

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. For senior level positions, indicate the date that the position was filled.

**Attachment #1**

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. The Schedule A also should indicate all vacant positions in the agency. Please do not include Social Security numbers.

**Attachment #2**

3. (a) How has DCRB resolved whether to hire: a Chief Operating Officer; a Chief Procurement Officer; a Director of Risk and Investment Compliance; and a General Counsel? Please explain.

i. **Chief Operating Officer:** DCRB's operational requirements currently are met by integrating functions of the Deputy Chief Financial Officer (in lieu of having a Chief Operating Officer) into key operational requirements related to contracts, administration issues, procurement, budgeting and financial management, in coordination with (and support of) the Executive Director and the CFO. To date, this approach has more effectively fulfilled DCRB's unique operating requirements as a pension fund. On an ongoing basis, DCRB will continue to evaluate the most effective use of its operating costs and budget.

ii. **Chief Procurement Officer:** DCRB has established a full procurement team with two senior procurement officers managed directly by our Deputy Chief Financial Officer, who manages the Agency's procurement, budgeting, and contract operations, as well as the integration of these functions with financial controls. This approach has streamlined contracting, budgeting, and accounts payable operations into a single, integrated process—while also improving the effective use of DCRB's operating budget.

iii. **Director of Investment Risk and Investment Compliance:** In 2023, this role was replaced with the *Senior Legal Counsel for Investments and Compliance* position. This role purposely was designed to be filled by a specialized attorney, to effectively manage all aspects of operational due diligence and compliance throughout the investment process, including ongoing compliance review with DCRB's *Director of Internal Audit*, pursuant to applicable laws and regulations.

iv. **General Counsel:** This position currently is filled on an interim basis. Later in FY26, the Agency anticipates filling the position on a permanent basis.

(b) In table format, not as an attachment, please list every vacant position, together with the date the position became vacant and its status (e.g. posted, offer letter sent, no action pending, etc.).

	Title	Current Status	Date position became vacant	Date most recently filled
a)	Executive Director	Filled	3/26/2021	9/7/2021
b)	Chief Operating Officer*	TBD	10/1/2017	N/A
c)	Chief Financial Officer	Filled	11/3/2023	5/5/2024
d)	Chief Investment Officer	Filled	7/30/21	10/11/2021
e)	Chief Benefits Officer	Filled	5/28/2021	10/10/2021
f)	Pension Administrator	Filled	Same position as above	Same position as above
g)	Chief Procurement Officer** (or senior ranking contract specialist	N/A	10/07/2022	N/A
h)	Chief Technology Officer (or Director of IT)	Filled	4/17/2018	10/15/2019
i)	Director of Human Resources	Filled	5/22/2011	5/23/2011
j)	Director of Internal Audit	Filled	12/06/2019	01/17/2023
k)	Director of Risk and Investment Compliance***	TBD	8/31/2022	N/A
l)	General Counsel****	Filled	5/6/2025	5/11/2025
m)	Freedom of Information Act Officer	Filled	N/A	N/A

*	<i>As the result of internal assessment of agency operations in 2022, the District of Columbia Retirement Board (DCRB) determined that there is not a near-term need for a COO function.</i>
**	<i>As the result of departmental realignment in 2023, DCRB moved its procurement function into the agency's Finance department.</i>
***	<i>Currently, investment compliance and risk-mitigation functions are performed by a specialist attorney in DCRB's Legal department.</i>
****	<i>This role currently is performed on an interim basis. DCRB's Interim General Counsel serves as the agency's FOIA Officer.</i>

4. Please list as of January 31 all employees detailed to or from your agency, if any, anytime this fiscal year. 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.

**There were no employees detailed to or from the District of Columbia Retirement Board (DCRB) as of January 31, 2026.**

5. (a) For fiscal year 2025, please list in descending order each employee whose annual salary was \$140,000 or more. For each employee listed provide the name, position title, salary, and amount of any overtime and any bonus pay.

**See table below. (Note: As of January 31, 2026, DCRB's Board of Trustees was in progress with their annual evaluation of the Executive Director's performance for fiscal 2025. The process is expected to conclude in March 2026 and will include the Board's decision regarding compensation.)**

FY2025				
Name	Title	Salary	Overtime	Bonus
Balestrieri, Gianpiero	Executive Director	\$307,230	\$0	
Sahm, Patrick	Chief Investment Officer	\$249,605	\$0	\$22,000
Hernandez, Daniel	Pension Administrator	\$244,407	\$0	\$14,000
Gormley, Paul	Director Internal Audit	\$230,760	\$0	\$10,000
Robinson, Kate	Interim General Counsel	\$230,760	\$0	\$10,000
van der Bunt, Samantha	Senior Investment Funds & Compliance Counsel	\$230,760	\$0	\$7,000
West, Leslie	Chief Financial Officer	\$230,625	\$0	\$15,000
Morgan, Lori	Deputy Chief Financial Officer	\$225,500	\$0	\$15,000
Murthy, Ram	Director of Information Technology	\$220,346	\$0	\$14,000
Edwards, Jaininne	Deputy Chief Benefits Officer	\$209,566	\$0	\$10,000
Canlas, Jamia	Sr. Investment Strategist	\$205,000	\$0	\$15,000
Tolani, Deepak	Sr. Investment Strategist	\$205,000	\$0	\$15,000
Valentine, Lawrence Vernon	Director of Human Resources	\$204,435	\$0	\$12,000
Smith, Lauren	Communications & PR Director	\$195,314	\$0	\$10,000
Mobley, David	Financial Manager	\$171,032	\$0	\$8,000
Burnett, Michaela	Senior IT Specialist Applications & Data Services	\$169,638	\$0	\$10,000
Ashford, Pamela	Retirement Services Manager	\$166,796	\$0	\$8,000
Thomas, Jacqueline	Manager, Quality Compliance & Projects	\$166,796	\$0	\$10,000
Harley, Jacques	Senior Budget Analyst	\$150,304	\$0	\$9,000
Reaves, Deborah	Business Operations Manager	\$150,304	\$0	
O'Neal, Rhonda	Senior Accountant	\$149,379	\$0	\$8,500
Tamboli, Nurulhasan	IT Specialist (Power Platform Developer)	\$148,625	\$0	\$8,000
Andrade, Diego	Senior IT Specialist Systems & Network Services	\$147,801	\$0	\$9,000
Carson, Rabinai	HR Compliance Specialist	\$145,550	\$0	\$10,000
Shafie, Farahnaz	Info Systems Security Officer	\$143,582	\$0	\$10,000
Oliver, Jacqueline	Member Services Manager	\$142,452	\$0	\$8,000

Marshall, Tiffany	Senior Budget Analyst	\$141,763	\$0	\$7,000
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(b) For fiscal year 2026 (as of January 31), please list in descending order each employee whose salary is or was \$140,000 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.

