

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF THE CHIEF FINANCIAL OFFICER



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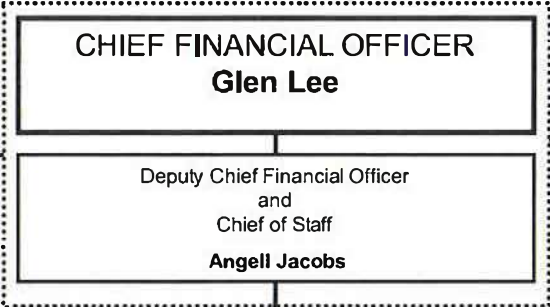
1.	Executive Office of the Office of Chief Financial Officer
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3.	➤ Executive Support: Office of Human Resources
4.	➤ Executive Support: Office of Integrity and Oversight
5.	➤ Executive Support: Office of Management and Administration
6.	➤ Executive Support: Office of the Chief Information Officer
7.	➤ Executive Support: Office of the Chief Risk Officer
8.	Office of Budget and Planning
9.	Office of Finance and Treasury
10.	Office of Financial Operations and Systems
11.	Office of Revenue Analysis
12.	Office of Tax and Revenue

Government of the District Columbia
 Office of the Chief Financial Officer
 Organizational Chart

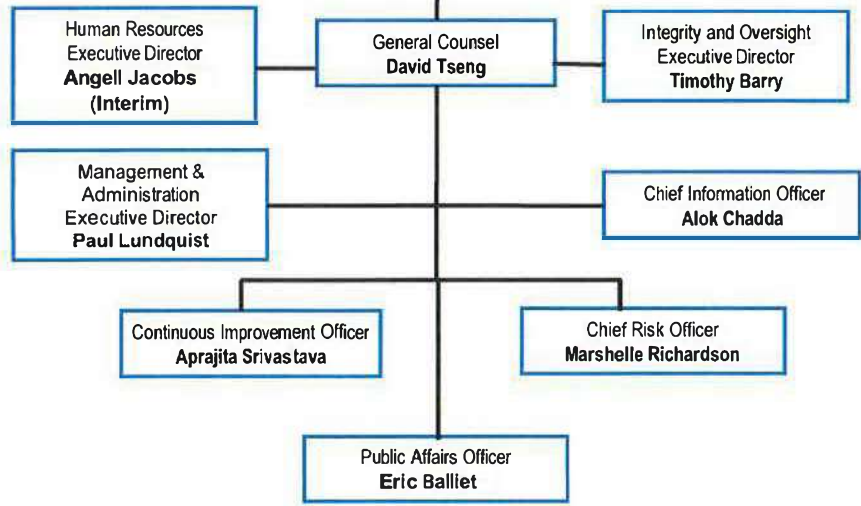
CENTRAL FINANCIAL OPERATIONS - Deputy CFOs

- Office of Budget and Planning (OBP)
Eric Cannady
- Office of Finance and Treasury (OFT)
Carmen Pigler
- Office of Financial Operations and Systems (OFOS)
Kimberly Williams
- Office of Revenue Analysis (ORA)
Fitzroy Lee
- Office of Tax and Revenue (OTR)
Keith Richardson

EXECUTIVE OFFICE

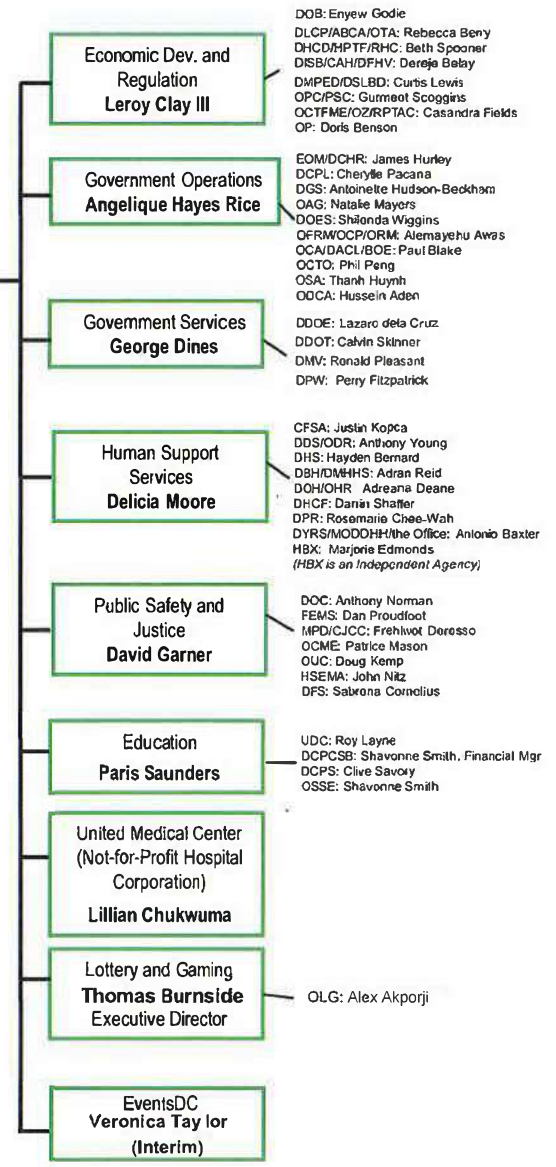


EXECUTIVE SUPPORT



AGENCY FINANCIAL OPERATIONS - Associate CFOs

Agency Fiscal Officers



- DOB: Enyew Godie
DLCP/ABCA/OTA: Rebecca Beny
DHCD/HPTF/RHC: Beth Spooner
DISB/CAH/DFHV: Dereje Belay
DMPED/DSLBD: Curtis Lewis
OPC/PSC: Gurmeet Scoggins
OCTFME/OZ/RPTAC: Casandra Fields
OP: Doris Benson
- EOM/DCHR: James Hurley
DCPL: Cheryle Pacana
DGS: Antoinette Hudson-Beckham
OAG: Natake Mayers
DOES: Shionda Wiggins
OFRM/OCP/ORM: Alemayehu Awais
OCA/DACL/BOE: Paul Blake
OCTO: Phil Peng
OSA: Thanh Huynh
ODCA: Hussein Aden
- DDOE: Lazaro dela Cruz
DDOT: Calvin Skinner
DMV: Ronald Pleasant
DPW: Perry Fitzpatrick
- CFSA: Justin Kopca
DDS/ODR: Anthony Young
DHS: Hayden Bernard
DBH/DMHS: Adran Reid
DOH/OHR: Adreana Deane
DHCF: Danae Shaffer
DPR: Rosamaria Chee-Wah
DYRS/MODDHH/the Office: Antonio Baxter
HBX: Marjorie Edmonds
(HBX is an Independent Agency)
- DOC: Anthony Norman
FEMS: Dan Proudfoot
MPD/CJCC: Freshnot Dorosso
OCME: Patrice Mason
OUC: Doug Kemp
HSEMA: John Nitz
DFS: Sabrina Cornelius
- UDC: Roy Layne
DCPCSB: Shavonne Smith, Financial Mgr
DCPS: Clive Savory
OSSE: Shavonne Smith
- OLG: Alex Akporji

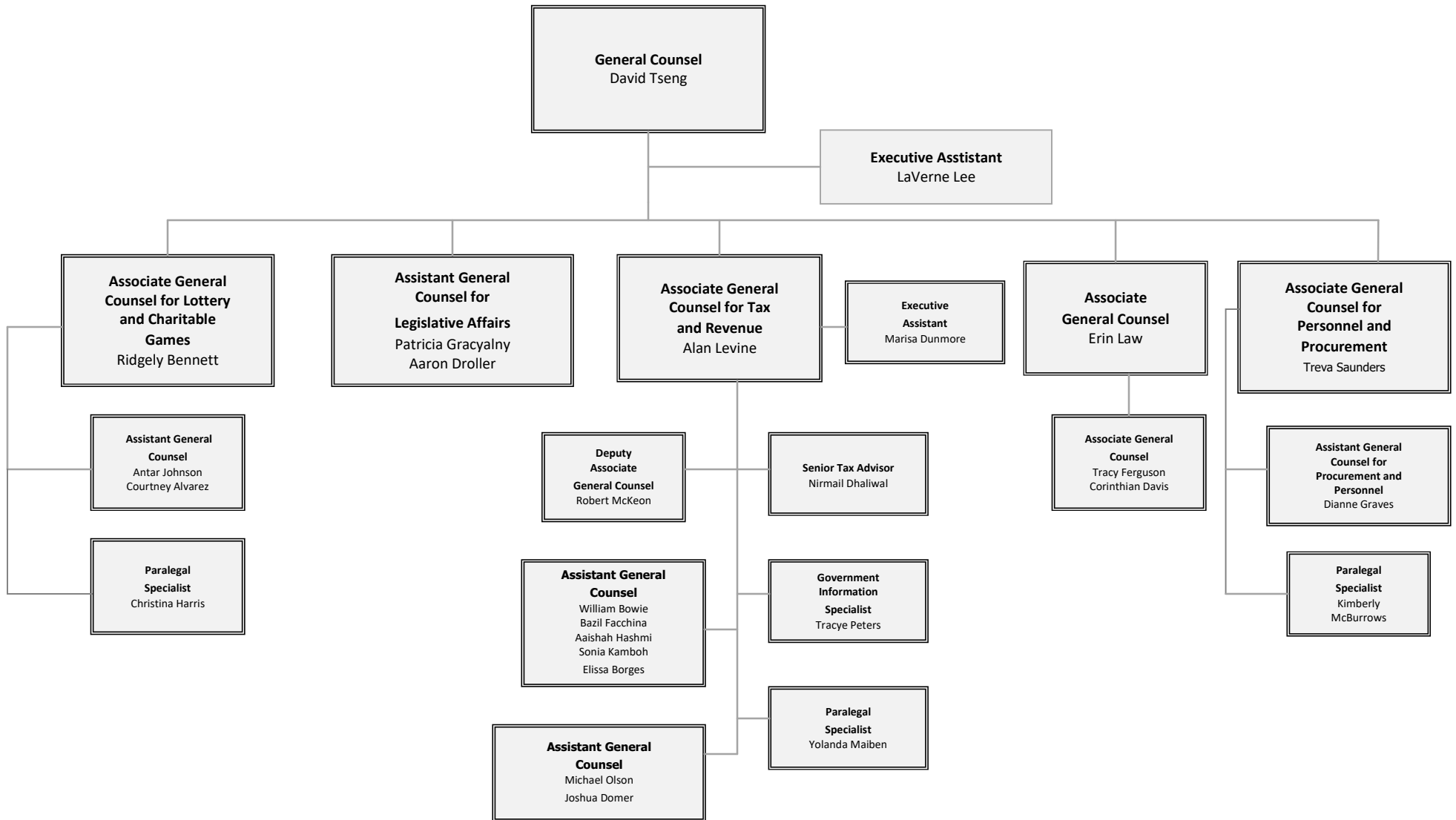
GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF THE CHIEF FINANCIAL OFFICER



OFFICE OF THE GENERAL COUNSEL

The role and responsibility of the Office of the General Counsel is to:

- Direct the legal resources of the OCFO with respect to Federal and District appropriations, contracting and procurement, and accounting and financial transactions
- Represent the Chief Financial Officer in litigation and in other legal matter in which the CFO is a party or has legal interest
- Supervise and manage outside counsel in all legal matters
- Assure the legal sufficiency of the OCFO's program and policies.

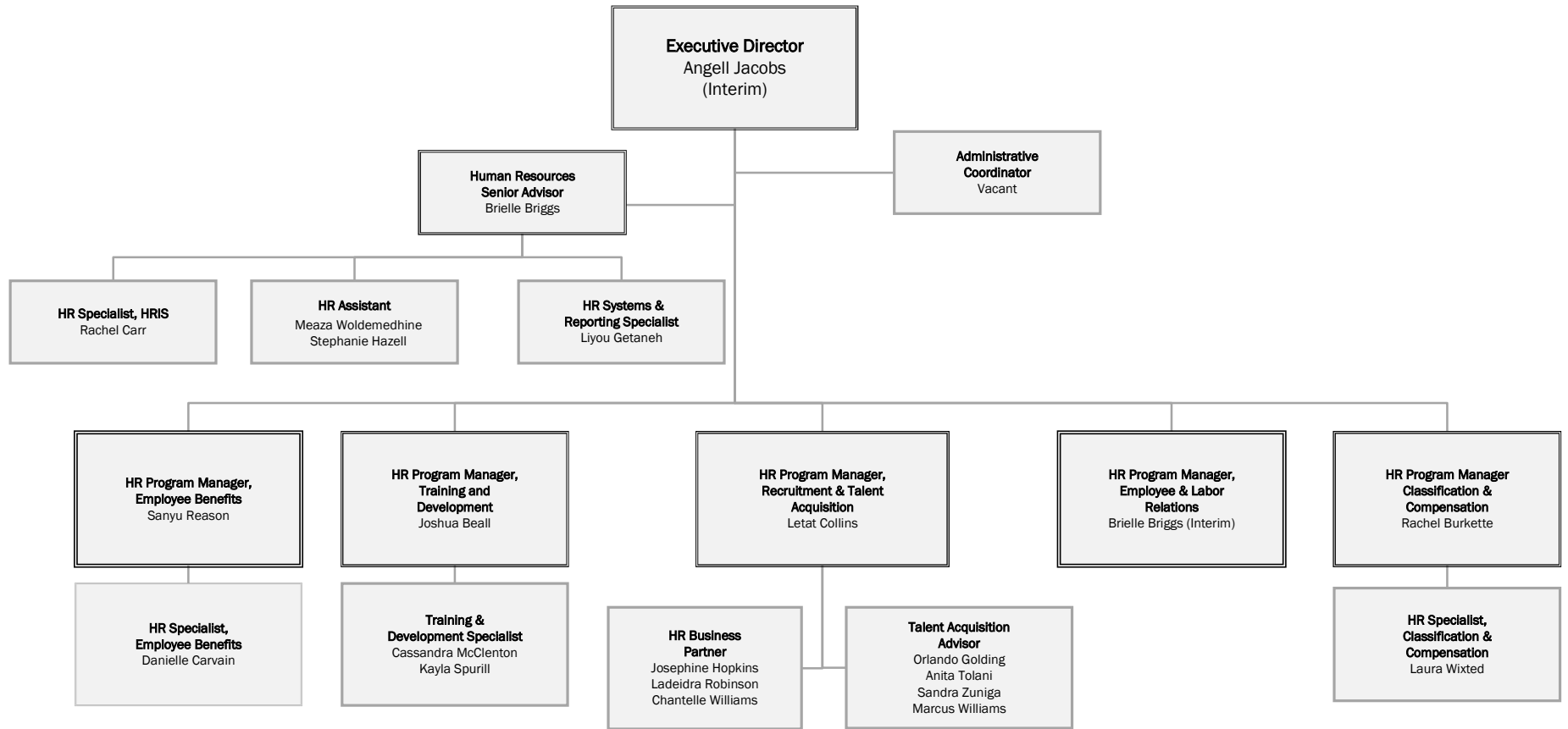


GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF THE CHIEF FINANCIAL OFFICER



OFFICE OF HUMAN RESOURCES

The Office of Human Resources provides effective human resources management services to attract, develop and retain top talent. We commit to strategically build and maintain collaborative partnerships, uphold policies and procedures, and deliver innovative programs in support of the OCFO's mission.

