant or sub-grant received by your agency in FY22 and FY23 to date. List the date, amount, source, purpose of the grant or sub-grant received, and amount expended.
- a. How many FTEs are dependent on grant funding? What are the terms of this funding? If it is set to expire, what plans, if any, are in place to continue funding the FTEs?

Response: Not applicable

15. Please list each contract, procurement, and lease; entered-into, extended, and option years exercised by your agency during FY22 and FY23 to date. For each contract, please provide the following information, where applicable:
- The name of the contracting party;
 - The nature of the contract, including the end product or service;
 - The dollar amount of the contract, including amount budgeted and amount actually spent;
 - The term of the contract;
 - Whether the contract was competitively bid;
 - The name of the agency's contract monitor and the results of any monitoring activity; and
 - The funding source.

Office of the Senior Advisor

Response:

Fiscal Year	Vendor	Service Period	Service Description	Amount
FY 2022	OCTANE, LLC	10/01/2021 - 09/30/2022	Statehood initiative	369,461.84
	THE GROUP DC, LLC	10/01/2021 - 09/30/2022	Consulting on COVID-19 funding	165,000.00
FY 2023	THE GROUP DC, LLC	10/01/2022 - 09/30/2023	Consulting on COVID-19 funding	500,000.00

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

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

17. Please list all settlements entered into by the agency or by the District on behalf of the agency in FY22 or FY23 to date, and provide the parties' names, the amount of the settlement, and if related to litigation, the case name, and a brief description of the case. If unrelated to litigation, please describe the underlying issue or reason for the settlement (e.g., administrative complaint, etc.).

Response: Not applicable

18. Please list the administrative complaints or grievances that the agency received in FY22 and FY23 to date, broken down by source. Please describe the process utilized to respond to any complaints and grievances received and any changes to agency policies or procedures that have resulted from complaints or grievances received. For any complaints or grievances that were resolved in FY22 or FY23 to date, describe the resolution.

Response: Not applicable

19. Please describe the agency's procedures for reporting and investigating allegations of sexual harassment or misconduct committed by or against its employees. List and describe any allegations received by the agency in FY22 and FY23 to date, regardless of whether or not those allegations were resolved.

Response:

The Office of the Senior Advisor follows the procedures of Mayor's Order 2017-313 with respect to any sexual harassment allegation. In FY22 and FY23 there were no allegations of sexual harassment by or against members of the Office of the Senior Advisor Cluster

Office of the Senior Advisor

20. Please list and describe any ongoing investigations, audits, or reports on the agency or any employee of the agency, or any investigations, studies, audits, or reports on the agency or any employee of the agency that were completed during FY22 and FY23 to date.

Response: Not applicable

21. Please describe any spending pressures the agency experienced in FY22 and any anticipated spending pressures for the remainder of FY23. Include a description of the pressure and the estimated amount. If the spending pressure was in FY22, describe how it was resolved, and if the spending pressure is in FY23, describe any proposed solutions.

Response: Not applicable

22. Please list any program activities (i.e., collaborations, initiatives, programs) that have been successful in FY22 and FY23 to date. Explain how/why they were successful. Indicate whether they were completed on time and within budget. If they were not, please provide an explanation.

Response: Not applicable

23. Please list and describe the agency's top objectives for the remainder of FY23 and FY24. If possible, please include projected timelines for each.

Response: See responses to Agency-Specific Questions below.

24. Please provide the number of FOIA requests for FY22 and FY23 to date, that were submitted to your agency. Include the number granted, partially granted, denied, and pending. In addition, please provide the average response time, the estimated number of FTEs required to process requests, the estimated number of hours spent responding to these requests, and the cost of compliance.

Response: FOIA requests submitted to the OSA are processed through the EOM. The information requested has been provided to the Secretary of the Council in the District Government FY 2022 FOIA Report.

25. Provide a list of all publications, brochures and pamphlets prepared by or for the agency during FY22 and FY23 to date (i.e., revised statehood plans).

Response: The Statehood Group sponsored Digital Media, social media ads and ad placements in Maine, Arizona and West Virginia.

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26. Please separately list each employee whose salary was \$100,000 or more in FY22 and FY23 to date. Provide the name, position number, position title, program, activity, salary, and fringe. In addition, state the amount of any overtime or bonus pay received by each employee on the list.