FY2026				
Name	Title	Salary	Overtime	Bonus
Balestrieri, Gianpiero	Executive Director	\$307,230	\$0	\$0
Hernandez, Daniel	Pension Administrator	\$249,605	\$0	\$0
Sahm, Patrick	Chief Investment Officer	\$249,605	\$0	\$0
Robinson, Kate	Interim General Counsel	\$236,529	\$0	\$0
West, Leslie	Chief Financial Officer	\$236,391	\$0	\$0
Gormley, Paul	Director Internal Audit	\$230,760	\$0	\$0
Morgan, Lori	Deputy Chief Financial Officer	\$230,760	\$0	\$0
Murthy, Ram	Director of Information Technology	\$225,855	\$0	\$0
Canlas, Jamia	Portfolio Manager	\$215,378	\$0	\$0
Tolani, Deepak	Portfolio Manager	\$215,378	\$0	\$0
Edwards, Jaininne	Deputy Chief Benefits Officer	\$214,805	\$0	\$0
Valentine, Lawrence Vernon	Director of Human Resources	\$209,546	\$0	\$0
Smith, Lauren	Communications & Public Relations Director	\$200,197	\$0	\$0
Mobley, David	Financial Manager	\$174,175	\$0	\$0
Ashford, Pamela	Retirement Services Manager	\$170,966	\$0	\$0
Burnett, Michaela	Senior IT Specialist Application & Data Services	\$169,638	\$0	\$0
Thomas, Jacqueline	Manager, Quality Compliance & Projects	\$166,796	\$0	\$0
Andrade, Diego	Senior IT Specialist Systems & Network Services	\$151,496	\$0	\$0
Harley, Jacques	Senior Budget Analyst	\$150,304	\$0	\$0
O'Neal, Rhonda	Senior Accountant	\$150,304	\$0	\$0
Reaves, Deborah	Business Operations Manager	\$150,304	\$0	\$0
Tamboli, Nurulhasan	IT Specialist (Power Platform Developer)	\$150,304	\$0	\$0
Carson, Rabinai	HR Compliance Specialist	\$149,189	\$0	\$0
Shafie, Farahnaz	Information Systems Security Officer	\$147,172	\$0	\$0
Oliver, Jacqueline	Member Services Manager	\$146,013	\$0	\$0
Marshall, Tiffany	Senior Budget Analyst	\$145,307	\$0	\$0
Stradford, Anthony	Customer Care Liaison	\$141,834	\$0	\$0

Jackson Sr., Mark	IT Specialist Systems & Network Services	\$140,505	\$0	\$0
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6. Please list, in descending order, the top 15 overtime earners in your agency for fiscal year 2025. For each, state the employee's name, position or title, salary, aggregate overtime pay; and employee bonus, if any.

Name	Position Title	Salary	FY2025 Aggregate OT Pay
Lewis, Cornell	Records Management Specialist	\$ 70,683	\$ 6,148.50
Carroll-Adams, Tamika	Member Services Representative	\$ 63,345	\$ 5,158.29
Morgan, Dennis	Records Management Specialist	\$ 70,683	\$ 3,715.66
Carver, Sean	Records Management Specialist	\$ 78,295	\$ 3,315.00
Murphy, Shaun	Retirement Analyst	\$ 78,126	\$ 3,028.43
LaPrade, India	Retirement Analyst	\$ 80,470	\$ 2,509.96
Jones, Stacee	Retirement Specialist	\$ 76,542	\$ 2,360.30
Hurt, Vanessa	Lead Member Services Representative	\$ 74,958	\$ 1,627.40
Maynard, Paul	Retirement Analyst	\$ 85,675	\$ 1,528.04
Meagher, Dylan	Benefits Administration Analyst	\$ 89,999	\$ 1,508.45
Perez-Mendez, Max	Retirement Specialist	\$ 76,542	\$ 984.60
Goodine, Reia	Member Services Representative	\$ 63,345	\$ 982.15
Walker, Shaiasia	Retirement Specialist	\$ 74,958	\$ 972.57
Williams, Vincent	Records Management Specialist	\$ 66,625	\$ 966.21
Boles, N'Hlauni	Member Services Representative	\$ 63,345	\$ 799.43

7. (a) For fiscal years 2025 and 2026 (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.

Employee Name	Bonus	Employee Name	Bonus	Employee Name	Bonus
Ashford, Pamela	\$8,000	Bridgers, Nina	\$3,000	Greene, Joyce	\$5,000
Edwards, Jaininne	\$10,000	Dorsey, Saida	\$2,000	Oyundelger, Bolor	\$10,000
Fung, Jenny	\$5,000	McSears, Denice	\$3,000	Tolani, Deepak	\$15,000
Marshmon, Giovanni	\$8,000	Harley, Jacques	\$9,000	Andrade, Diego	\$9,000
Meagher, Dylan	\$5,000	Marshall, Tiffany	\$7,000	Burnett, Michaela	\$10,000
Oliver, Jacqueline	\$8,000	Mobley, David	\$8,000	Gebremeskel, Wukyanos	\$2,000

Thomas, Jacqueline	\$10,000	Morgan, Lori	\$15,000	Jackson, Mark	\$4,000
Gormley, Paul	\$10,000	Morgan, Ricardo	\$7,500	Meredith, Matthew	\$8,000
Harris, Johniece	\$7,000	O'Neal, Rhonda	\$8,500	Romero, Anthony	\$8,000
Hernandez, Daniel	\$14,000	Puscas, Ovidiu	\$10,500	Shafie, Farahnaz	\$10,000
Murthy, Ram	\$14,000	Rivers, Bonnie	\$8,000	Tamboli, Nurulhasan	\$8,000
Robinson, Kate	\$10,000	Sanjines, Daniela	\$4,000	van der Bunt, Samantha	\$7,000
Sahm, Patrick	\$22,000	Walton, Zequilla	\$8,000		
Smith, Lauren	\$10,000	Carson, Rabinai	\$10,000		
Valentine, Vernon	\$12,000	Boone, Nathaniel	\$9,000		
West, Leslie	\$15,000	Canlas, Jamia	\$15,000		

(b) Do any employees receive an administrative allowance? Deferred compensation (excluding the District's 457(b) Plan)?

**There are no DCRB employees that receive administrative allowance or deferred compensation.**

8. For fiscal years 2025 and 2026 (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.

**DCRB did not make any separation payments during this period.**

9. For fiscal years 2025 and 2026 (as of January 31), please state the total number of employees receiving worker's compensation payments.

**DCRB did not have any employees receiving workers' compensation payments during this period.**

10. Please provide the name of each employee who was or is on administrative leave in fiscal years 2025 and 2026 (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 February 21, 2026).

**DCRB did not have any employees on administrative leave in fiscal years 2025 or 2026 (as of January 31).**

11. For fiscal years 2025 and 2026 (as of January 31), please list, in chronological order, all intra-District transfers (or wire transfers) to or from the agency. Give the date, amount, and reason for the transfer.

The list below details the wire transfers between DCRB and District agencies.

<b>FY 2025</b>					
<b>Agency</b>	<b>Date</b>	<b>Reason</b>	<b>Amount</b>	<b>Paid/ Received</b>	
DC Office of the Finance and Resource Management	3/31/2025	AT&T citywide Telecom services in Oct 2024 - Dec 2024 (First Quarter)	\$4,914.45	Paid	
DC Office of the Chief Technology Officer	4/29/2025	IT Assessment	\$580,329.46	Paid	
DC Office of the Chief Technology Officer	4/29/2025	DC Net	\$90,681.12	Paid	
DC Department of Human Resources	5/1/2025	HR Support Services	\$54,834.00	Paid	
DC Office of the Chief Technology Officer	5/15/2025	Data Retention & Oracle Databases	\$25,344.00	Paid	
Metropolitan Police Department (MPD)	9/30/2025	Payments for Actuarial services	\$45.44	Paid	

<b>FY 2026 (as of January 31)</b>					
<b>Agency</b>	<b>Date</b>	<b>Reason</b>	<b>Amount</b>	<b>Paid/ Received</b>	
DC Office of the Chief Technology Officer	10/20/2025	DC Net	\$90,681.12	Paid	
DC Department of Human Resources	10/27/2025	HR Support Services	\$59,338.00	Paid	
DC Office of the Chief Technology Officer	11/17/2025	IT Assessment	\$429,208.19	Paid	
DC Office of the Finance and Resource Management	11/24/2025	AT&T citywide Telecom services in Jan 2025 - Sep 2025 (Second-Fourth Quarter)	\$13,262.42	Paid	

12. Please list, in chronological order, every reprogramming of funds into or out of the agency for fiscal years 2025 and 2026 (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.