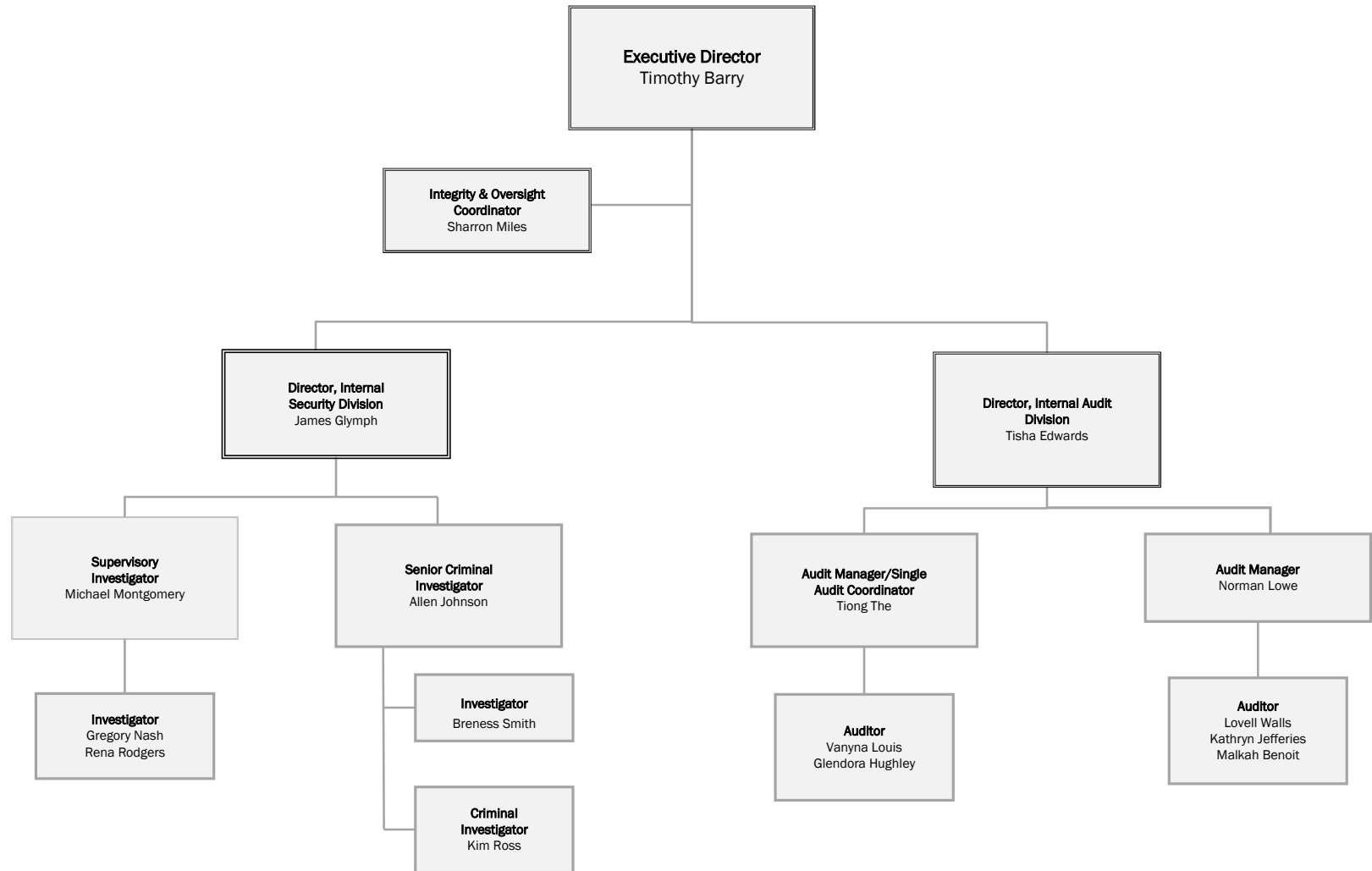


GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF THE CHIEF FINANCIAL OFFICER



OFFICE OF INTEGRITY AND OVERSIGHT

The Office of Integrity and Oversight's (OIO) mission is to ensure accountability, integrity, and efficiency is maintained in the financial management and tax administration systems of the Government of the District of Columbia. Through its audit and investigative resources, OIO provides the CFO with independent appraisal of OCFO operations and assures the highest standards of integrity and security of OCFO employees.



GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF THE CHIEF FINANCIAL OFFICER

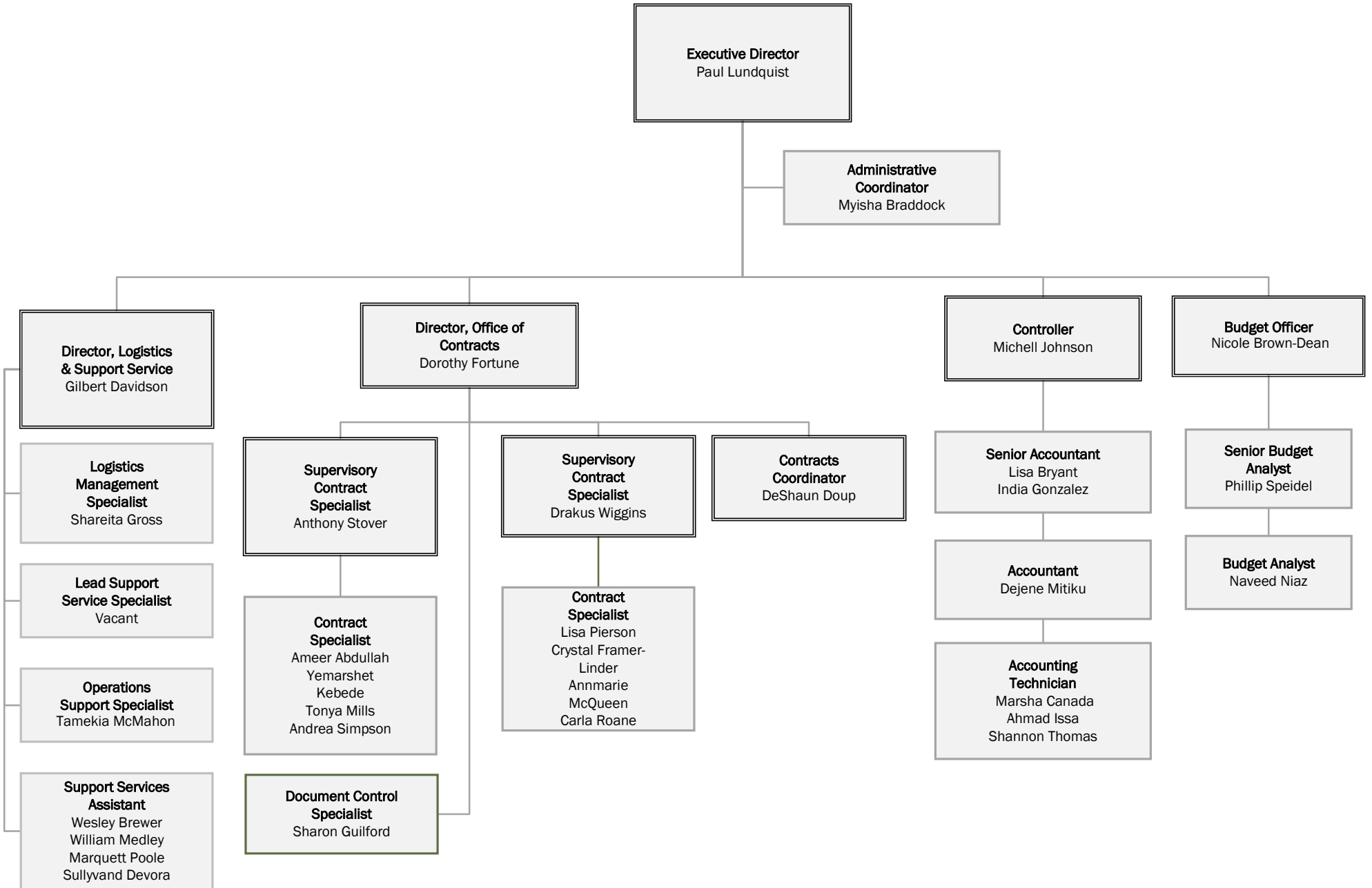


OFFICE OF MANAGEMENT AND ADMINISTRATION

The mission of the Office of Management and Administration is to provide financial, procurement, and logistical support services to the OCFO that are timely, accurate, relevant, and of high quality.

Key Responsibilities:

- Develops and implements annual OCFO budget and financial plan
- Contracts for commodities and services in support of the OCFO
- Maintains position and fund controls to assure that agency spending remains within authorized limits; tracks agency spending
- Processes agency vendor payments and employee reimbursements
- Manages agency logistical needs, including space planning, vehicle management, mailings, transportation of staff and documents, and building maintenance

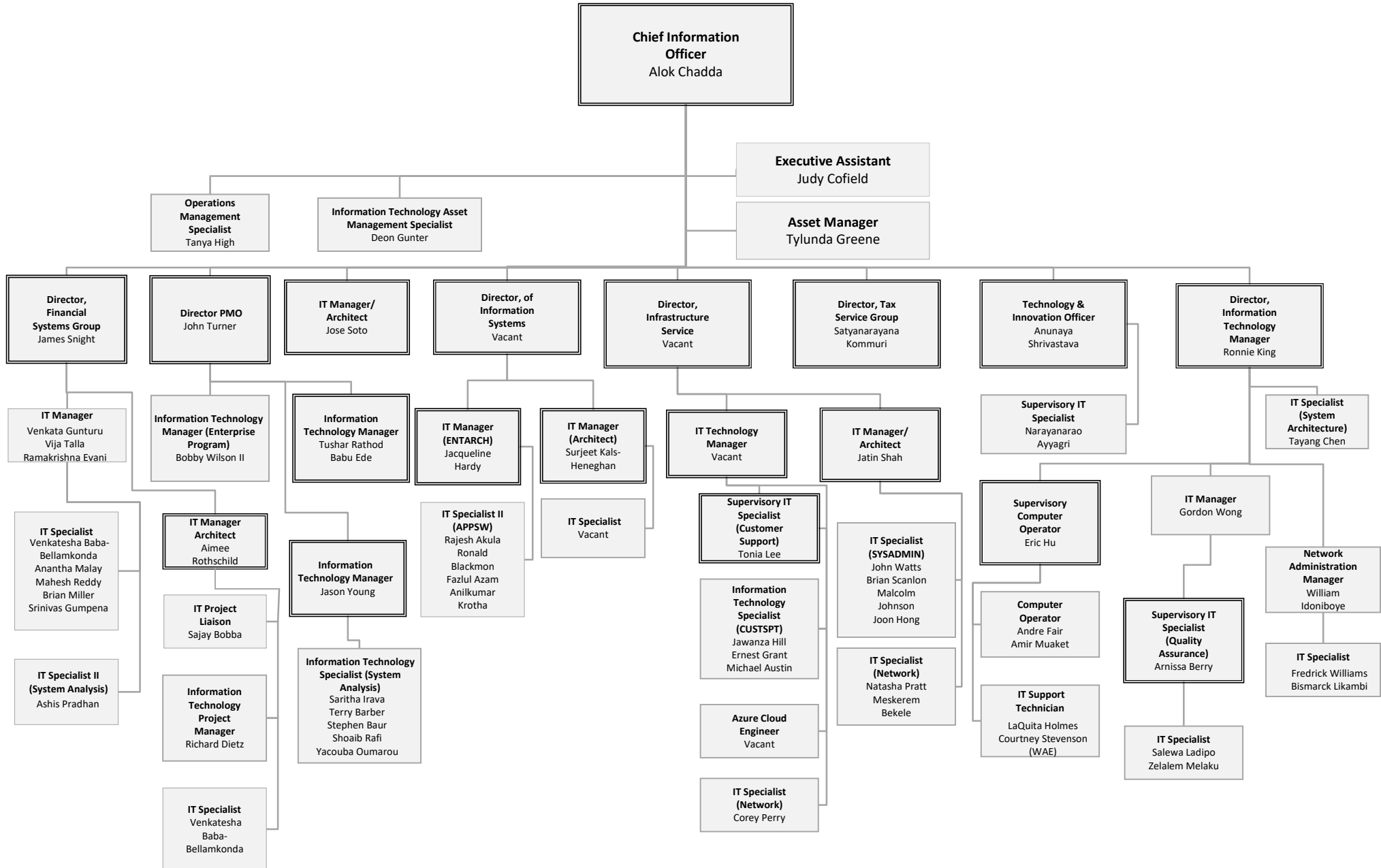


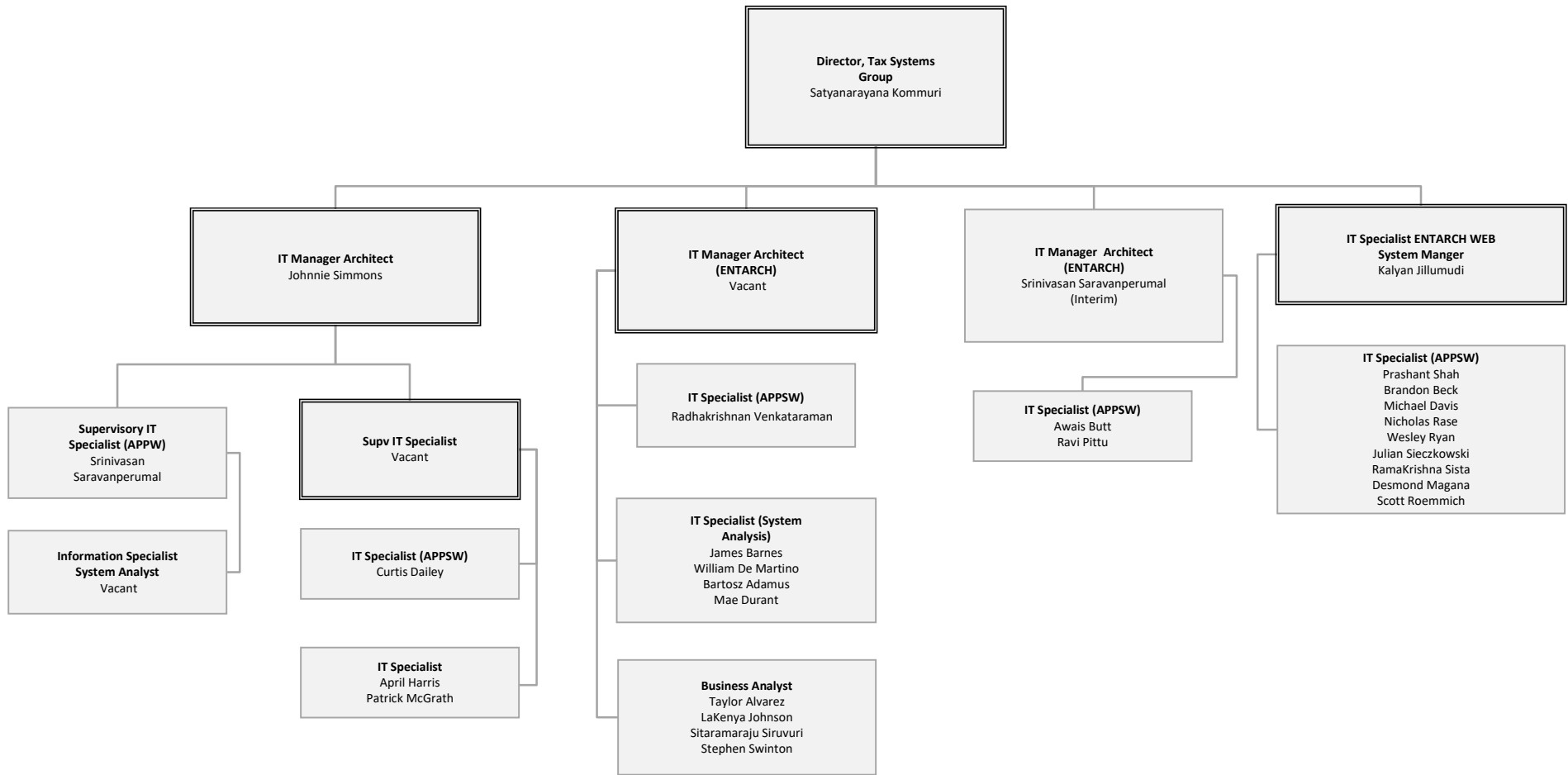
GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF THE CHIEF FINANCIAL OFFICER



OFFICE OF THE CHIEF INFORMATION OFFICER

The mission of the Office of the Chief Information Officer (OCIO) is to manage and direct the Information Technology operations, activities, and employees within all OCFO offices and departments. The OCIO is committed to delivering innovative, cost effective, and secure IT solutions and infrastructure that support OCFO' s programs and initiatives, preserve the independent status of the District's Office of the Chief Financial Officer, provide excellent customer service, enable the continuous improvement of services, and enable transparency in government.