FY 2022	Posn Nbr	Title	Prgm Code	Activity	Salary	Fringe	Bonus	Overtime
Hum,Bryan Andrew	00046520	Interim Director	2001	2001	130,739.85	22,095.03	-	-
Kingland,Declan Leo	00048620	Deputy Director	3001	3001	128,836.43	21,773.36	-	-
Kinlow,Eugene D.	00073609	Director, Federal and Regional	3001	3001	150,010.41	25,351.76	-	-
LEE,GARRETT L	00088192	Chief of Staff	1090	1090	128,836.43	21,773.36	-	-
Perry,Beverly Lee	00087624	Senior Advisor	1090	1090	225,001.75	38,025.30	-	-
FY 2023	Posn Nbr	Title	Program	CostCenter	Salary	Fringe	Bonus	Overtime
Fink,Jason	00087625	Associate Director	100152	50093	129,244.88	21,454.65	-	-
George,Deborah A	00044561	Policy Analyst	100155	50092	100,254.55	16,642.26	-	-
Kent,Brittany R	00094543	Associate Director	100155	50092	100,309.13	16,651.32	-	-
Kinlow,Eugene D.	00073609	Director, Federal and Regional	100152	50093	153,760.67	25,524.27	-	-
Lacewell,Quinting	00042864	Senior Associate Director	100152	50093	105,266.94	17,474.31	-	-
LEE,GARRETT L	00088192	Chief of Staff	100154	50091	132,057.34	21,921.52	-	-
Loy,Sarina	00073530	Associate Director of Legislat	100155	50092	100,309.13	16,651.32	-	-
Perry,Beverly Lee	00087624	Senior Advisor	100154	50091	230,626.79	38,284.05	-	-
Sims,Jennica A.	00071737	Associate Director	100152	50093	100,254.49	16,642.25	-	-
Watson,Kelly E	00046831	Associate Director of Legislat	100155	50092	100,309.13	16,651.32	-	-
WELLS,THOMAS C	00046520	Dir, Pol & Legislative Affairs	100155	50092	203,449.02	33,772.54	-	-
Williams,Dexter O.	00073366	Associate Director	100152	50093	100,254.49	16,642.25	-	-

27. For FY22 and FY23 to date, please provide a list of employee bonuses or special pay granted that identifies the employee receiving the bonus or special pay, the amount received, and the reason for the bonus or special pay.

Response: Not applicable

28. If there are any boards or commissions associated with your agency, please provide a chart listing the names, confirmation dates, terms, wards of residence, and attendance of each member. Include any vacancies. Please also attach agendas and minutes of each board or commission meeting in FY22 or FY23 to date if minutes were prepared. Please inform the Committee if the board or commission did not convene during any month.

Response:

New Columbia Statehood Commission
Charles Hamilton Houston Commission

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

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

Response:

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

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

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

Response:

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

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

Response:

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

Racial Equity Questions

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

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

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

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

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

Response:

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

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

Response: Not applicable.

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

Response: Not applicable.

6. In your FY23 budget as approved, are there specific programs or allocations that are designed to address racial or economic inequities faced by District residents? In detail, please describe how these efforts address those inequities.

Response: Please see the answer to question number 3.

Agency-Specific Questions

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

Response:

- The Office of the Senior Advisor and the Office of Federal and Regional Affairs (OFRA) is the lead advocate for Statehood for the District. The staff work includes meeting with, and communications with congressional offices. We use polling and scientific methodologies to create messages that citizens outside of the District of Columbia may be receptive to. This data is useful in creating public awareness products for targeted use locally, regionally, and throughout out the nation.

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- Some of our products were developed to educate key constituencies including veterans, young people, taxpayers and senior citizens, and diverse communities.
- We utilized social media on a variety of platforms including Facebook, Instagram, the Statehood Website, YouTube, and other social engagement platforms to reach the largest possible audience.
- We have communicated with members of Congress and their staffs in an effort to answer their questions, educate them on the District's history, and better share information about our disenfranchisement, specifically, our lack of local control and representation.
- We work with our Shadow Delegation to collect information and develop strategies to advance Statehood.

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

Response:

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

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

Response:

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

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

Response:

- OFRA is working with our federal partners to allow for greater control, access, and utilization of federal properties.
- OFRA is proactive in finding opportunities within the Executive Office of the President, federal agencies and with the House of Representatives and Senate for the District.
- OFRA continues to educate Americans about District residents have no voting representation in Congress and will continue our work to increase awareness on why District residents deserve DC Statehood.

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4. Please list all rules that OPLA has published in FY21, FY22, and FY23, to date.

Response:

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

5. Please provide the number of nominations OPLA has submitted to the Council in FY22 and FY23, to date.

Response:

OPLA submitted approximately 300 nominations during FY22 and FY23, to date.

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

Response:

The OSA engages with our partners in other parts of District government to advance the priorities of the Bowser Administration. During the COVID pandemic, OFRA has worked to ensure that the District of Columbia received state level funding in all federal coronavirus appropriations. OFRA has also worked to engage federal agencies to ensure District agencies had relevant implementation guidance or notice of coronavirus grantmaking.

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

Response:

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

OFRA has been in contact with the Executive office of the President and participated in numerous calls designed to discuss how mayors, governors, municipalities, and counties are confronting the Covid pandemic. These calls are also opportunities to share our perspective

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on our local strategies, discuss federal actions and to engage with colleagues from other cities and states.