**DCRB did not have reprogramming of funds into or out of the agency for fiscal year 2025 or 2026.**

13. Please list, in chronological order, every reprogramming within your agency during fiscal year 2026 to date. Also, include both known and anticipated intraagency reprogrammings. For each, give the date, amount, and rationale.

**There are no reprogrammings within DCRB in FY2026 to date.**

14. For fiscal years 2025 and 2026 (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 generate 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.

**In the fiscal years 2025 and 2026, DCRB did not maintain any special purpose revenue funds.**

15. Please provide a table showing your agency's Council-approved original budget, revised budget (after reprogrammings, etc.) for fiscal years 2024, 2025, and the first quarter of 2026. In addition, please explain the variances between fiscal year appropriations and actual expenditures for fiscal years 2024 and 2025.

Dept/Program Activity		Fiscal Year 2024				Fiscal Year 2025				Actual Expenditures (thru Dec. 31, 2025)	
		Revised Budget		Actual Expenditures		Revised Budget		Actual Expenditures			
		FY 2024	FY 2024	FY 2024	FY 2024	FY 2025	FY 2025	FY 2025	FY 2025	FY 2026	FY 2026
3001	EXECUTIVE	2,971	2,971	1,834	1,137	2,713	2,713	1,729	984	2,966	216
3002	INVESTMENTS	4,318	4,318	2,641	1,677	3,563	3,563	2,897	666	4,119	448
3003	TRUSTEES	557	557	227	330	525	525	229	296	486	25
3004	LEGAL & COMPLIANCE	3,513	3,513	1,733	1,780	5,407	5,407	1,776	3,631	5,303	271
3005	BENEFITS	6,969	6,969	4,730	2,239	7,173	7,173	5,535	1,638	7,161	994
3006	OPERATIONS / FINANCE	8,720	8,720	5,704	3,016	8,174	8,174	5,835	2,339	7,619	1,134
3007	INFORMATION TECHNOLOGY	12,643	12,643	5,475	7,168	12,632	12,632	5,938	6,694	12,086	927
TOTAL		39,691	39,691	22,344	17,347	40,187	40,187	23,939	16,248	39,740	4,015

**FY2024:** DCRB had a surplus in PS of \$4.5M due to vacancies and reductions in benefits and bonus pay. DCRB had a surplus in NPS of \$12.8M. This surplus included \$7.0M in Contractual Services for uncommitted spending on new systems and STAR reimbursement of \$5.7M and \$1.3M for projects that were either not initiated or initiated at year-end and will continue in FY25. The NPS surplus also included \$1M in Legal Services due to a decrease in need for legal consultants as well as \$1.2M in Professional Fees due to reduced costs of MOUs and projects that were not fulfilled or will be utilized in FY25. Investments had a surplus of \$1M in custodial and consultant fees because of decreased consultant services. There is a surplus of \$2.0M in Other Services and Charges due to a decreased need for travel, supplies, training, etc. Lastly, the surplus of \$600k in equipment and rental is due to planned reconfiguration of office space that will now be initiated in future years.

**FY2025:** DCRB had a surplus in PS of \$4.1M due to vacancies and reductions in benefits and bonus pay. DCRB had a surplus in NPS of \$12.2M. This surplus included \$7.0M in Contractual Services for uncommitted spending on new systems and STAR reimbursement of \$5.9M and \$1.1M in projects that were either not initiated or initiated at year-end and will continue in FY26. There are two new system projects that were initiated at year-end and will be continued to FY26 for approx. \$8M. The NPS surplus also included \$2M in Legal Services due to a decrease in need for outside legal consultants as well as \$1M in Professional Fees due to reduced costs of MOUs and projects that were not fulfilled or will be utilized in FY25. There is a surplus of \$1.8M in Other Services and Charges due to decreased need for travel, supplies, training, etc. Lastly, the surplus of \$400k in equipment and rental is due to decreased need to purchase furniture, equipment or IT software.

16. Please list all memoranda of understanding (MOU) either entered into by your agency or in effect during fiscal years 2025 and 2026 (as of January 31). For each, describe its purpose, indicate the date entered, and provide the actual or anticipated termination date.

<b>FY2025</b>		<b>Purpose</b>	<b>Start Date</b>	<b>End Date</b>
<b>Agency</b>				
Office of the Chief Technology Office (OCTO)	To provide services for data storage and oracle database		10/1/2024	9/30/2025
DC Department of Human Resources (DCHR)	Staffing support across a range of HR areas (recruiting, retirement, training and benefits)		10/1/2024	9/30/2025
Office of the Chief Technology Office (OCTO)	To provide Interagency annual information technology services		10/1/2024	9/30/2025
Metropolitan Police Department (MPD)	Payments for actuarial services		10/1/2024	9/30/2025
DC Office of the Finance and Resource Management (OFRM)	Telecom Services (Citywide)		10/1/2024	9/30/2025
Office of the Chief Technology Office (OCTO)	Maintain telephone services		10/1/2024	9/30/2025
<b>FY2026 (as of January 31)</b>				
<b>Agency</b>		<b>Purpose</b>	<b>Start Date</b>	<b>End Date</b>
Office of the Chief Technology Office (OCTO)	To provide Interagency annual information technology services		10/1/2025	9/30/2026
Office of the Chief Technology Office (OCTO)	Maintain telephone services		10/1/2025	9/30/2026
DC Department of Human Resources (DCHR)	Staffing support across a range of HR areas (recruiting, retirement, training and benefits)		10/1/2025	9/30/2026
DC Office of the Finance and Resource Management (OFRM)	Telecom Services (Citywide)		10/1/2025	9/30/2026

17. 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 the fiscal years 2025 and 2026.

**DCRB did not submit budget enhancements for fiscal years 2025 or 2026.**

18. 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.

**DCRB has no open capital projects.**

19. Please list all pending lawsuits that name your agency (including the Board) as a party, for that your agency (or the Board) is defending. 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.

**There are three civil actions naming DCRB that do not expose the city to significant liability in terms of money and/or change in practices:**

*Erie Sampson v. District of Columbia Retirement Board, No. 1:24-cv-02601 (D.D.C. 2024).* This civil lawsuit poses no potential significant liability to the city in terms of money or change in practices. DCRB's former general counsel asserted a whistleblower complaint in D.C. Federal court arising out of the Dodd-Frank Act that largely mirrors her dismissed DC Superior complaint. DCRB's motion to dismiss was denied and the matter was referred to discovery on August 25, 2025.

*District of Columbia Retirement Board v. Office of Employee Appeals, No. 2023-CAB-005159 (D.C. Super. Ct. 2023), No. 24-CV-0922 (D.C. Ct. App. 2024).* This civil lawsuit poses no potential significant liability to the city in terms of money or change in practices DCRB challenged the Office of Employee Appeals' ("OEA") decision regarding the termination of DCRB's former general counsel in D.C. Superior Court on jurisdictional grounds and on the merits of the decision. D.C. Superior Court remanded for factfinding on OEA's jurisdiction. DCRB appealed the remand to the D.C. Court of Appeals because jurisdiction can be decided as a matter of law. The appeal has been fully briefed and argued and is pending a decision.