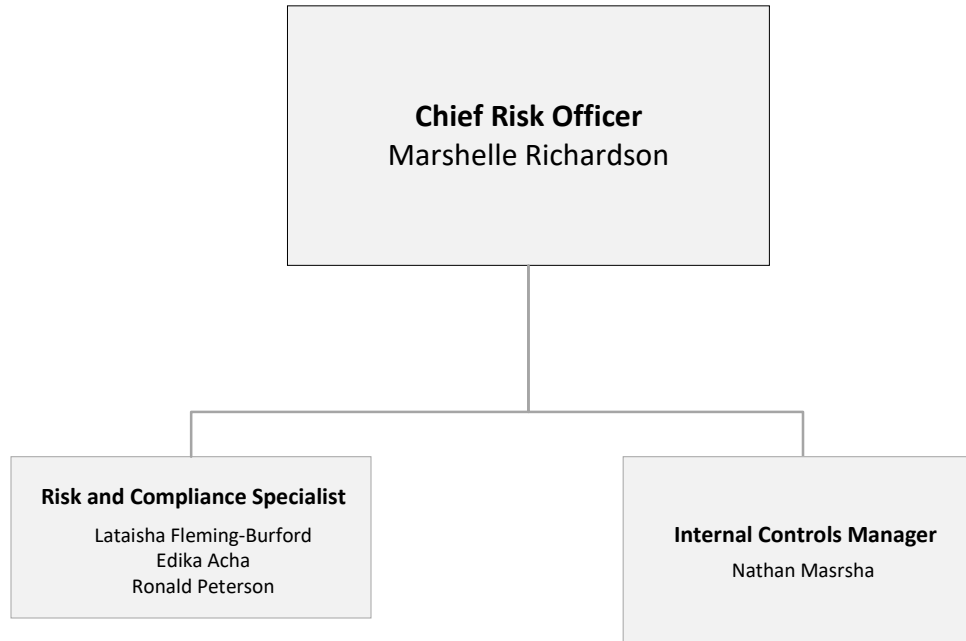


GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF THE CHIEF FINANCIAL OFFICER



OFFICE OF THE CHIEF RISK OFFICER

The role and responsibility of the Office of the Chief Risk Officer is to identify, assess, report, monitor and mitigate key strategic, operational, reputational, financial, and technological risks within the OCFO. Additionally, the unit establishes and institutionalizes an integrated risk management framework.



GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF THE CHIEF FINANCIAL OFFICER



OFFICE OF BUDGET AND PLANNING

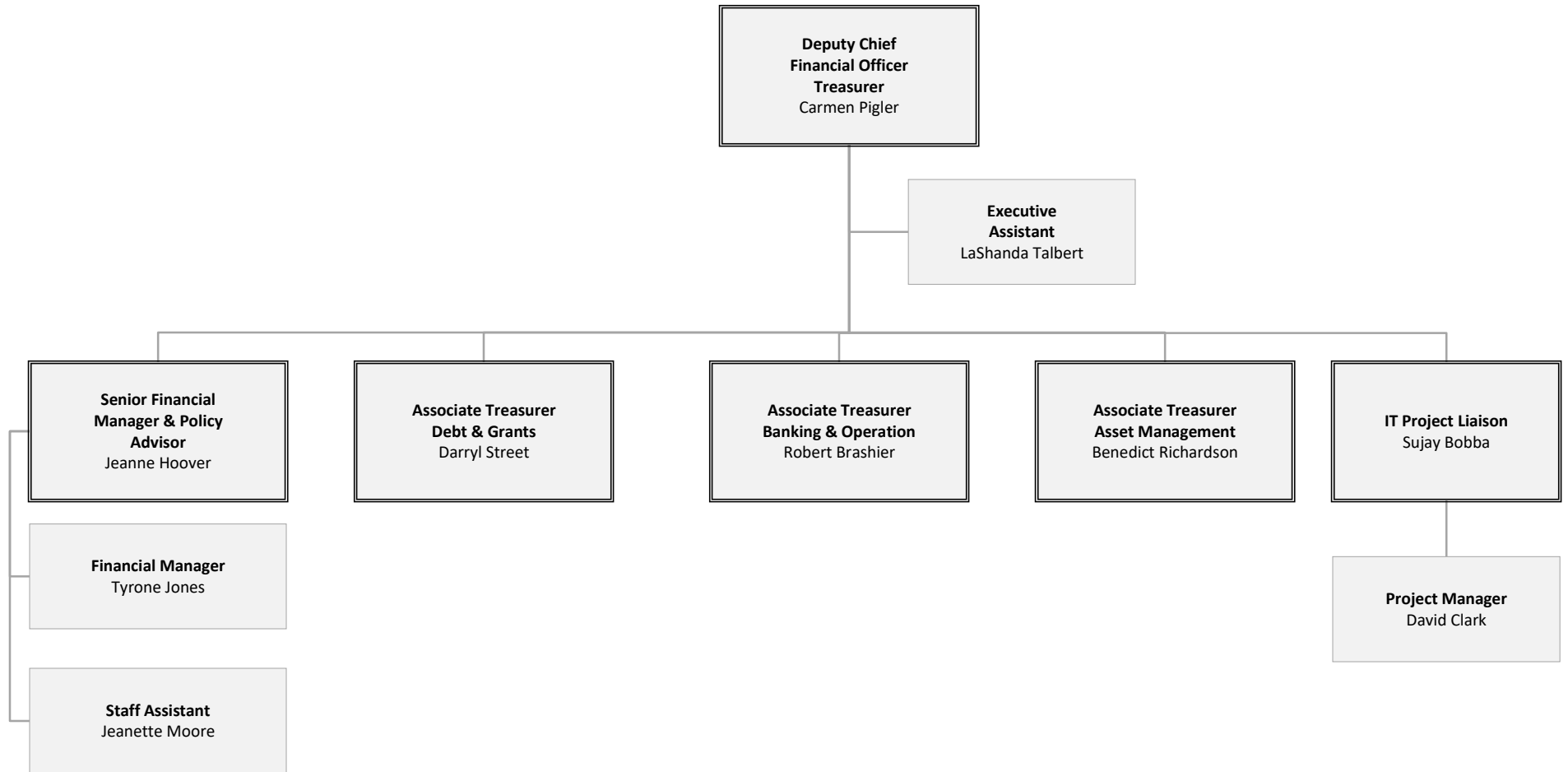
The mission of the Office of Budget and Planning (OBP) is to prepare, monitor, analyze, and execute the District government's budget, including operating, capital and enterprise funds in a manner that facilitates fiscal integrity and maximizes services to tax payers. In carrying out its mission, it is essential that OBP provide high-quality customer service to our internal and external customers.

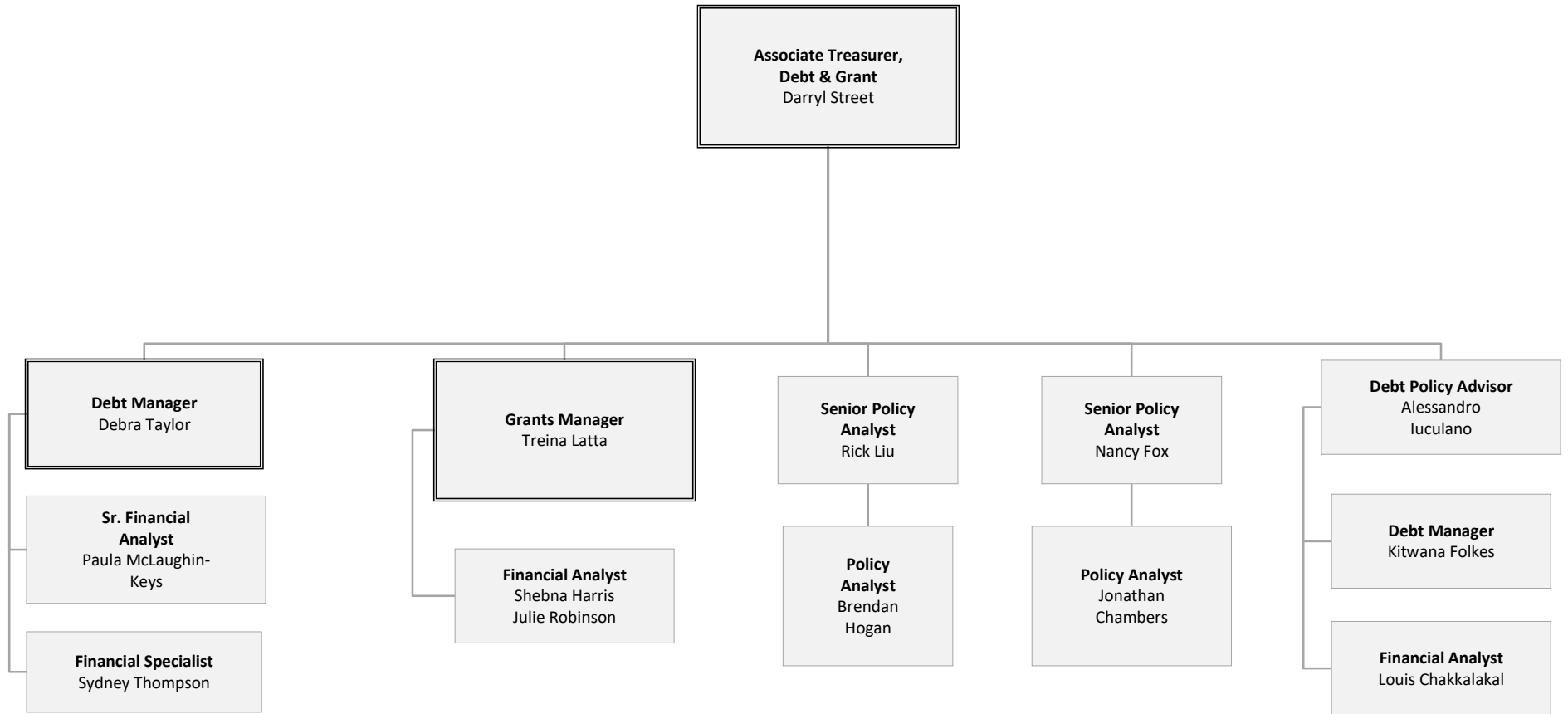
GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF THE CHIEF FINANCIAL OFFICER