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

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

Response:

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

9. Since January of 2023, what District of Columbia-specific priorities have OSA highlighted for our federal partners in response to emerging needs, such as COVID variants, opioid abuse, and gun violence?

Response:

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

The plan's priority initiatives include:

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

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- Youth Safety; and
- Alternative 911 Response.

10. Has there been any consideration given to increasing the number of members of the Council prior to achieving DC Statehood?

Response: Not Applicable.

11. How is the Statehood office staffed (as in, are staffing decisions made by OSA or by the Office of the Secretary)? Does OSA make decisions about who receives statehood grants, or are those decisions made by the Office of the Secretary?

Response:

The Associate Director of Statehood is FTE supervised by the Director of OFRA. Statehood matters are also staffed by all OFRA Associate Directors.

The Statehood grant program is administered by Office of Secretary in consultation with OFRA and OSA.

12. Please describe the Senior Advisor's role in the planning and development of a new Office of Public Records building.
13. Please provide a detailed update on the new OPR building, including any changes in FY22 and FY23 to date. Please include a project timeline, and any discussions, meetings, and updates.
14. During FY22's Performance Oversight Hearing, witnesses for the Office of the Secretary shared their concerns with the lack of planning and limited public engagement for the DC Archive's project. How is OSA ensuring transparency in the planning process and encouraging public engagement?

Responses 12 – 14:

New DC Archives – The new archival facility will address the records center storage needs of the District and provide a facility that meets the standards for records centers. It will consolidate current collections in one location and anticipate ongoing needs for space and support services. The archive requires facilities with highly specialized technical building systems that provide the controlled and secure environments necessary to ensure the long-term safety of the collections. The new facility will provide better security for the collections and enhanced access for the public, while allowing for future expansion. The project includes the selective removal of University of District of Columbia (UDC) Building #41 and construction of a new purpose-built facility to accommodate the updated program for the Office of Public Records.

- a. The amount budgeted, actual dollars spent, and any remaining balances; \$75 million.
- b. Start Date: June 2022 -- Completion Date: Winter 2026
- c. Current status of the project: The Project restarted in June 2022 after pausing in 2018. The project team has completed the program requirements phase. Currently, the project is completing the Concept Design Phase and will move into schematic design phase.

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Currently the project team is in the Concept Design Phase. Starting in June 2022, the project team began meeting to complete the program requirements document. This document was developed by the team and submitted for public comments through September 30, 2022. Extensive comments were received from the Archives Advisory Group, the Friends of the DC Archives, and members of the general public. These changes were discussed, evaluated against National Archives and Records Administration standards and industry wide best practices. Where appropriate the comments were incorporated into the program requirements document.

Project Timeline:

Programming Phase: 5/13/2022 – 10/14/2022
Concept Design Phase: 8/19/2022 – 12/9/2022
Schematic Design: 12/9/2022 – 3/17/2023
Design Development: 3/17/2023 – 7/7/2023
Construction Documents: 7/7/2023 – 2/16/2023

Construction Phase

6/7/2024 – 7/11/2026

Meetings:

June 2022 –

- 06/3 – Kick off Discussion Meeting
- DGS and Architectural Firm begin Bi-Weekly Meetings
- 6/17 – General Program Requirements Discussion Meeting
- 6/24 – A/V Requirements Discussion
- 6/27 – Security Requirements Discussion

July 2022 –

- 7/12 – Archives Building Size Discussion Meeting
- 7/25 – Co-Location with UDC Discussion Meeting
- 7/26 – Archival Building Requirements General Discussion Meeting
- 07/28 – Discussion of MOA related to Felix Grant Jazz Archives and UDC University Archives

August 2022 –

- 8/16 - Programming Report Review Project Team Meeting
- 8/25 – Programming Report Review Project Team Meeting

September 2022 –

- 9/8 – DC Archives Project Team Presentation at the Archives Advisory Group meeting
- 9/14 – OPR Programming Report Public Meeting and Presentation
- 9/16 – Site Visit at UDC Building #41

October 2022 –

- 10/7 - Public Comments Review Meeting
- 10/13 - Public Comments Review Meeting and Discussion of changes to report
- 10/19 – Exhibit Design Conversation
- 10/27 – LEED Certification and Sustainability goals

December 2022 –

- 12/5 – Draft Concept Design Discussion
- 12/9 - Draft Concept Design Discussion
- 12/10 – Beginning of Bi-Weekly Project Team Meetings with OPR and UDC

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January 2023 –

- 1/10 - Bi-Weekly Project Team Meeting
- 1/13 - Technology Introduction Meeting with OCTO

State Archivist and Public Records Administrator Lopez Matthews Jr. regularly attends the Archives Advisory Group meeting. At these meeting he responds to questions, provides updated and receives feedback from the group. This feedback is then shared with the project team for discussion and incorporation into planning and development where appropriate. We have also had several informal conversations to update them on the status of updates at OPR.