*Ricardo Clark, et al. v. District of Columbia, et al, No. 2025-CAB-002982 (D.C. Super. Ct. 2025).* The claim against DCRB poses no potential significant liability to the city in terms of money or change in practices. DCRB is named in a complaint by a group of FEMS employees who previously asserted identical claims against the District and DCRB in *Clark v. District of Columbia, et. al.*, 1:23-cv-01564-RDM ("Clark I"). Plaintiffs allege fiduciary breach based on DCRB's failure to lobby the District Government for more favorable legislation on behalf of all EMTs who transferred to FEMS under the *Paramedic and Emergency Medical Technician Lateral Transfer to Firefighting Amendment Act of 2001* (DC Code § 5-409.01). Plaintiffs' complaint has been fully briefed and is pending a decision by the DC Superior Court.

20. (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 2025 or 2026 (as of January 31).

Name:	Purpose:	Completed:
Actuarial Variations as of October 1, 2025, for Fiscal Year 2026 Employer Contribution	To fulfill the requirements of D.C. Code § 1-907.02(a) and (c), 1-907.03(a) and 1.907.04.	12/2025
Audited Financial Statements for FY 2025	To express an opinion on the FY 2025 financial statements and to obtain reasonable assurance on whether the financial statements are free of material misstatements	12/2025

(b) Please list and describe any ongoing investigations, audits, or reports of your agency or any employee of your agency.

**None.**

21. How many grievances have been filed by employees or labor unions against agency management? Please list each of them by year for fiscal years 2024, 2025, and 2026 (as of January 31). Give a brief description of each grievance, and the outcome as of January 31, 2026. Include on the chronological list any earlier grievance that is still pending in any judicial forum.

**None.**

22. (a) Please describe the agency's procedures for investigating allegations of sexual harassment committed by or against its employees.

**DCRB adheres to the process for investigating allegations of sexual harassment in Mayor's Order 2023-131. Generally, employees are to report allegations of sexual harassment to a supervisor, DCRB/HR, or DCRB's designated Sexual Harassment Officer. Employees also have the right to report allegations of sexual harassment directly to the DC Office of Human Rights. Upon receiving an allegation, DCRB/HR (or the Sexual Harassment Officer) will listen confidentially to the facts of the allegation. If warranted, confidential interviews may be conducted with the involved parties, with findings presented to senior management, to achieve an appropriate resolution and agency response.**

(b) If different, please describe the agency's procedures for investigating allegations of misconduct.

**Allegations of misconduct are directed to DCRB/HR. Upon receiving an allegation, DCRB/HR (or appropriate parties) will listen confidentially to the facts of the allegation. If warranted, confidential interviews may be conducted with the parties**

**involved, with findings presented to senior management, to achieve an appropriate resolution and agency response.**

(c) List chronologically and describe each allegation of sexual harassment and misconduct received by the agency in FY 2025 and FY 2026 (as of January 31) and the resolution of each as of the date of your answer.

**None.**

23. In table format, please list the following for fiscal years 2025 and 2026 (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 *and* per day); and (3) total spent (by person and for the agency).

<u>Employee/Title</u>	<u>Fiscal Year Expense</u>	
	<u>2025</u>	<u>2026 (thru January 31)</u>
<b>Procurement Card</b>		
Nina Bridgers/Administrative Specialist	9,044	3,280
Rabinai Carson/HR Compliance Specialist	3,432	884
Shaqua Clark/Executive Assistant	13,831	7,996
Wukyanos Gebremeskel/IT Specialist	15,061	2,197
Joyce Greene/Investments Office Administrator	15,486	67
Johniece Harris/Ex. Administrator/Board Liaison	6,015	127
Denice McSears/Operations Administrator	31,745	2,626
Bonnie Rivers/Financial Specialist	13,054	1,836
<b>Procurement Card Total</b>	<u>\$ 107,668</u>	<u>\$ 19,014</u>
<b>Travel Card</b>		
Nina Bridgers/Administrative Specialist	4,575	-
Shaqua Clark/Executive Assistant	3,064	696
Joyce Greene/Investments Office Administrator	14,211	5,035
Johniece Harris/Ex. Administrator/Board Liaison	2,682	2,683
Bonnie Rivers/Financial Assistant	1,640	-
<b>Travel Card Total</b>	<u>\$ 26,171</u>	<u>\$ 8,414</u>
<b>Grand Total</b>	<u><b>\$ 133,840</b></u>	<u><b>\$ 27,428</b></u>

24. Please provide a list of all procurements for goods or services for use by your agency over \$25,000 for fiscal years 2025 and 2026 (as of January 31). 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.

## FY2025

Vendor Name	Description	Contract \$ Amount
Abel Noser Solutions LLC	Investment Consulting Services	38,000.03
Advent Software Inc.	Portfolio Management Services	34,419.66
Bolton Partners, Inc.	Actuarial Services	87,217.03
Capitol Document Solutions	Photocopier supplies, office supplies & services	40,704.33
CDW LLC dba CDW Government LLC, CDW Government	IT Software Maintenance	36,608.46
CEM Benchmarking Inc.	Investment Consulting Services	45,000.00
Colmore, Inc.	Investment Fee Validation	182,000.00
Crowe LLP	Accounting Services	306,750.00
Diligent Corporation	Software licenses, Maintenance & Support	64,790.00
Election-America, Inc.	Voting Software Management System	29,954.71
Evestment Alliance, LLC	Investment Consulting Services	28,633.68
Groom Law Group, Chartered	Legal Professional Services	51,105.00
Meketa Investment Group, Inc.	Investment Consulting Services	873,000.00
Metropolitan Life Insurance Company	STD/LTD insurance agreement	64,238.26
Morgan, Lewis & Bockius, LLP	Legal Professional Services	349,072.00
Preqin Limited	Software licenses, Maintenance & Support	52,283.00
RSM US LLP	IT Software Maintenance	37,250.81
The Seaprompt Corporation	IT Software Maintenance	61,812.80
Washington Metro Transit Authority	Local transit for employee benefits	63,655.65
Wilmer Cutler Pickering Hale and Dorr LLP dba WilmerHale	Legal Professional Services	29,868.87

## FY2026

Vendor Name	Description	Contract \$ Amount
Abel Noser Solutions LLC	Investment Consulting Services	\$79,999.97
Advent Software Inc.	Portfolio Management Services	\$65,557.08
Bolton Partners, Inc.	Actuarial Services	\$224,062.77
Capitol Document Solutions	Photocopier supplies, office supplies & services	\$41,385.12
CDW LLC dba CDW Government LLC, CDW Government	IT Software Maintenance	\$73,826.66
CEM Benchmarking Inc.	Investment Consulting Services	\$46,000.00
Colmore, Inc.	Investment Fee Validation	\$235,375.00
Crowe LLP	Accounting Services	\$922,842.00
Data Integrators, Inc	Printing Services	\$37,040.00
Diligent Corporation	Software licenses, Maintenance & Support	\$68,029.71
Election-America, Inc.	Voting Software Management System	\$27,195.36
Evestment Alliance, LLC	Investment Consulting Services	\$27,523.04
Groom Law Group, Chartered	Legal Professional Services	\$100,000.00
Infojini, Inc.	Temporary Staffing Services	\$99,999.00
Iron Mountain	Document Management/Removal Services	\$45,000.00
Meketa Investment Group, Inc.	Investment Consulting Services	\$900,000.00
Metropolitan Life Insurance Company	STD/LTD insurance agreement	\$72,079.62
Midtown Personnel, Inc. dba The Midtown Group	Temporary Staffing Services	\$99,999.00
Morgan, Lewis & Bockius, LLP	Legal Professional Services	\$350,000.00
PRM Consulting, Inc	HR Consulting Services	\$83,100.00
RSM US LLP	IT Software Maintenance	\$175,132.50
Staples, Inc.	Office Supplies	\$23,000.00
Washington Metro Transit Authority	Local transit for employee benefits	\$151,128.00
West Publishing Corporation	Legal Professional Services	\$29,944.20
Wilmer Cutler Pickering Hale and Dorr LLP dba WilmerHale	Legal Professional Services	\$100,000.00

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

**DCRB manages its data costs of issued cellular phones and mobile devices by engaging in enterprise contracts with carriers offering data plans with discounted government pricing negotiated by the District. DCRB also leverages the OCTO data plan offered by the carrier with discounted government pricing for issued cellular phones and iPads.**

(b) In table format (same format as last year's answer to this question), please provide the following information for fiscal years 2025 and 2026 (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.