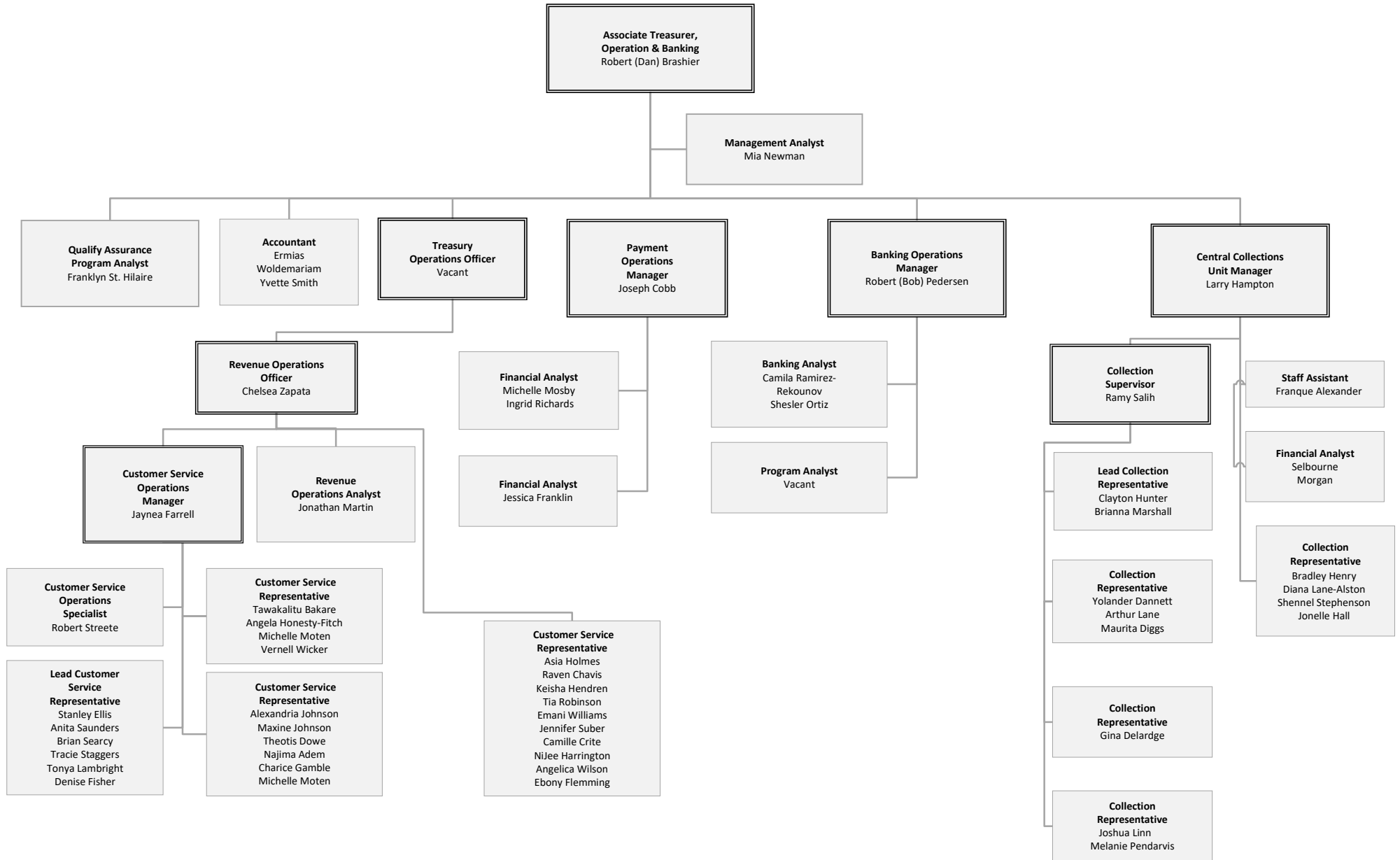


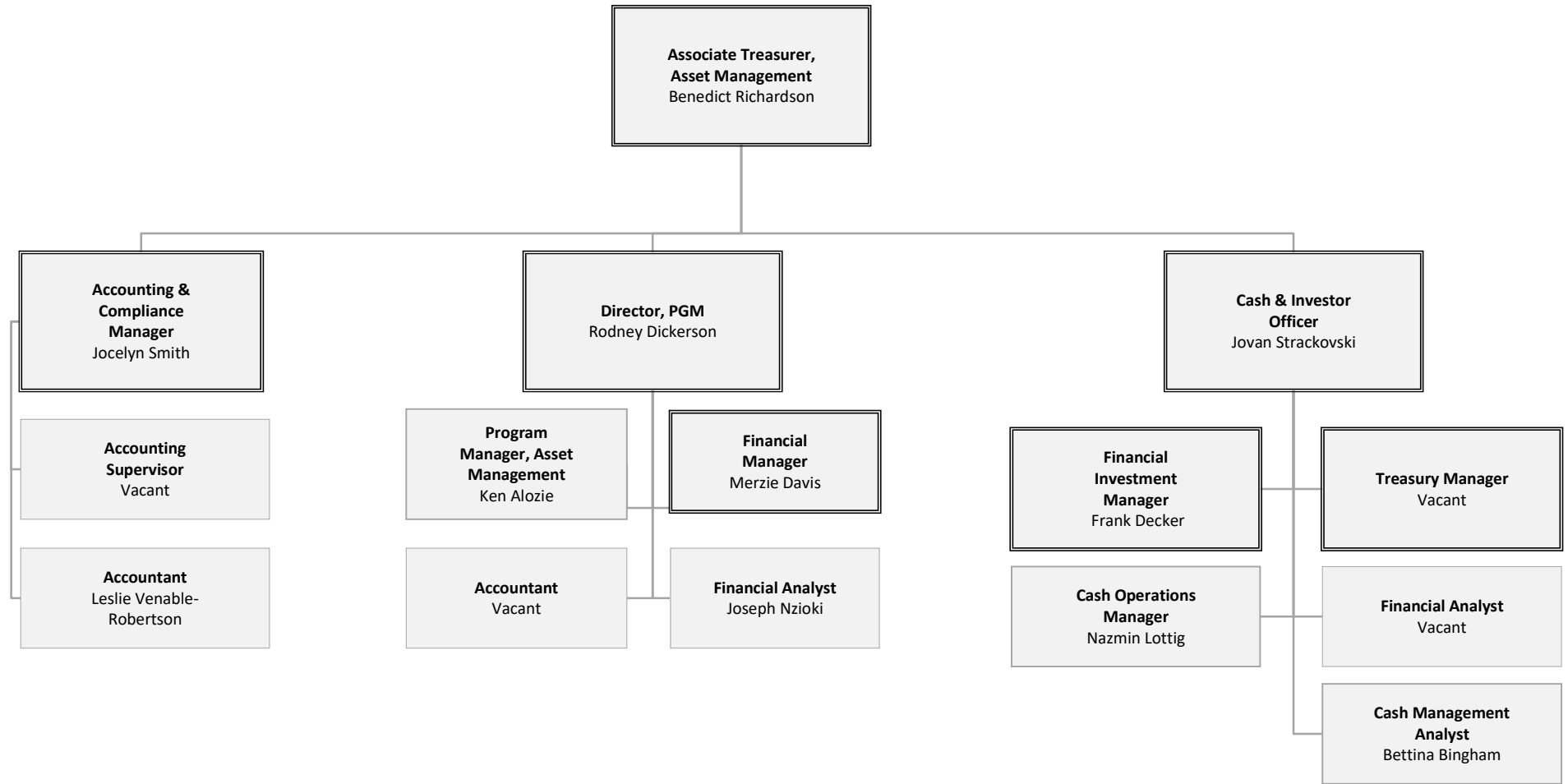
OFFICE OF FINANCE AND TREASURY

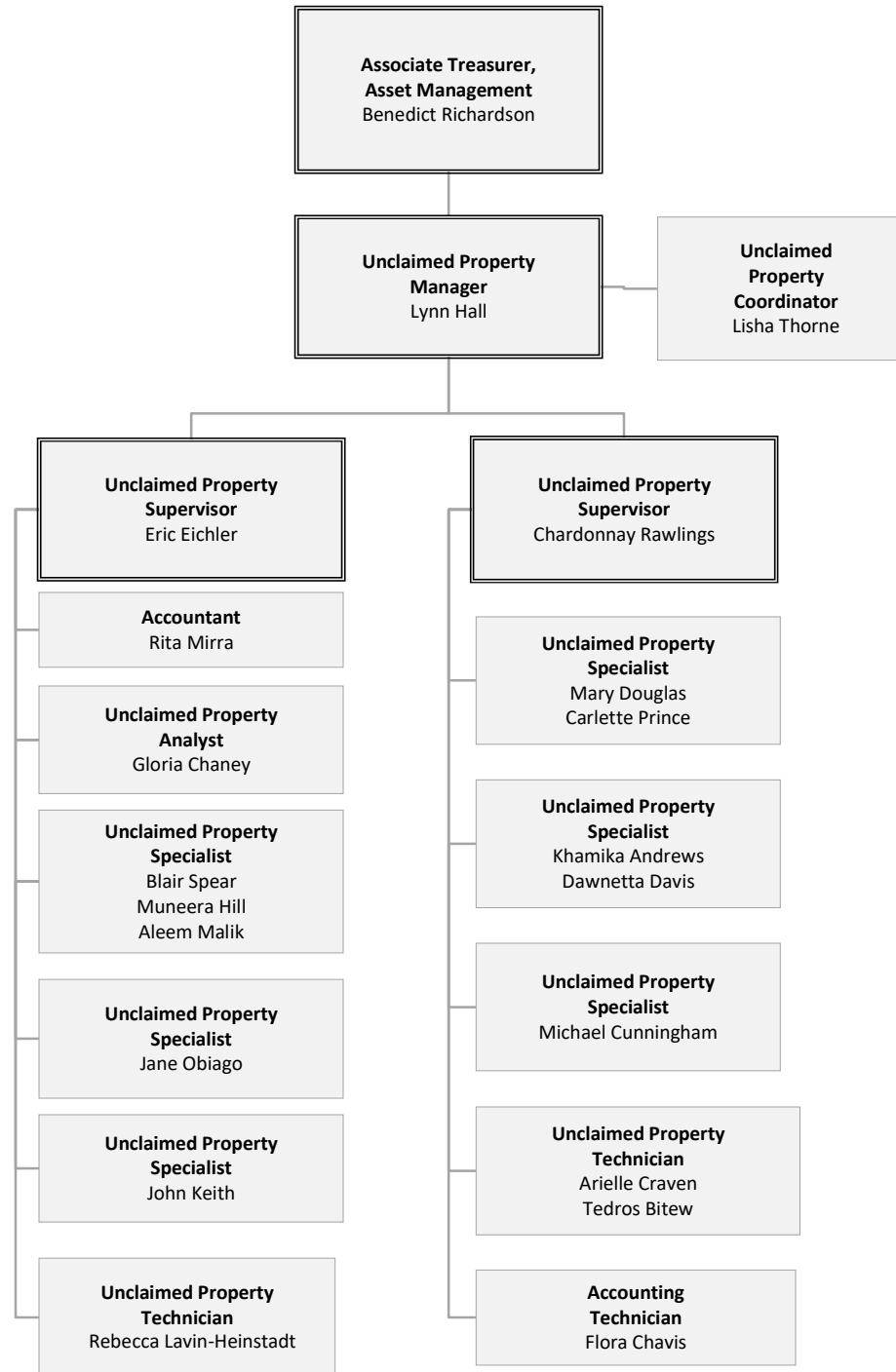
The mission of the Office of Finance and Treasury (OFT) is to efficiently and effectively manage the financial assets and liabilities of the Government of the District of Columbia. This includes receiving, safe-keeping, investing, disbursing, recording and acquiring District financial resources. The core financial assets are cash and equivalents and accounts receivable, and the core financial liabilities are debt and accounts payable. In carrying out this mission, it is essential that OFT provides high quality, customer-friendly service to its internal and external customers (other government agencies and the public).











GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF THE CHIEF FINANCIAL OFFICER

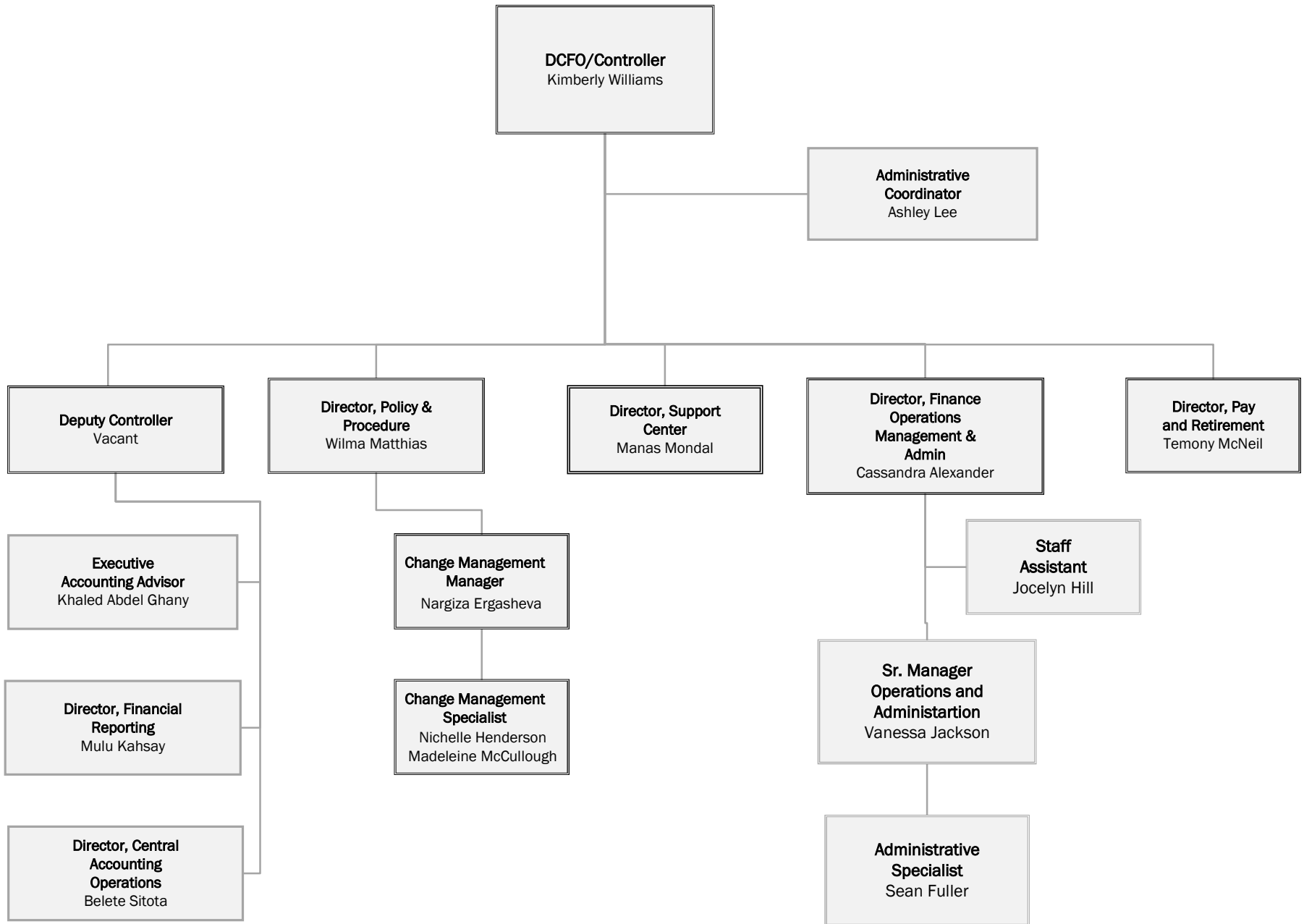


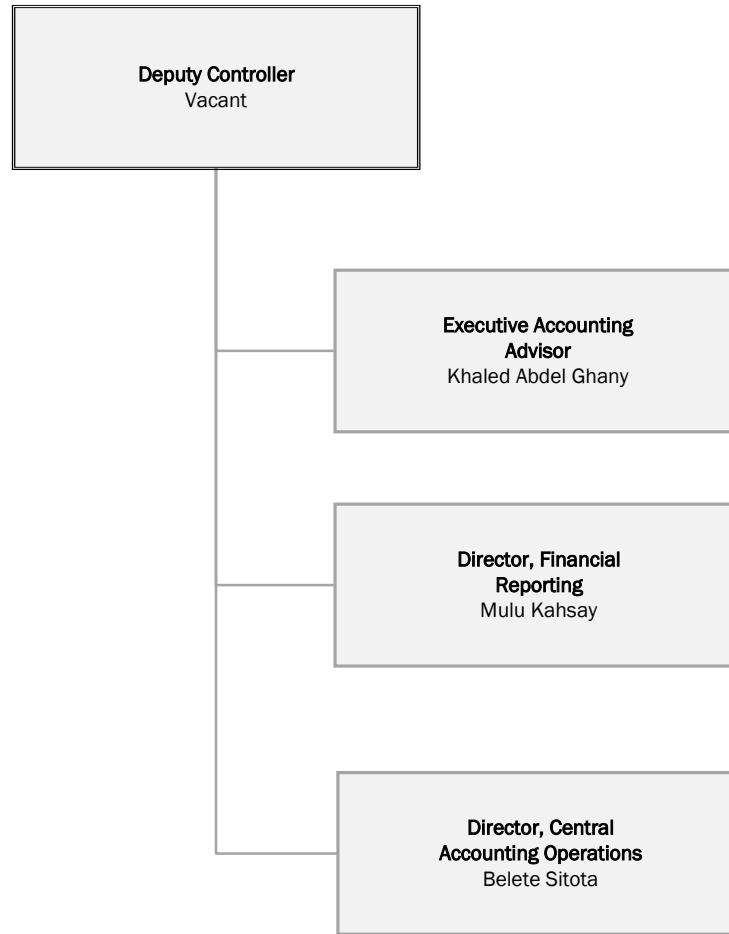
OFFICE OF FINANCIAL OPERATIONS AND SYSTEMS

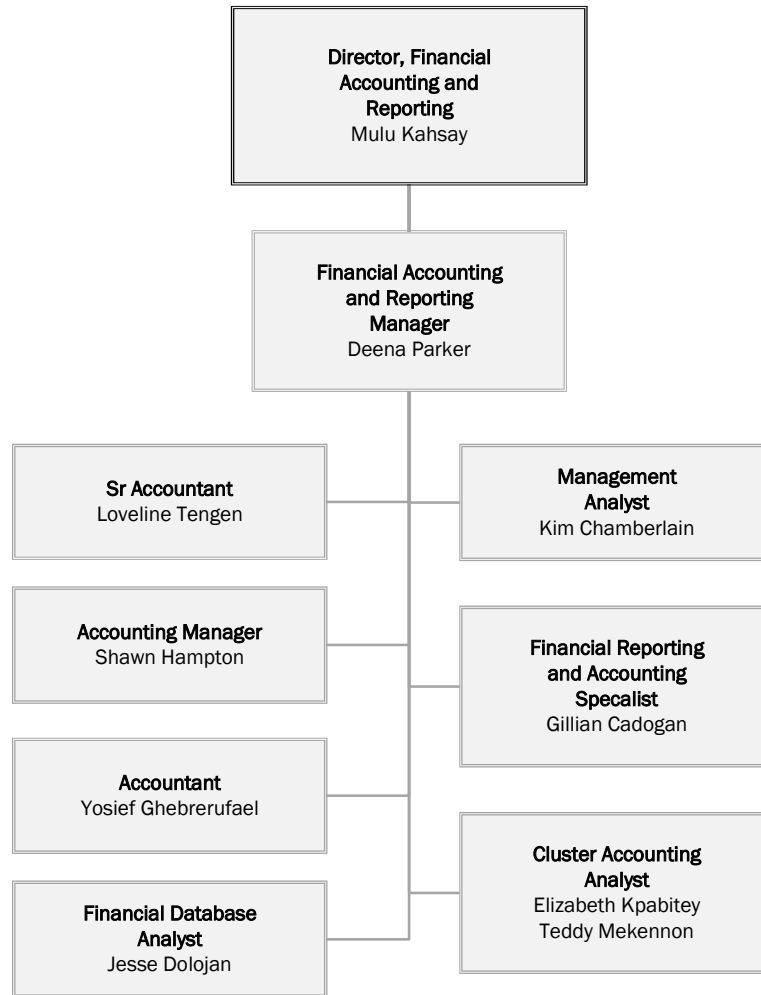
The Office of Financial Operations and Systems (OFOS) is an "oversight agency" that is staffed with individuals who are knowledgeable in interpreting and applying generally accepted accounting principles. In its oversight capacity, OFOS manages the District's overall accounting operations, fulfilling critical functions such as general ledger maintenance, accounting for business events, financial reporting, payroll processing and certain retirement-related services.