FY 2025 (As of 9/30/2025)				FY 2026 (as of 01/31/2026)			
Name	Total Number of Filled FTEs	Number of Mobile Devices	\$ Amount	Total Number of Filled FTEs	Number of Mobile Devices	\$ Amount	Justification
Trustees	0	10	4,590	0	10	906	Board communication
Benefits	37	1	404	35	1	93	Improve productivity
Executive	8	4	3,040	8	4	797	
Finance	12	3	1,577	12	3	512	
HR	3	1	555	3	1	176	
Investment	7	2	1,277	7	2	352	
IT	9	7	4,789	9	7	1,419	
Legal	3	3	1,762	2	2	529	

26. (a) Does your agency have or use one or more government vehicles? If so, for fiscal years 2025 and 2026 (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.; and (6) what employee discipline resulted, if any.

**None.**

(b) Please list all vehicle accidents involving your agency's vehicles for fiscal years 2023, 2025, and 2026 (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; and (5) whether there was a finding of fault and, if so, who was determined to be at fault.

**None.**

27. Please list every lawsuit against the agency that was settled or decided by a trial court in FY 2025 and FY 2026 to date. Briefly describe each and the sanction, if any.

**None settled or decided by a trial court. However, the DC Court of Appeals affirmed the Superior Court's dismissal of a whistleblower complaint filed by DCRB's former general counsel in July 2025.**

28. 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 in fiscal year 2022, 2024, 2025 (as of January 31) for a settlement or judgment pursuant to D.C. Code § 2-402.

**None.**

29. (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?

**Yes.**

(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 chauffeur or take-home status.

**None.**

30. In table format, please provide the following information for fiscal years 2025 and 2026 (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). Note: Please provide this information in a style more readable than last year's answer.

FY 2025			
Employee Name	Title	\$ Amount	Justification
Ashford	Pamela	\$2,206	NCPERS 2025 Public Pension HR Summit
Boone	Nathaniel	\$1,938	Manager AGMs meeting
Boone	Nathaniel	\$3,479	ILPA Operations Due Diligence training
Boone	Nathaniel	\$1,669	Rockwood AGM, SVP Due Diligence meeting
Boone	Nathaniel	\$848	Wheelock Street Capital annual meeting
Boone	Nathaniel	\$429	Paine Schwartz Annual General meeting
Boone	Nathaniel	\$1,494	Black Rock Global Infrastructure Fund annual meeting
Burnett	Michaela	\$3,217	2025 Prism Annual conference
Canlas	Jamia	\$2,608	Tiger AGM/LPAC/SilverPoint meetings
Canlas	Jamia	\$1,941	SuperReturn conference and LPAC/AGM meetings
Canlas	Jamia	\$3,559	Chequers AGM/LPAC meeting. Due Diligence w/Tikehau, LaTour, Monteflore and Five Arrows
Canlas	Jamia	\$490	Climate Adaptive Infrastructure (CAI) LPAC and Annual General meeting
Canlas	Jamia	\$865	Bernhard Capital Partners 2025 Annual General meeting
Edwards	Janine	\$1,999	NCPERS 2025 Public Pension HR Summit
Guzman	Mariana	\$972	Due Diligence on Ridgemont Partners and meet w/two prospective managers
Guzman	Mariana	\$4,581	ILPA Private Equity Co-Investing for LP training course
Guzman	Mariana	\$813	Bernhard Capital Partners 2025 Annual General Meeting
Guzman	Mariana	\$334	2025 Ara Partners Annual General meeting
Marshall	Tiffany	\$2,889	GFOA Advanced Budget Academy
Marshall	Tiffany	\$1,316	GFOA Developing Personnel Budget
Marshmon	Giovanni	\$1,666	NCPERS 2025 Public Pension HR Summit
Oyundelger	Bolor	\$1,480	IFM Investors 2024 Annual General meeting
Oyundelger	Bolor	\$4,738	ILPA Operational Due Diligence training
Oyundelger	Bolor	\$334	Ara Partners 2025 Annual General meeting
Sahm	Patrick	\$2,958	Epiris 2024 Annual Investor meeting
Sahm	Patrick	\$338	Clearhaven Partners 2024 Annual Funds I & II General meeting
Sahm	Patrick	\$212	Sentinel Capital Partners 2025 Investor conference
Sahm	Patrick	\$942	Cambridge Associates Private Markets
Sahm	Patrick	\$1,420	iSquared Capital AGM
Sahm	Patrick	\$1,009	Due Diligence on Ridgemont Partners and meet w/two prospective managers
Sahm	Patrick	\$3,145	Due Diligence on Orion, Aermont, Capvest, Mondrian, Veld, Aermont and attend Epiris AGM
Tolani	Deepak	\$1,523	LPAC meeting (Turning Rock and Centerbridge)
Tolani	Deepak	\$1,167	AGM/LPAC meeting (Bernhard Capital Partners)
Tolani	Deepak	\$423	Ridgemont AGM
Tolani	Deepak	\$291	Centerbridge AGM LPAC meetings
Tolani	Deepak	\$2,631	Capital Allocators SDM Summit and Accel-KKR meeting
Van Der Bunt	Samantha	\$3,423	National Association of Public Pension Attorneys (NAPPA) 2025 Legal Education conference
Walton	Zequilla	\$1,849	GFOA Intermediate Governmental Accounting

FY 2026 (as of January 31, 2026)				
Employee Name		Title	\$ Amount	Justification
Boone	Nathaniel	Lead Investment Analyst	\$1,648	Tiger AGM, LPAC and Due Diligence on Raith Capital Partners
Canlas	Jamila	Portfolio Manager	\$317	Due Diligence on Fortress Lending Fund AGM and LPAC meetings
Canlas	Jamila	Portfolio Manager	\$2,392	Due Diligence on Altaris Capital and Ares Management AGM
Guzman	Mairana	Investment Analyst	\$963	Due Diligence on Ara Partners AGM
Oyundelger	Bolor	Senior Investment Analyst	\$2,025	Due Diligence on Raith Capital Partners Fund IV
Sahm	Patrick	Chief Investment Officer	\$2,079	Due Diligence on Orion, Aermont, Capvest, Mondrian, Veld, Aermont and attend Epiris AGM
Sahm	Patrick	Chief Investment Officer	\$997	Due Diligence on Clearhaven Partners AGM
Tolani	Deepak	Portfolio Manager	\$171	Due Diligence on Centerbridge LPAC and Turning Rock AGM
Tolani	Deepak	Portfolio Manager	\$546	Due Diligence on Elion AGM and Hillpointe visit

31. Please provide and itemize, as of January 31, 2026, 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.

**As of January 31, 2026, there are no WAE, term or contract personnel within DCRB.**

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

**In collaboration with the Office of the Chief Technology Officer (OCTO), DCRB again provided active police officers, firefighters and teachers with their annual Statement of Estimated Benefits leveraging the PeopleSoft self-service online Portal. DCRB worked with its independent actuary and HR departments to improve data quality so that the statements could be more accurate and useful for the members. The statements included the benefit estimates for both a monthly retirement benefit and a deferred retirement benefit. The annual statements provide plan participants with an estimate of the total value of their benefit over a 25-year period. To further increase transparency to the members, DCRB continues to revise its public website so that members can more easily locate information of relevance to them. Finally, in the past year, the Benefits department published six instructional videos for members including:**

- **Self-Service Instructional Video**
- **Healthcare Federal Enrollment Form Instructional Video**
- **District of Columbia Teachers' Retirement Plan Overview Video**
- **District of Columbia Teachers' Retirement Plan - Life Events Overview Video**
- **District of Columbia Police and Firefighters' Retirement Plan Overview Video**

- **Understanding the New W-4P Form**

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

**The DCRB Benefits Department continues to work with agencies and stakeholders in communicating with plan participants, beneficiaries, and other parties. DCRB schedules periodic meetings with retirement associations, HR departments, and other stakeholders involved in the benefits administration process to discuss additional ways to improve internal processes and the member experience. This year, we will continue our member collaboration efforts with MPD, FEMS, and DCPS in offering joint retirement sessions throughout the year. Last year, DCRB conducted over 10 sessions, along with additional outreach to retirement associations.**

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

**None.**

35. Please identify any statutory or regulatory impediments to your agency's operations.

**None.**

36. Please provide, for each fiscal year 2023, 2024, 2025, and 2026 (as of January 31), Board member stipend payments for each member. What is the current cap? Is the cap calculated on a fiscal year or calendar year basis?

**The current cap for board members is \$15,000 and the current cap for the Chairman is \$25,000. The cap is calculated on a fiscal year basis.**

Trustee Name	FY 2023	FY 2024	FY 2025	FY2026 (thru Jan 31)
Adam Weers	14,969	14,969	14,850	3,722
Christopher Finelli	13,226	14,810	9,900	-
Danny Clarke Gregg	14,969	14,533	11,405	5,386
Geoffrey P. Grambo	8,320	9,013	7,643	1,426
Greggory Pemberton	14,652	14,573	14,969	2,218
Joseph Bress	11,246	16,790	20,418	-
Joseph Clark	14,256	14,850	14,969	4,514
Lyle Blanchard	14,161	9,187	12,791	1,980
Mary Collins	14,296	14,969	9,821	-
Nathan Saunders	14,969	14,969	14,969	-
Tracy Harris	14,969	15,000	14,969	-
Chester McPherson	-	-	-	-
<b>Total</b>	<b>\$ 150,033</b>	<b>\$ 153,663</b>	<b>\$ 146,702</b>	<b>\$ 19,246</b>

37. Did your agency receive any FOIA requests in fiscal year 2025? 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 year 2024, 2025, and 2026 (as of January 31) related to FOIA.

**Yes, DCRB received 17 FOIA requests in FY 2025, and it filed an Annual FOIA Report for FY 2025 (see Attachment #3). DCRB does not track the costs incurred in responding to FOIA requests, but it estimates that staff has devoted approximately 145 hours of time between FY 2023, 2024, and 2025 (40 hours per year in 2024 and 2025, and 65 hours in 2023) responding to FOIA requests.**

38. 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 2024, 2025 and 2026 (as of January 31).

Fiscal Year	Adjusted Expendable Budget	Annual CBE Spend	% of CBE Spending relative to Adjusted Expendable Budget	What is the CBE spending goal for your agency per the DSLBD SBE Opportunities Guide (Green book)?	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?
<b>FY 2024</b>	\$ 131,976	\$ 66,703	50.5%	\$ 65,988	0	N/A
<b>FY 2025</b>	\$ 7,226,957	\$ 34,691	0.5%	\$ 3,613,479	0	N/A
<b>FY 2026 (as of January 31, 2026)</b>	\$ 7,216,029	\$ 63,025	0.9%	\$ 3,608,015	0	N/A

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

**DCRB, as an independent agency, does not submit an annual performance plan to the Office of the City Administrator.**

40. (a) Does DCRB have key performance indicators, or metrics, to gauge performance? If not, why not? If DCRB has KPIs, 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) 2024, 2025, and 2026 (through the first quarter).

**DCRB, as an independent agency, does not submit KPIs to the Office of the City Administrator.**

(b) What KPIs have been dropped (or changed) since 2022? List each specifically and explain why it was dropped or changed.

**N/A**

41. (a) Each year DCRB undergoes an independent compensation financial audit. For each fiscal year 2024 to the present, list verbatim each of the material weaknesses or significant deficiencies found by the auditor.

**In FY25, DCRB engaged PRM Consulting firm to execute a comprehensive Classification and Compensation study of DCRB's current compensation program. As an independent government agency with its own pay structure, DCRB periodically assesses its compensation program, to ensure alignment with and continuing competitiveness within the job market. The study began with soliciting input from DCRB's pre-identified, organizational peer groups. Final study results are anticipated at or near the conclusion of calendar Q1 2026.**

(b) Since the deficiencies and reports, what is being done, definitively, to resolve and eliminate these finds this year?

42. Please provide a copy of any forensic audit report(s) conducted by DCRB since 2024.

**None.**

43. What are your top five priorities for the agency? Please provide a detailed explanation for how the agency expects to achieve or work toward these priorities in fiscal years 2025 and 2026.

**DCRB's top five goals involve continuing to improve Benefits Administration processing and services to its members:**

**(1) DCRB is constantly improving benefits administration capabilities to ensure that benefits are paid to our members accurately and timely. DCRB continues to collaborate with our partner agencies, namely MPD, FEMS and DCPS to increase the services to our members. DCRB will continue to work with DC agencies to improve employee data quality, educate employees about the retirement process, and utilize technology to improve the retirement process. DCRB will also continue the goal of educating its members on subject matters that focus on topical areas common to member events such as completing forms, reporting deaths, refunds/deferred annuity; and power of attorney and other common themes associated with members**

needing to come into DCRB (appointments) or call DCRB Member Services Center. This year's goal is to produce at least one brochure/video/web site content per quarter.

- (2) As mentioned earlier in this testimony, DCRB will continue to provide active participants with annual estimated benefit statements that will serve as a tool to assist police officers, firefighters, and teachers with planning for their retirement. We will continue to leverage the PeopleSoft self-service portal as a vehicle to distribute information to members. DCRB is working with the active HR departments to further improve data quality which will make the statements more accurate for retirement planning purposes.
- (3) DCRB will continue to improve the member services experience by continuing to train staff on common questions, continue to provide necessary materials/access to information so staff can assist callers and members can experience lower wait times (less than 5mins), low abandonment rates, and respond to member inquiries within 24 hours. Our goal metrics include:
  - 90% Member Satisfaction Survey Rates Good or Excellent
  - Average hold time <5 mins
  - 90% of member inquires answered within 24 hours
- (4) The DCRB Benefits and IT departments will begin year one (1) in working together to begin implementing a BAPS system to replace the current Treasury benefits administration and payroll systems. This will include working with agency stakeholders, US Treasury, and internal DCRB departments to plan for the transition to BAPS within 2 years.
- (5) In collaboration with the DCRB IT Team, the Finance team will be launching a new Enterprise Resource Planning (ERP) system. Microsoft Dynamics 365 was selected in 2025 for this project, with Crowe LLP assisting in its implementation. This system aims to improve our finance, procurement, and budgeting functions by integrating various financial processes, streamlining procurement operations, and offering advanced budgeting tools. The ERP system will provide real-time data access, support better decision-making, and foster a more collaborative working environment. We expect it to significantly reduce manual tasks, resulting in cost savings and optimized resource allocation. Our project team is carefully planning the deployment, scheduled for April 1st, 2026, to ensure a smooth transition with minimal disruption to daily operations.