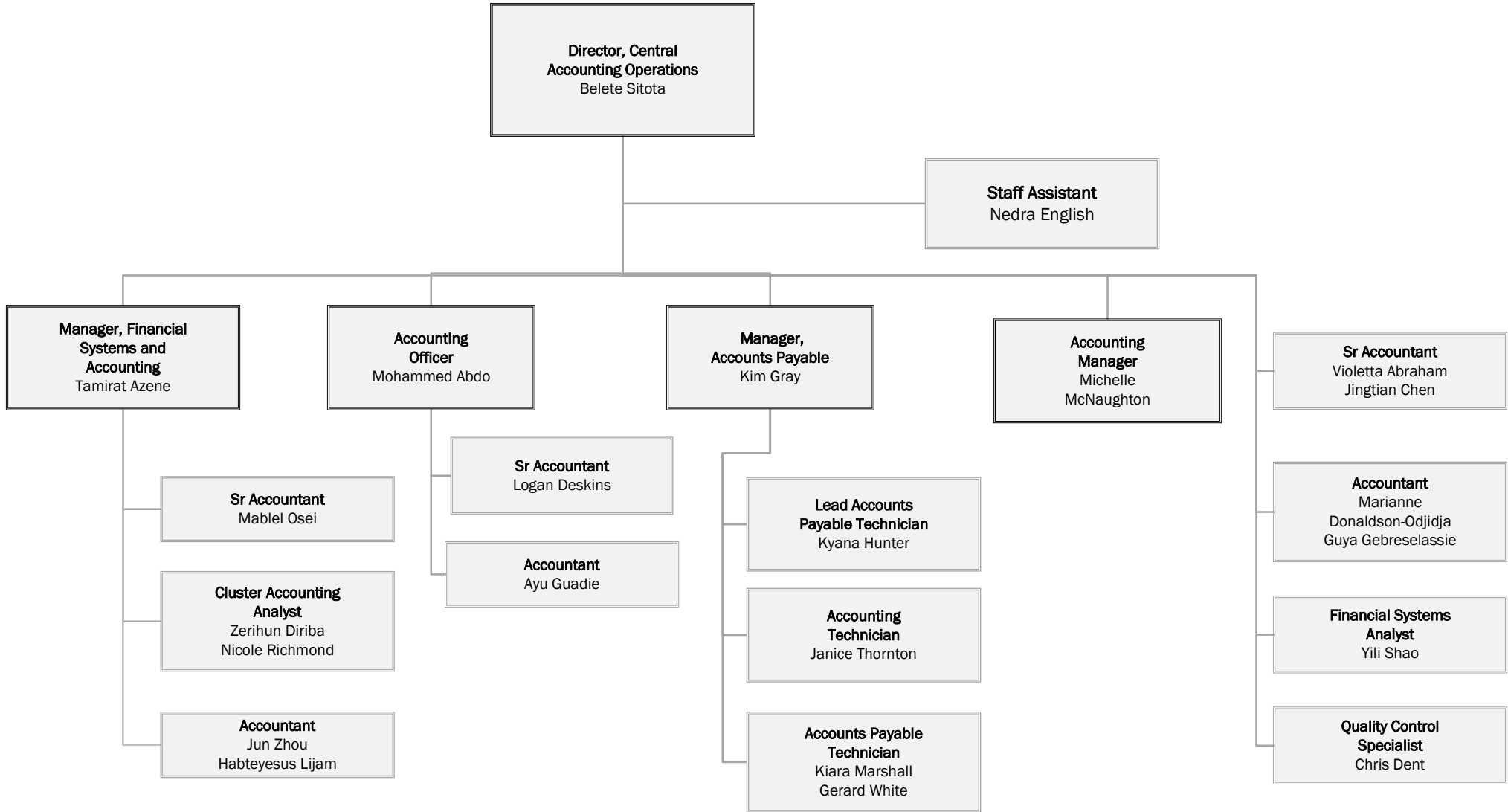
OFOS has two primary functions:

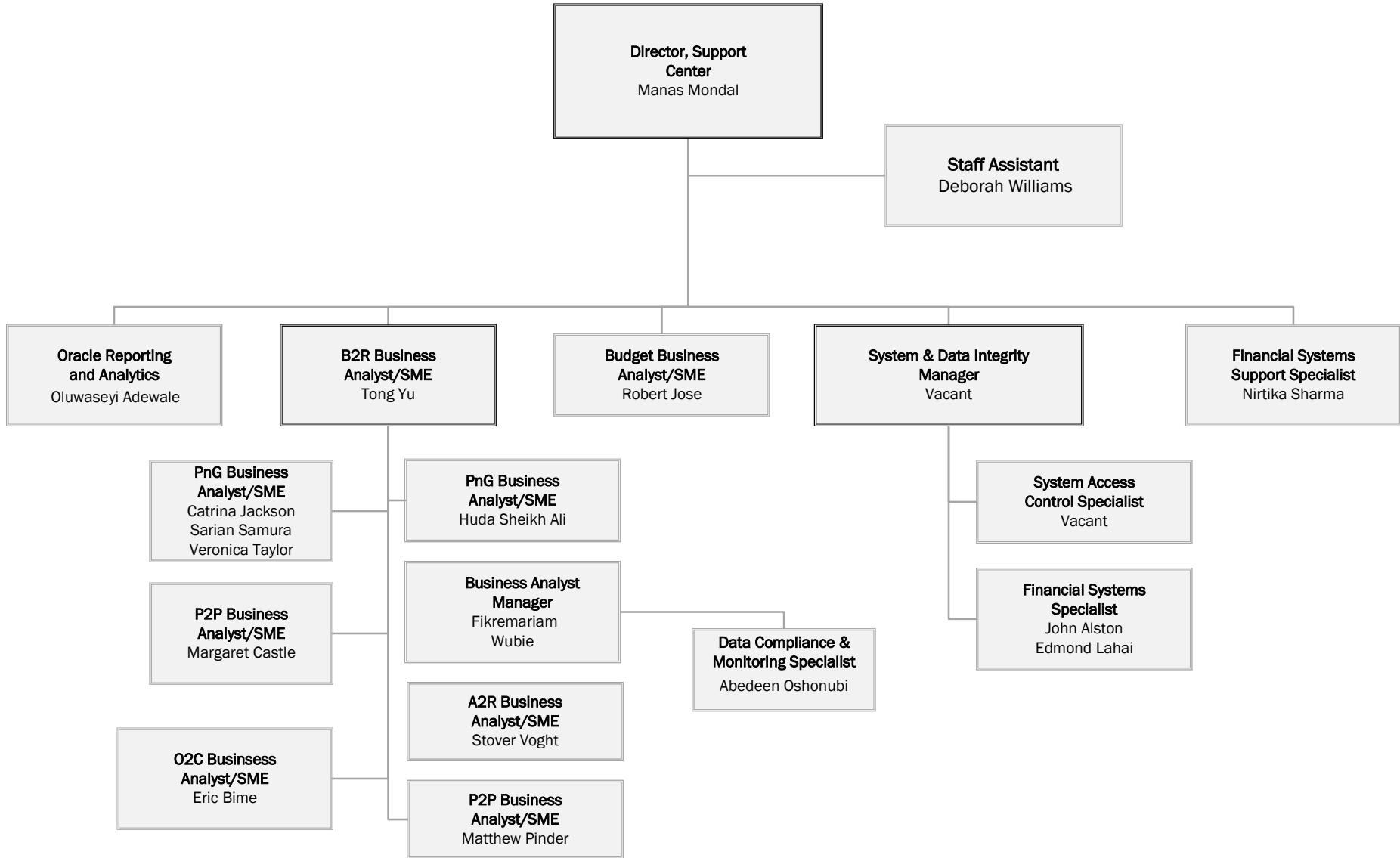
- Maintaining the District's general ledger, culminating with the production of the District's Comprehensive Annual Financial Report at the close of each fiscal year; and
- Administering the District's payroll and retirement systems.









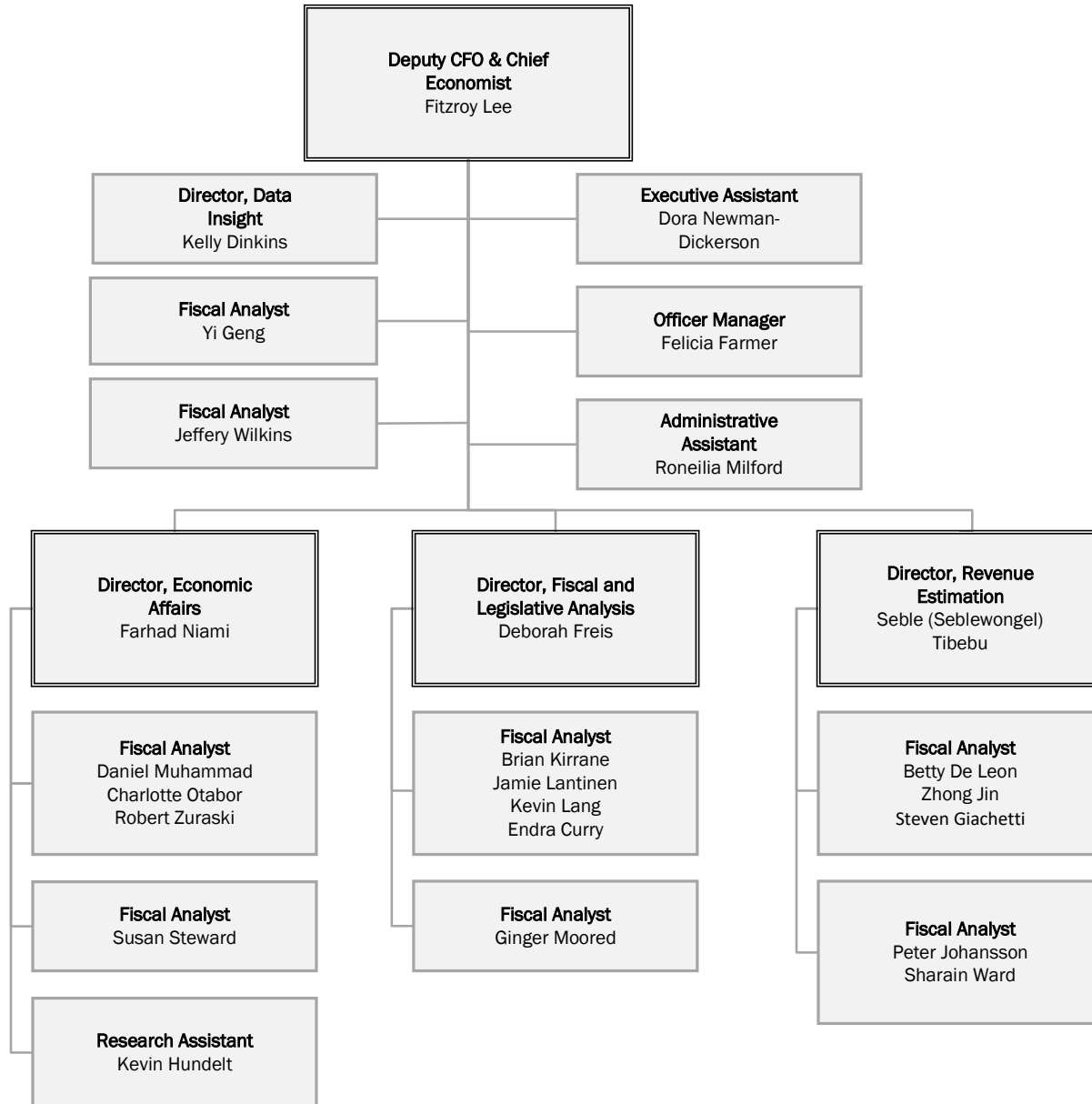


GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF THE CHIEF FINANCIAL OFFICER



OFFICE OF REVENUE ANALYSIS

The Office of Revenue Analysis' (ORA) mission is to support the budget and policymaking process with forecasts, estimates, and analyses that ensure the District's financial integrity. There are 3 main functions within ORA. They are Revenue Estimation, Fiscal and Legislative Analysis & Economic Affairs.