44. Why is the remaining amortization period 30 years for the Police and Firefighters Fund, but 20 years for the Teachers Retirement Fund?

Under the funding policy, when a plan has a funded ratio of more than 100%, then that surplus (or negative unfunded liability) is amortized over an "open" 30-year period. This was adopted to keep the contribution from being pushed too far down when the plan is in that position.

By contrast when a plan is not yet fully funded (i.e. the funded ratio is under 100%) we are funding under a closed amortization so that we are targeting getting to 100% funded in a set time. Currently the Police and Firefighters fund is over 100% funded, while the Teachers are just under 100% funded.

45. In both dollars and percentage of total investments, how many dollars are invested by DCRB in fossil fuel companies?

	December 31, 2025				
	Total Energy Exposure (\$)		% of AUM	CU200 Exposure (\$)	
	Total Energy Exposure (\$)	% of AUM		% of AUM	
Direct	4,425,530	0.03%		4,425,530	0.03%
Indirect	294,476,063	2.13%		207,262,633	1.50%
	298,901,593	2.16%		211,688,163	1.53%
Alternative Energy Exposure	20,647,663	0.1%			
Total Fund AUM	13,810,319,049				

- **Total Energy sector exposure amounts to 2.2% of total assets under management, or about \$299mn.**
- **Total Carbon Underground 200 (CU 200) company exposure amounts to 1.5% of total assets, or \$212mn. This includes 0.03% direct exposure and 1.5% indirect exposure.**
- **Totals may not add up due to rounding**

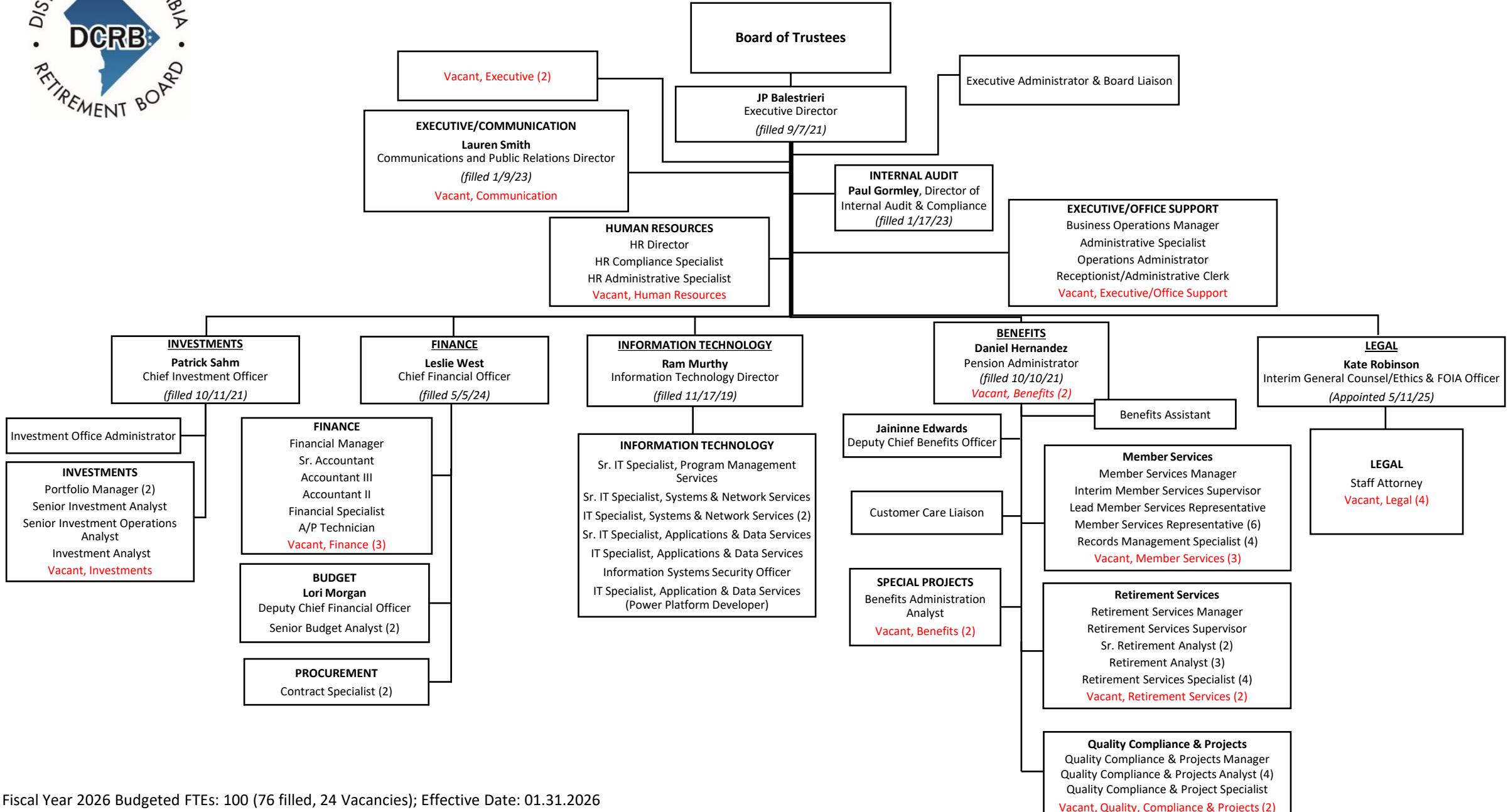
46. Please explain to what extent the DCRB is utilizing, or seeking to increase, professional services (e.g. investment advisors) with women and minorities.

DCRB is required to report on the method and results of DCRB's efforts to utilize "diverse and emerging fund managers," including data by race, gender, and fund size. D.C. Code § 1-909.02(b)(15); *see* D.C. Code § 1-901.02(2B). DCRB's methodology for gathering this information and its results are reported annually in its Annual Comprehensive Financial Report. *See, e.g.*, DCRB FY 2023 ACFR at Exhibit 6, pp. 75-76 (<https://dcrb.dc.gov/publication/dcrb-2023-fiscal-year-annual-comprehensive-financial-report-acfr>). However, DCRB is also bound by its fiduciary obligation to maximize the Funds' returns and minimize risk when selecting fund managers and bases its selections on the best interests of the Funds and its membership as a whole.