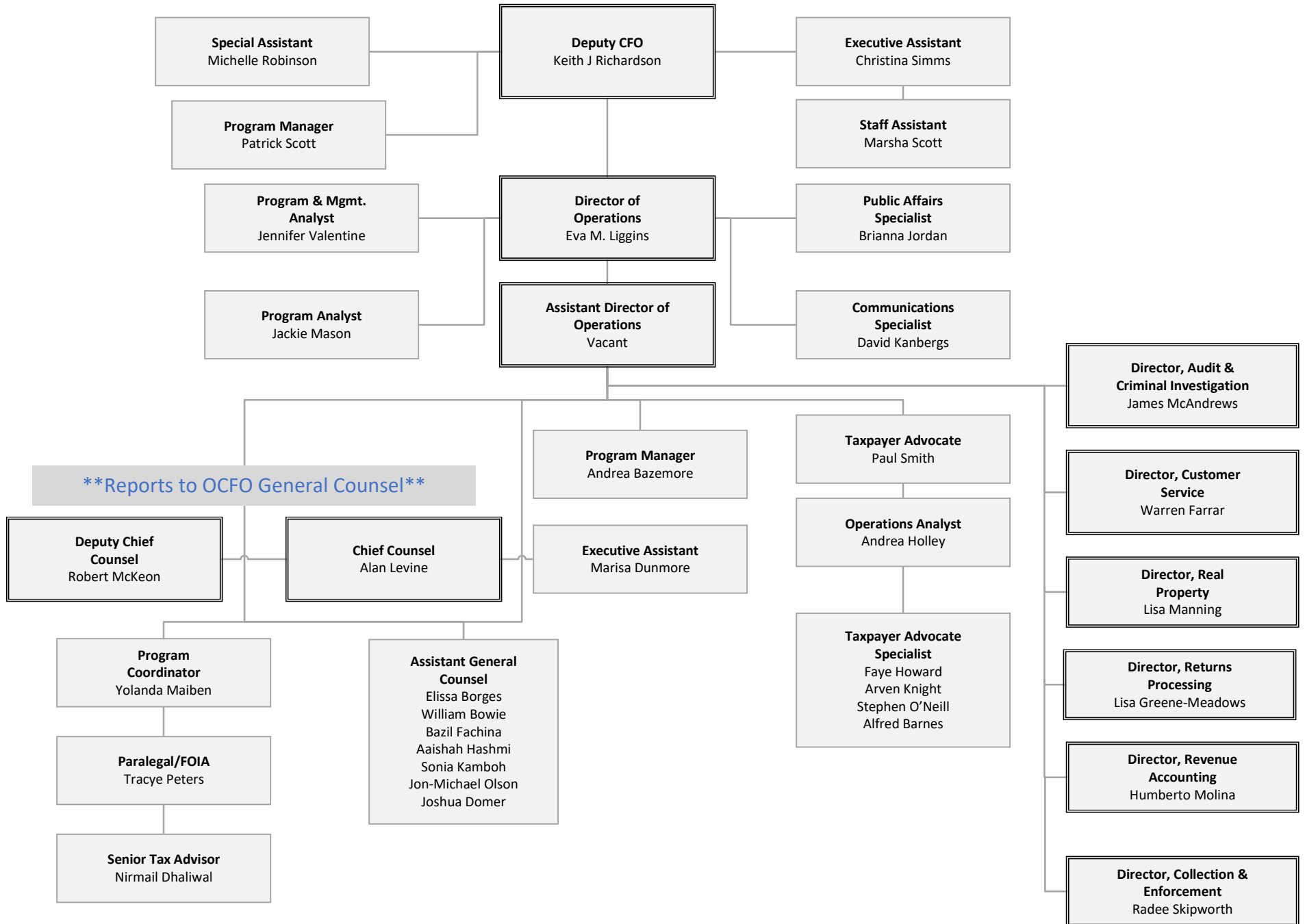


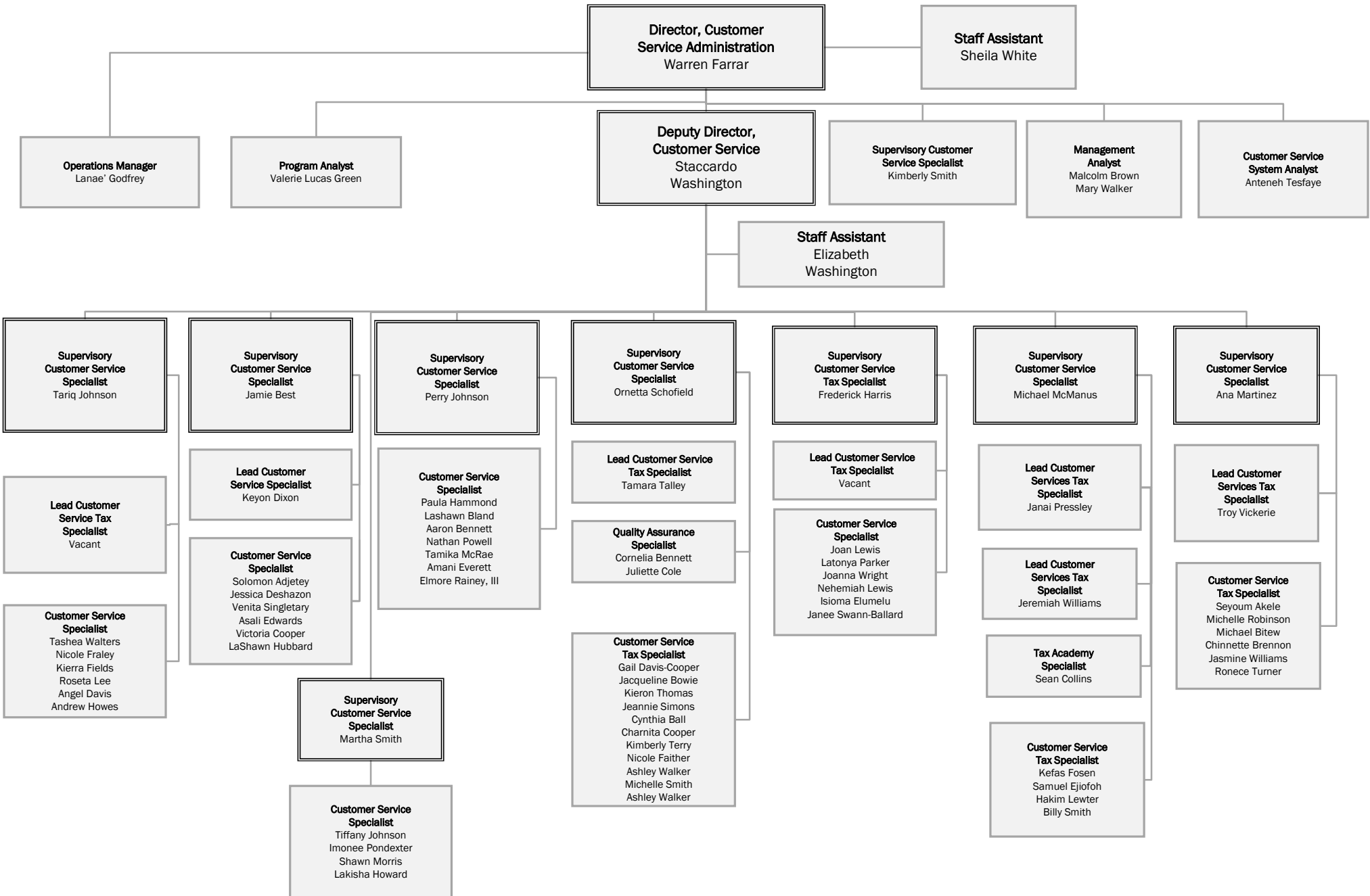
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OFFICE OF THE CHIEF FINANCIAL OFFICER

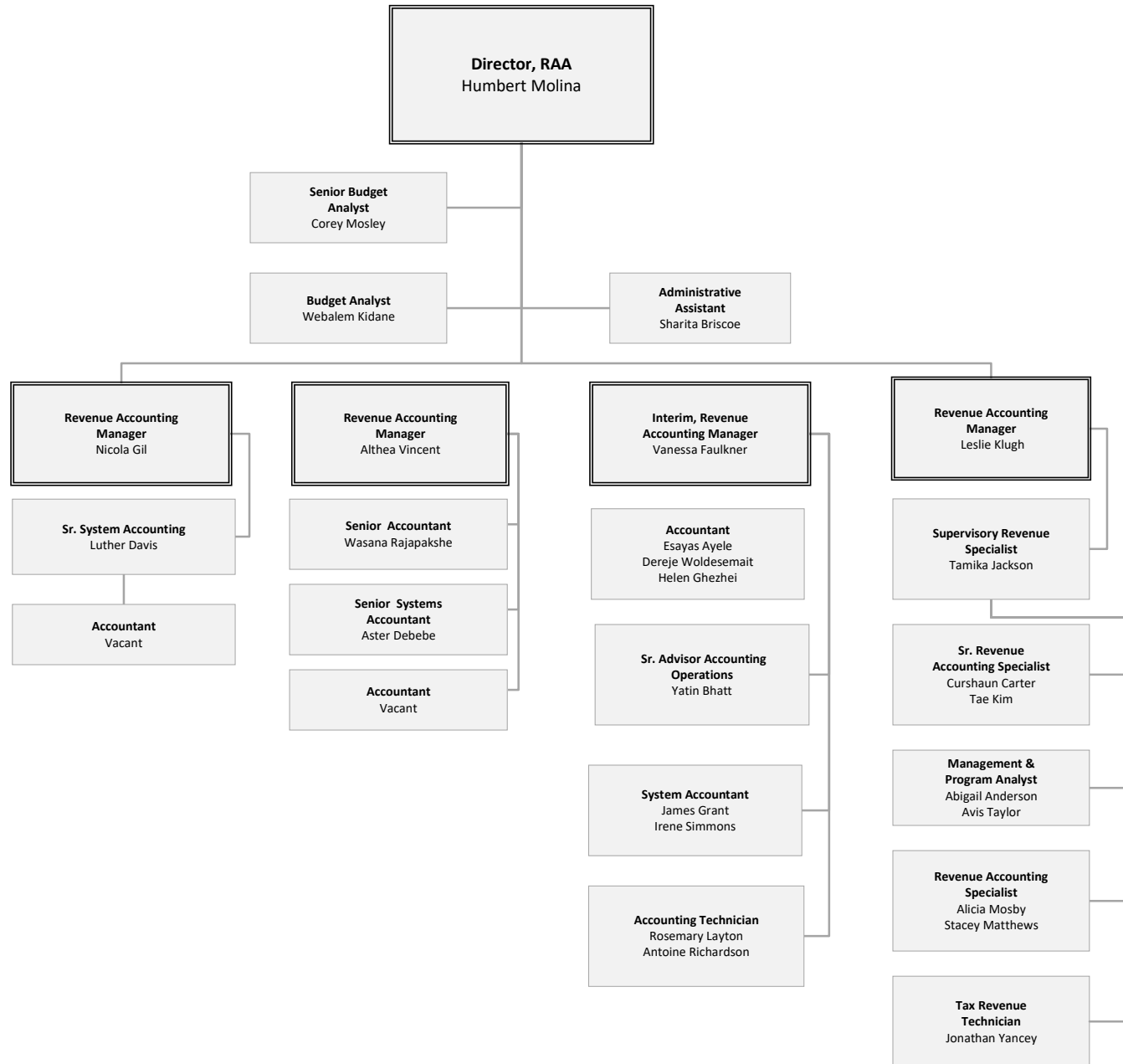


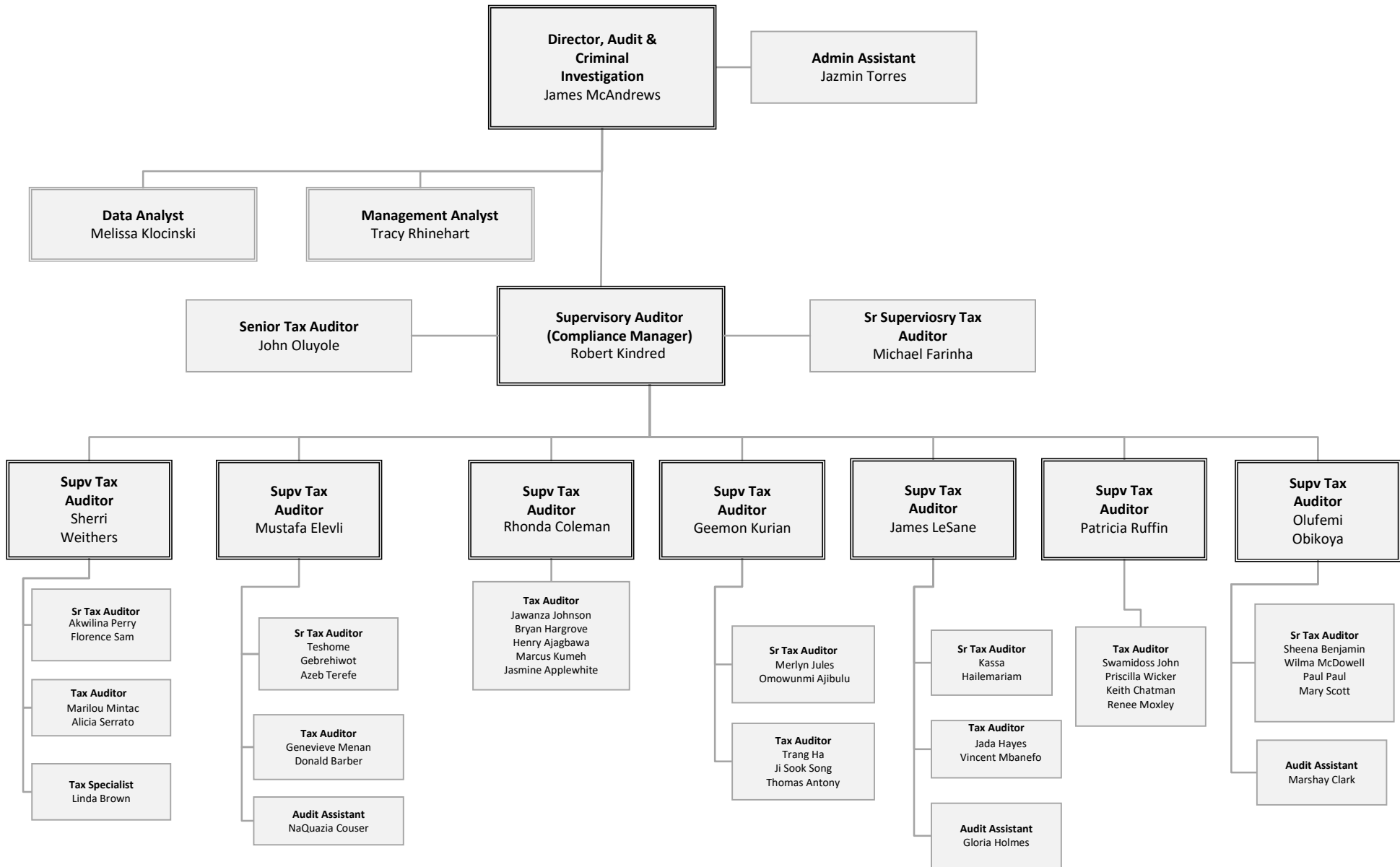
OFFICE OF TAX AND REVENUE

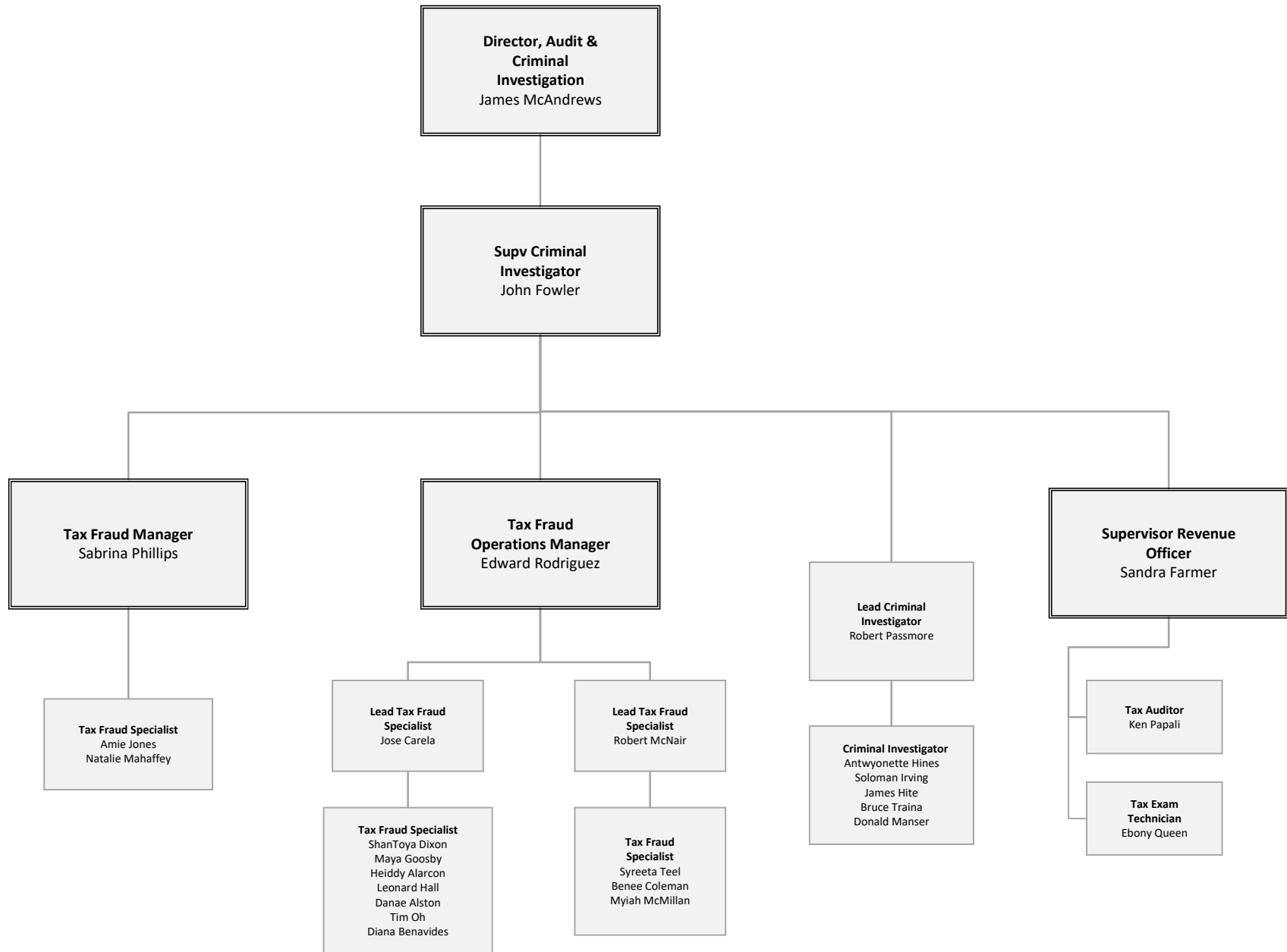
The role and responsibility of the Office of Tax and Revenue is to administer and enforce the District's tax laws, collecting revenue for the city, and record deeds and other written instruments affecting a right, title, or interest in real or personal property.

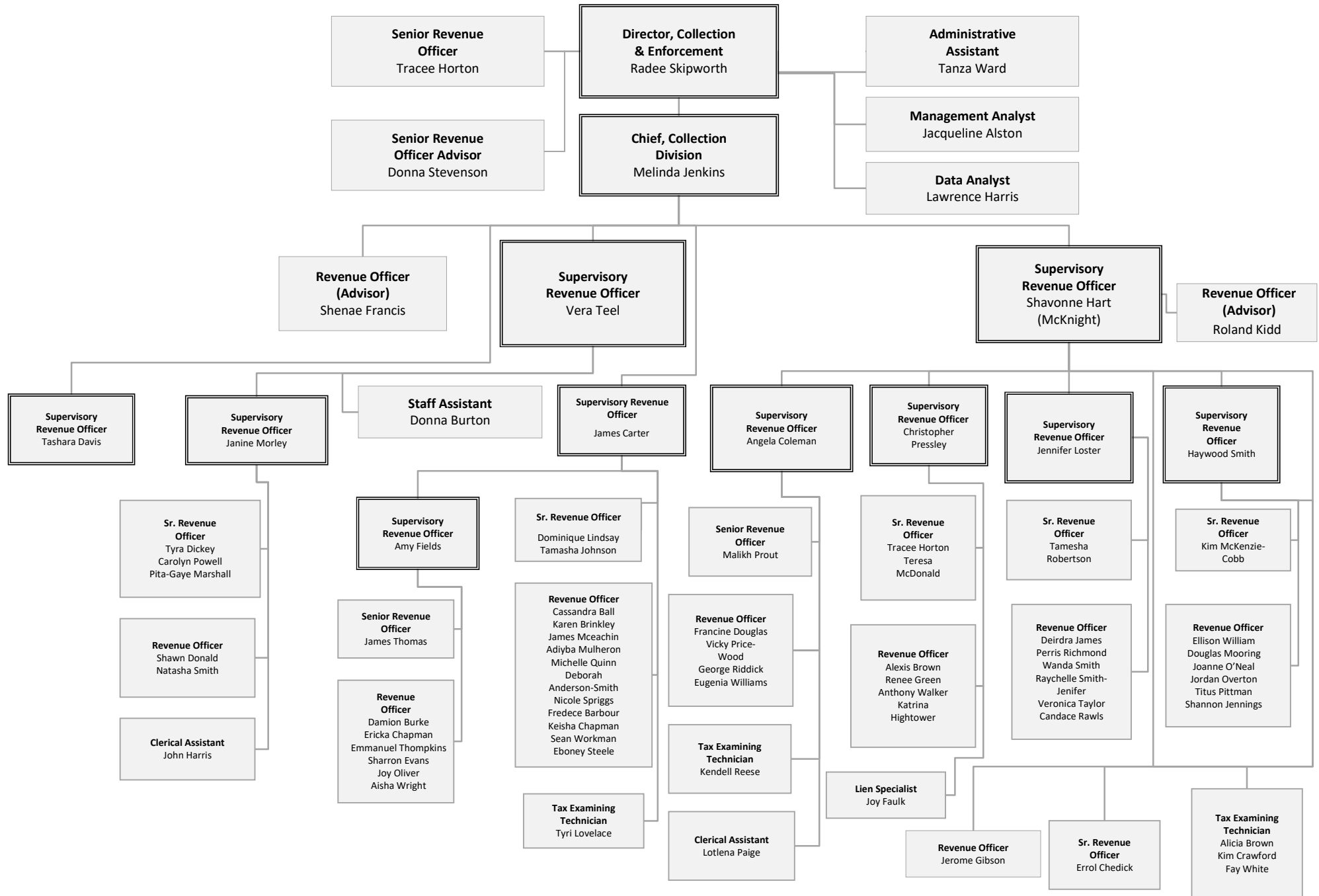


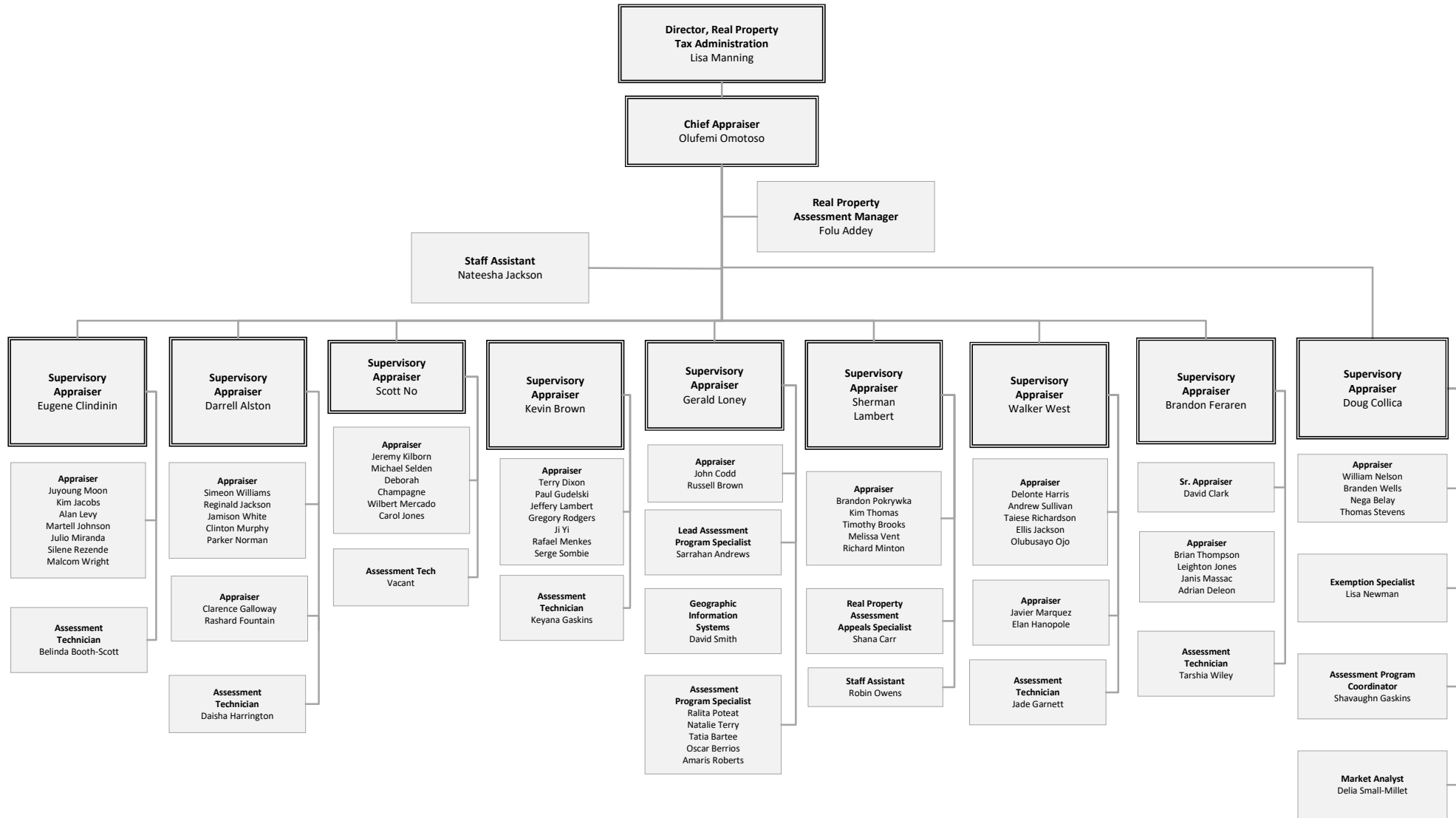


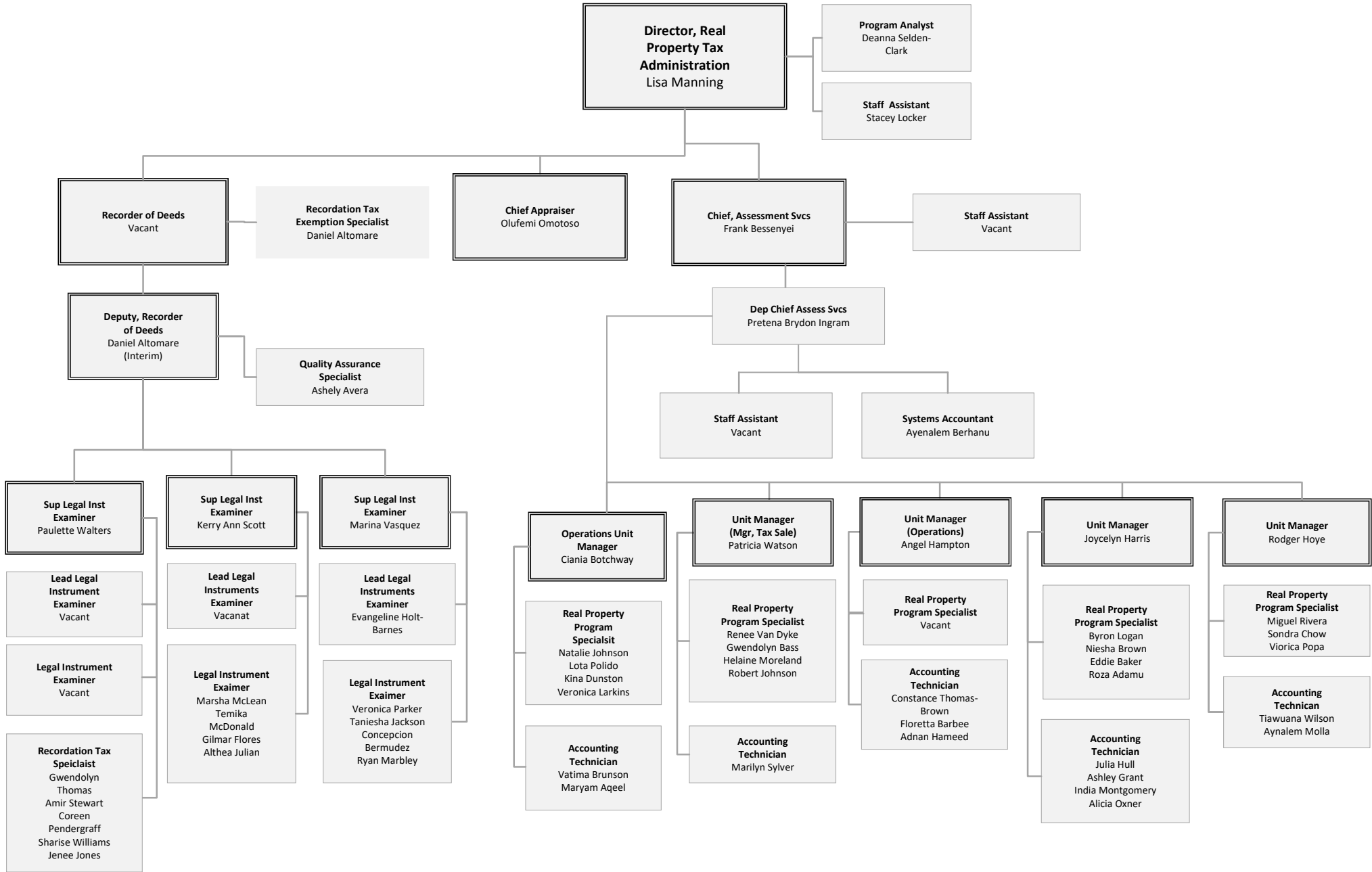


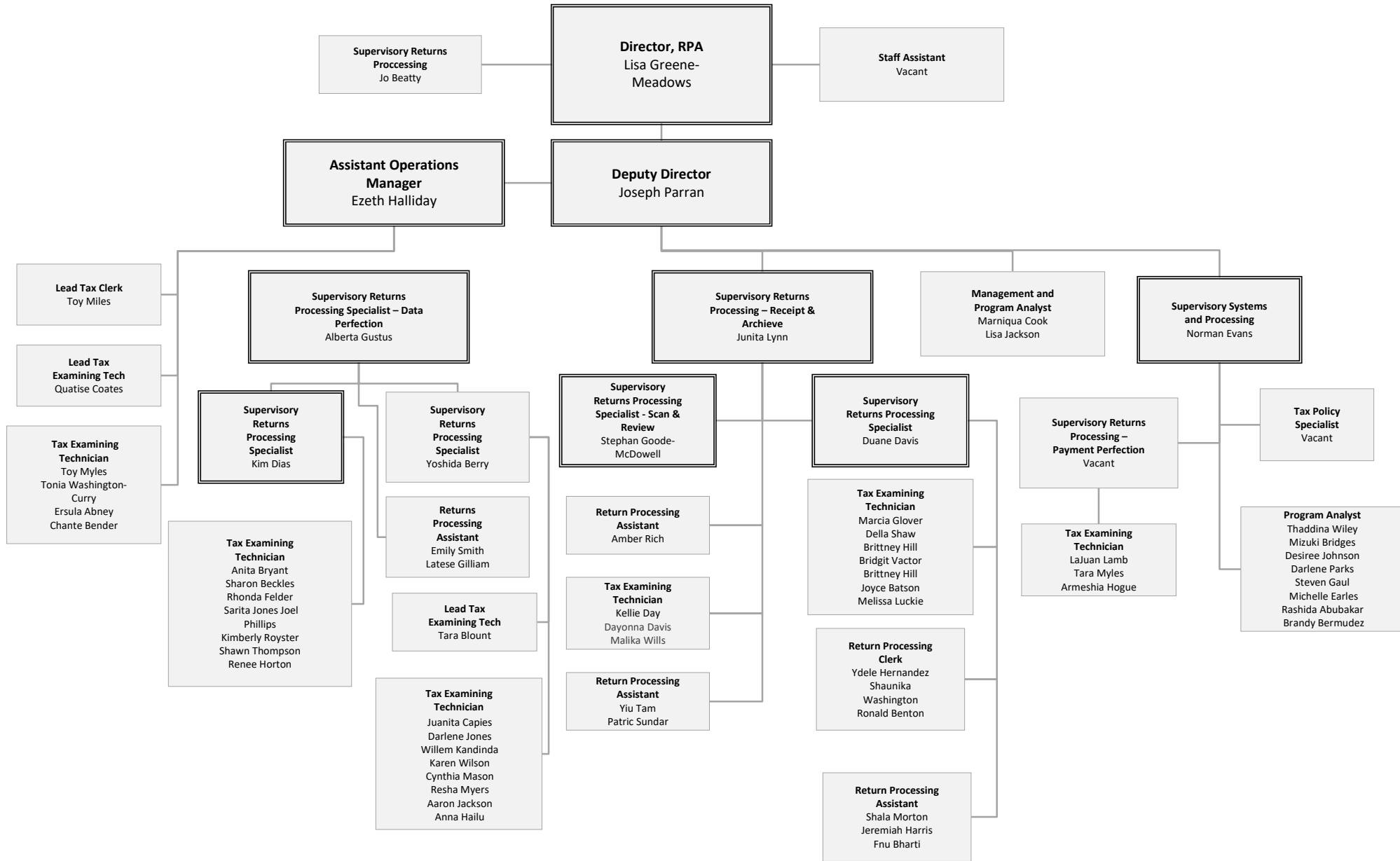












Project Manager - Senior	Filled	10/1/25	No	N/A	OST, Inc.
Quality Analyst Coordinator	Filled	10/1/25	No	N/A	OST, Inc.
Service Desk Technician - Senior	Filled	10/1/25	No	N/A	OST, Inc.
Service Desk Technician - Senior	Filled	10/1/25	No	N/A	OST, Inc.
Service Desk Technician - Senior	Filled	10/1/25	No	N/A	OST, Inc.
Service Desk Technician - Journeyman	Filled	10/1/25	No	N/A	OST, Inc.
Service Desk Technician - Journeyman	Filled	10/1/25	No	N/A	OST, Inc.
Service Desk Technician - Journeyman	Filled	10/1/25	No	N/A	OST, Inc.
Service Desk Technician - Journeyman	Filled	10/1/25	No	N/A	OST, Inc.
SharePoint Developer	Filled	10/1/25	No	N/A	OST, Inc.
Technical Writer	Filled	10/1/25	No	N/A	OST, Inc.
Technical Writer	Filled	10/1/25	No	N/A	OST, Inc.
Test Automation Engineer Lead	Filled	10/1/25	No	N/A	OST, Inc.
Test Engineer/ QA Analyst - Master	Filled	10/1/25	No	N/A	OST, Inc.
Treasury Analyst	Filled	10/1/25	No	N/A	OST, Inc.
Virtual Desktop Infrastructure Engineer	Filled	10/1/25	No	N/A	OST, Inc.
Voice and Data Communications Engineer	Filled	10/1/25	No	N/A	OST, Inc.
Voice and Data Communications Engineer	Filled	10/1/25	No	N/A	OST, Inc.
Test Automation Engineer Lead	Filled	10/14/25	No	N/A	OST, Inc.
Test Automation Engineer Lead	Filled	10/20/25	No	N/A	OST, Inc.
Information Assurance and Security Specialist -	Filled	11/1/25	No	N/A	OST, Inc.
Information Assurance and Security Specialist -	Filled	11/1/25	No	N/A	OST, Inc.
Information Assurance and Security Specialist -	Filled	11/1/25	No	N/A	OST, Inc.
IT Security Engineer	Filled	11/1/25	No	N/A	OST, Inc.
IT Security Engineer	Filled	11/16/25	No	N/A	OST, Inc.
IT Security Engineer	Filled	11/16/25	No	N/A	OST, Inc.
Information Assurance and Security Specialist -	Filled	12/1/25	No	N/A	OST, Inc.
Oracle Cloud ERP Functional Specialist	Filled	12/1/25	No	N/A	OST, Inc.
Service Desk Technician - Senior	Filled	12/1/25	No	N/A	OST, Inc.
.NET Developer - Senior	Filled	12/22/25	No	N/A	OST, Inc.
Project Manager - Master	Filled	1/5/26	No	N/A	OST, Inc.
AWS Connect Specialist	Vacant	TBD	No	N/A	OST, Inc.
Computer Operator	Vacant	TBD	No	N/A	OST, Inc.
F002 - Accounting Financial Manager	Vacant	TBD	No	N/A	OST, Inc.
IT Security Engineer	Vacant	TBD	No	N/A	OST, Inc.
Network Security Engineer	Vacant	TBD	No	N/A	OST, Inc.
Oracle Cloud ERP Functional Specialist	Vacant	TBD	No	N/A	OST, Inc.
Oracle ERP Cloud Report Specialist	Vacant	TBD	No	N/A	OST, Inc.
Service Desk Technician - Senior	Vacant	TBD	No	N/A	OST, Inc.
Service Desk Technician - Journeyman	Vacant	TBD	No	N/A	OST, Inc.
Voice and Data Communications Engineer	Vacant	TBD	No	N/A	OST, Inc.