# The District of Columbia Retirement Board (DCRB)

ATTACHMENT #1



## Attachment #2

### DCRB Schedule A (as of January 31, 2026)

Program Title	Title	Vacant Status	Salary	Benefits
<b>Executive</b>	Executive Director	F	307,230	76,808
	Business Operations Manager	F	150,304	37,576
	Administrative Specialist	F	78,023	19,506
	Director Internal Audit	F	230,760	57,690
	Receptionist/Admin Clerk	F	55,158	13,790
	Director of Policy & Program	V	205,300	51,325
	Communications & PR Director	F	200,197	50,049
	Operations Administrator	F	72,450	18,113
	Executive Administrator and Bo	F	110,379	27,595
	Advisor Ops & Special Project	V	208,004	52,001
	Administrative Assistant II	V	53,918	13,480
<b>Investments</b>	Communications Specialist	V	81,235	20,309
	Portfolio Manager	F	215,378	53,845
	Chief Investment Officer	F	249,605	62,401
	Portfolio Manager	F	215,378	53,845
	Director Risk and Investment	V	187,633	46,908
	Investment Analyst	F	96,350	24,088
	Investment Office Administrato	F	99,201	24,800
	Senior Investment Analyst	F	130,852	32,713
<b>Legal Services</b>	Senior Investment Ops Anlst	F	130,852	32,713
	General Counsel	V	205,300	51,325
	Executive Assistant	V	71,171	17,793
	Staff Attorney	F	112,750	28,188
	Senior Investment Funds & Comp	V	187,633	46,908
	Sr. Counsel	V	187,633	46,908
<b>Benefits</b>	Interim General Counsel	F	236,529	59,132
	Executive Assistant	F	74,594	18,649
	Lead Member Services Represent	V	71,171	17,793
	Manager Quality Compliance &	F	166,796	41,699
	Member Services Manager	F	146,013	36,503
	Lead Member Services Represent	F	76,832	19,208
	Member Services Representative	F	64,929	16,232
	Pension Administrator	F	249,605	62,401
	Retirement Analyst	F	87,817	21,954
	Retirement Specialist	F	76,832	19,208
	Retirement Specialist	F	78,456	19,614
	Analyst Quality Cpl & Proj	F	111,574	27,894
	Quality Compliance & Projects	V	92,738	23,185
	Records Management Specialist	F	72,450	18,113
	Retirement Specialist	F	78,456	19,614
	Senior Retirement Analyst	F	93,065	23,266

## Attachment #2

### DCRB Schedule A (as of January 31, 2026)

Program Title	Title	Vacant Status	Salary	Benefits
	Member Services Representative	F	64,929	16,232
	Retirement Specialist	F	80,252	20,063
	Analyst QC&P	F	117,533	29,383
	Retirement Services Manager	F	170,966	42,742
	Member Services Representative	F	64,929	16,232
	Records Management Specialist	F	80,252	20,063
	Project Analyst	V	71,171	17,793
	Specialist Quality Compliance	F	114,054	28,514
	Interim Member Services Superv	F	103,525	25,881
	Senior Retirement Analyst	F	114,054	28,514
	Records Management Specialist	F	72,450	18,113
	Member Services Representative	F	64,929	16,232
	Retirement Services Supervisor	F	122,606	30,652
	Member Services Supervisor	V	92,738	23,185
	Deputy Chief Benefits Officer	F	214,805	53,701
	Member Services Representative	V	53,918	13,480
	Retirement Analyst	V	81,235	20,309
	Sr. Project Analyst	V	106,397	26,599
	Retirement Analyst	F	84,408	21,102
	Analyst QC&P	F	109,297	27,324
	Quality Compliance & Projects	F	109,297	27,324
	Records Management Specialist	F	68,291	17,073
	Customer Care Liaison	F	141,834	35,459
	Member Services Representative	V	53,918	13,480
	Member Services Representative	F	64,929	16,232
	Member Services Representative	F	64,929	16,232
	Benefits Administration Analys	F	92,249	23,062
	Retirement Analyst	F	87,817	21,954
	Document Management Supervisor	V	106,397	26,599
	Quality Compliance & Projects	V	106,397	26,599
	DROP Program Manager	V	141,623	35,406
Ops/Finance	Accountant	V	81,235	20,309
	Sr. Accountant	F	150,304	37,576
	Accounts Payable Technician	F	80,898	20,225
	Accountant III	F	121,873	30,468
	Chief Financial Officer	F	236,391	59,098
	Financial Specialist	F	99,907	24,977
	HR Compliance Specialist	F	149,189	37,297
	Chief of Operations	V	169,148	42,287
	Director of Human Services	F	209,546	52,387
	Controller	V	187,633	46,908

**Attachment #2****DCRB Schedule A (as of January 31, 2026)**

Program Title	Title	Vacant Status	Salary	Benefits
	Contract Specialist	F	130,852	32,713
	Sr. Budget Analyst	F	145,307	36,327
	Sr. Budget Analyst	F	150,304	37,576
	Financial Manager	F	174,175	43,544
	Contract Specialist	F	130,852	32,713
	HR Compliance Specialist	V	122,213	30,553
	HR Administrative Specialist	F	84,050	21,013
	Accountant II	F	110,316	27,579
	Deputy Chief Financial Officer	F	230,760	57,690
<b>Info/Tech</b>	IT Specialist Systems & Netwo	F	140,505	35,126
	Senior IT Specialist Systems	F	151,496	37,874
	IT Specialist Systems & Netwo	F	107,002	26,751
	Director of Information Technology	F	225,855	56,464
	Senior IT Specialist Applicat	F	169,638	42,410
	IT Specialist Applications &	F	139,981	34,995
	Info Systems Security Officer	F	147,172	36,793
	Senior IT Specialist Program	F	139,326	34,832
	IT Specialist (Power Platform	F	150,304	37,576

## Agency Name

District of Columbia Retirement Board (DCRB)

## Annual Freedom of Information Act Report for Fiscal Year 2025

October 1, 2024 through September 30, 2025

FOIA Officer Reporting Kate Robinson, Interim General Counsel (DCRB)**PROCESSING OF FOIA REQUESTS**

1. Number of FOIA requests received during reporting period ..... 17
2. Number of FOIA requests pending on October 1, 2024 ..... 1 (closed on 10/28/25)
3. Number of FOIA requests pending on September 30, 2025 ..... 0
4. The average number of days unfilled requests have been pending before each public body as of September 30, 2025 ..... 0

**DISPOSITION OF FOIA REQUESTS**

5. Number of requests granted, in whole ..... 4
6. Number of requests granted, in part, denied, in part ..... 7
7. Number of requests denied, in whole ..... 5
8. Number of requests withdrawn ..... 0
9. Number of requests referred or forwarded to other public bodies ..... 0
10. Other disposition ..... 1

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

11. Exemption 1 - D.C. Official Code § 2-534(a)(1) ..... 9
12. Exemption 2 - D.C. Official Code § 2-534(a)(2) ..... 3
13. Exemption 3 - D.C. Official Code § 2-534(a)(3)
  - Subcategory (A) ..... 0
  - Subcategory (B) ..... 0
  - Subcategory (C) ..... 0
  - Subcategory (D) ..... 0
  - Subcategory (E) ..... 0
  - Subcategory (F) ..... 0
14. Exemption 4 - D.C. Official Code § 2-534(a)(4) ..... 0
15. Exemption 5 - D.C. Official Code § 2-534(a)(5) ..... 0

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

#### **TIME-FRAMES FOR PROCESSING FOIA REQUESTS**

23. Number of FOIA requests processed within 15 days.....	12
24. Number of FOIA requests processed between 16 and 25 days.....	5
25. Number of FOIA requests processed in 26 days or more.....	0
26. Median number of days to process FOIA Requests.....	15

#### **RESOURCES ALLOCATED TO PROCESSING FOIA REQUESTS**

27. Number of staff hours devoted to processing FOIA requests.....	approximately 40 hours
28. Total dollar amount expended by public body for processing FOIA requests.....	unknown

#### **FEES FOR PROCESSING FOIA REQUESTS**

29. Total amount of fees collected by public body.....	\$0
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#### **PROSECUTIONS PURSUANT TO SECTION 207(d) OF THE D.C. FOIA**

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

The majority of FOIA requests DCRB receives pertain to investment matters and related materials. To ensure full transparency and facilitate responding to these responses, DCRB affirmatively posts publicly available information regarding its investment activity and fund performance on its website. Other common requests concern personal information of our members protected under D.C. Official Code § 2-534(a)(2).