Daily Porter Sanitation Services

Filled

10/1/2025

No

N/A

The Coles Group, LLC

**g. The contracted
annual cost.**

\$245,694.96
\$245,694.96
\$64,080.72
\$181,154.88
\$191,908.08
\$270,228.96
\$249,181.92
\$250,518.24
\$237,489.12
\$230,619.60
\$219,240.00
\$239,472.72
\$250,518.24
\$239,472.72
\$250,560.00
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\$106,007.76
\$69,593.04
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\$212,621.04
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\$151,860.24

\$328,400.64

\$328,400.64

\$367,634.16

\$383,356.80

\$383,356.80

\$332,994.24

\$323,786.16

\$332,994.24

\$332,994.24

\$332,994.24

\$317,417.76

\$332,994.24

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\$332,994.24

\$332,994.24

\$332,994.24

\$304,221.60

\$304,221.60

\$304,221.60

\$304,221.60

\$284,093.28

\$284,093.28

\$284,093.28

\$333,015.12

\$295,347.60

\$333,015.12

\$276,597.36

\$187,920.00

\$276,597.36

\$309,420.72

\$309,420.72

\$309,420.72

\$309,420.72

\$309,420.72

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\$309,420.72

\$309,420.72

\$309,420.72

\$268,161.84

\$256,782.24

\$268,161.84

\$213,811.20
\$119,934.72
\$132,942.96
\$132,942.96
\$132,942.96
\$94,043.52
\$83,520.00
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\$83,520.00
\$184,474.80
\$165,265.20
\$165,265.20
\$147,809.52
\$160,316.64
\$124,486.56
\$304,117.20
\$140,668.56
\$140,668.56
\$142,712.64
\$136,935.68
\$253,117.76
\$253,117.76
\$253,117.76
\$304,640.00
\$291,840.00
\$291,840.00
\$231,847.36
\$236,416.64
\$111,040.48
\$136,480.96
\$198,295.92
\$188,358.24
\$74,327.28
\$173,132.64
\$212,280.00
\$106,476.72
\$198,459.84
\$199,191.84
\$93,212.88
\$65,938.56
\$98,629.68

\$80,912.00

MASTER AGREEMENT

BETWEEN

**THE AMERICAN FEDERATION OF STATE,
COUNTY AND MUNICIPAL EMPLOYEES,
DISTRICT COUNCIL 20,
AFL-CIO**

AND

**THE GOVERNMENT OF THE
DISTRICT OF COLUMBIA**

EFFECTIVE THROUGH SEPTEMBER 30, 2010

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PREAMBLE

The District of Columbia Comprehensive Merit Personnel Act (D.C. Law 2-139, Title I, Chapter 6, Subchapter 1, D.C. Official Code § 1-601.02) states that the Council of the District of Columbia declares that it is the purpose and policy of this act to assure that the District of Columbia Government shall have a modern flexible system of public personnel administration, which shall "provide for a positive policy of labor-management relations including collective bargaining between the District of Columbia and its employees"

The District of Columbia Comprehensive Merit Personnel Act (D.C. Law 2-139, Title 1, Chapter 6, Subchapter XVIII, (D.C. Official Code) Section 1-617.01) states [t]he District of Columbia Government finds and declares that an effective collective bargaining process is in the general public interest and will improve the morale of public employees and the quality of service to the public.

The District of Columbia Comprehensive Merit Personnel Act (D.C. Law 2-139, Title 1, Chapter 6, Subchapter XVIII, (D.C. Official Code) Section 1-617.01(b) provides for collective bargaining between the Mayor of the District of Columbia and labor organizations accorded exclusive recognition for employee representation for employees of the District of Columbia Government..

Pursuant to the District of Columbia Comprehensive Merit Personnel Act (D.C. Law 2-139, Title 1, Chapter 6, Subchapter XVIII, (D.C. Official Code) Section 1-617.10), various local unions or District Council 20 of the American Federation of State, County and Municipal Employees, AFL-CIO, (herein "AFSCME" or the "Union") have been certified and/or recognized as the exclusive collective bargaining agent for employees of the District of Columbia Government (hereinafter the "District" or the "Employer").

Accordingly, AFSCME and the District enter into this Agreement, which shall have as its purposes:

- (1) Promotion of a positive policy of labor-management relations between the District of Columbia Government and its employees;
- (2) Improvement of morale of employees in service to the District of Columbia Government;
- (3) Enhancement of the quality of public service to the citizens of the District of Columbia;
- (4) Creation of a government that works better; and
- (5) Promotion of the rights of District of Columbia Government employees to express their views without fear of retaliation.

AFSCME and the District of Columbia Government declare that each party has been afforded the opportunity to put forth all its non-compensation proposals and to bargain in good faith. Both parties agree that this Agreement is the result of their collective bargaining and each party affirms its contents without reservation. This Preamble is intended to provide the background and purpose of the Collective Bargaining Agreement. Alleged violations of the Preamble per se will not be cited as contract violations.

ARTICLE 1 **RECOGNITION**

Section 1 – Recognition:

The District of Columbia Government (hereinafter referred to as the “District” or “Employer”) hereby recognizes as the sole and exclusive representative for the purpose of collective bargaining, the American Federation of State, County and Municipal Employees, AFL-CIO, District of Columbia District Council 20, and its affiliated Local Unions (hereinafter referred to collectively as the “Union” or “AFSCME”) for each of the bargaining units under the personnel authority of the Mayor for which AFSCME is the certified collective bargaining representative.

Section 2 - Bargaining Units Descriptions:

This Agreement may also include agencies with independent personnel authority if they have executed an addendum opting to be covered by the provisions herein.

Section 3 - Coverage:

AFSCME, the certified exclusive representative of all employees in the bargaining unit referenced above, shall be responsible for representing the interests of employees in the units without discrimination as to membership; provided, however, that an employee who does not pay dues or service fees may be required by the Union to pay reasonable costs for personal representation.

Section 4 – New Units:

Bargaining units of employees under the administrative jurisdiction of the Mayor of the District of Columbia certified during the term of this Agreement shall be covered by the provisions of this Agreement, if agreed to by the parties.

Section 5 – Unit Clarification(s):

The Union and the Employer shall file a Joint Petition with the Public Employee Relations Board (hereinafter referenced as PERB) to clarify and correct inaccuracies contained on the current unit certifications. Prior to filing of the joint petition, the Union and Employer shall confer on the revised unit descriptions.

ARTICLE 2
MANAGEMENT RIGHTS

Section 1 – Management Rights in Accordance with the Comprehensive Merit Personnel Act (CMPA):

(a) Management's rights shall be administered consistent with D.C. Official Code §1-617.08, 2001 edition as amended.

(b) All matters shall be deemed negotiable except those that are proscribed by this subchapter. Negotiations concerning compensation are authorized to the extent provided in Sections 1-617.16 and 1-617.17.

Section 2 - Impact of the Exercise of Management Rights:

Management rights are not subject to negotiations; however, in the Employer's exercise of such rights, the Union may request the opportunity to bargain the impact and effects, where there has been an adverse impact upon employees regarding terms and conditions of employment.

ARTICLE 3
UNION RIGHTS AND SECURITY

Section 1 – Exclusive Agent:

The District shall not negotiate with any other employee organization or group with reference to terms and/or conditions of employment for employees represented by AFSCME. AFSCME shall have the right of unchallenged representation in its bargaining units for the duration of this Agreement in accordance with PERB Interim Rules, Section 502.9(b).

Section 2 – Meeting Space:

Upon request at least one day in advance, the Employer will provide meeting space as available for bargaining unit business. Except as provided elsewhere in this Agreement, meetings will be held on the non-work time of all employees attending the meetings. The Union will be responsible for maintaining decorum at meetings on the Employer's premises and for restoring the space to the same condition to which it existed prior to the meetings.

Section 3 – Access to Employees:

The Union shall have access to all new and rehired employees to explain Union membership, services and programs. Such access shall occur during either a formal orientation session or upon

such employees' reporting to their work site within thirty (30) calendar days of employees' appointment or reappointment.

Section 4 - Dues Checkoff:

The Employer agrees to deduct union dues bi-weekly from the pay of employee members upon proper authorization. The employee must complete and sign Form 277 to authorize the withholding. The amount to be deducted shall be certified to the Employer in writing by the appropriate official of District Council 20. It is the responsibility of the employee and the Union to bring errors or changes in status to the attention of the Employer. Corrections or changes will be made at the earliest opportunity after notification is received but in no case will changes be made retroactively. Union dues withholding authorization may be cancelled upon written notification to the Union and the Employer within the thirty (30) calendar day period prior to the anniversary date of this Agreement. When Union dues are cancelled, the Employer shall withhold a service fee in accordance with Section 5 of this Article.

Section 5 - Service Fees:

In keeping with the principle that employees who benefit by the Agreement should share in the cost of its administration, the Union shall require that employees who do not pay Union dues shall pay an amount (not to exceed Union dues) that represents the cost of negotiation and/or representation. Such deductions shall be allowed when the Union presents evidence that at least 51% of the employees in the unit are members of the Union.

Section 6 - Cost of Processing:

The Employer shall deduct \$.05 per deduction (dues or service fee) per pay period from each employee who has dues or service fees deducted. This amount represents the fair value of the cost to the Employer for performing the administrative services and is payable to the Office of Labor Relations and Collective Bargaining.

Section 7 - Hold Harmless:

The Union shall indemnify, defend and hold the Employer harmless against any and all claims, demands and other forms of liability, which may arise from the operation of this Article. In any case in which a judgment is entered against the Employer as a result of the deduction of dues or other fees, the amount held to be improperly deducted from an employee's pay and actually transferred to the Union by the Employer, shall be returned to the Employer or conveyed by the Union to the employee(s), as appropriate.

ARTICLE 4
LABOR-MANAGEMENT MEETINGS

Section 1 – Labor-Management Partnerships:

Consistent with the principles of the D.C. Labor-Management Partnership Council, the parties agree to establish and support appropriate partnerships within the individual agencies covered by this Agreement. The purpose of such partnership will be to promote labor-management cooperation within a high-quality work environment designed to improve the quality of services delivered to the public.

Agency partnership should ordinarily be made up of equal numbers of high-level officials of labor and management who will meet regularly to consider such issues as they choose to discuss. Decisions by the partnership are by consensus only.

Section 2 – Labor-Management Contract Review Committee:

Appropriate high-level management and union representatives shall meet at least monthly, at either party's request, to discuss problems covering the implementation of this Agreement. The findings and recommendations of the Contract Review Committee will be referred to the Director for action. The Director or his/her designee shall respond in writing to any written finding and recommendation of the committee within a reasonable period.

ARTICLE 5
DISCRIMINATION

Section 1 – General Provisions:

The Employer agrees that it will not in any way discriminate against any employee because of his/her membership or affiliation in or with the Union or service in any capacity on behalf of the Union. Each employee of the District Government has the right, freely and without fear of penalty or reprisal:

- (1) To form, join and assist a labor organization or to refrain from this activity;
- (2) To engage in collective bargaining concerning terms and conditions of employment, as may be appropriate under this law and rules and regulations through a duly designated majority representative; and,
- (3) To be protected in the exercise of these rights.

Neither party to this Agreement will discriminate against any employee with regard to race, color, religion, national origin, sex, age, marital status, personal appearance, sexual orientation, family responsibilities, matriculation, physical handicap, political affiliation, or as otherwise provided by law.

Section 2 – Equal Employment Practices:

The Employer agrees to vigorously continue the implementation of its Equal Employment opportunity Program as approved by the Director, D.C. Office of Human Rights. For the purpose of this Agreement, the Department/Agency's Affirmative Action Plan will be observed. Progress reports will be sent to the Union periodically as to the implementation of the Affirmative Action Plan.

The Union shall designate an Affirmative Action Coordinator who shall, upon request, attend meetings of the Department's Affirmative Action Counselors, and be permitted to meet with Department EEO officials to discuss implementation of the Affirmative Action Plan including Departmental policies and programs.

Vacancy Announcements for Departmental vacancies shall be posted at all work locations. One copy of the notice shall be supplied to appropriate Union Shop Stewards.

Section 3 – Discrimination Charges:

Any charges of discrimination shall be considered by the appropriate administrative agency having jurisdiction over the matter and shall therefore not be subject to the negotiated grievance procedure.

ARTICLE 6
UNION RIGHTS AND RESPONSIBILITIES

Section 1 – Union Stewards:

Union Stewards shall be designated by the Union and shall be recognized as employee representatives. Union Stewards shall be employed at the same work area or shift as employees they are designated to represent. When a union steward is transferred by an action of management (not including promotion or transfer at the employee's request), the steward may continue to act as a steward for his/her former work site for a period not to exceed 45 days from original notification. The Union will supply the Employer with lists of stewards' names, which shall be posted on appropriate bulletin boards. The Union shall notify the Employer of changes in the roster of Stewards. Stewards are authorized to perform and discharge union duties and responsibilities, which may be assigned to them under the terms of this Agreement.

Section 2 – Performance of Duties:

Stewards shall obtain permission from their immediate supervisors prior to leaving their work assignments to properly and expeditiously carry out their duties during a reasonable amount of official time to be estimated in advance whenever possible. Before attempting to see an employee, the Steward will obtain permission from the employee's supervisor. Such permission will be granted unless the employee cannot be immediately relieved from his assigned duties, in which case permission will be granted as soon as possible thereafter. If the immediate supervisor is unavailable, permission will be requested from the next highest level of supervision. Requests by Stewards for permission to meet with employees and/or by employees to meet with Stewards will not require prior explanation to the supervisor of the problems involved other than to identify the area to be visited and the general purpose of the visit i.e., grievance investigation, labor-management meetings, negotiation sessions, etc.

A Steward thus engaged will report back to his/her supervisor on completion of such duties and return to their job. The employer agrees that there shall be no restraint, interference, coercion, or discrimination against a Steward in the performance of such duties.

Section 3 – Union Activities on Employer's Time and Premises:

The Employer agrees that during working hours, on the Employer's premises and without loss of pay, in accordance with Article 6 of this Agreement, Union representatives shall be allowed to:

- A. Post Union notices on designated Union bulletin boards (with a copy given to the Employer);
- B. Attend negotiation meetings;
- C. Transmit communications authorized by the District Council and Local Union or its officers to the Employer or his/her representative;
- D. Consult with the Employer or his/her representative, District Council and Local Union Officers, other Union representatives or employers, concerning the enforcement of any provisions of this Agreement, and other Labor-Management activities. Official time does not include internal Union activities; and
- E. Solicitation of Union membership and distribution of literature shall be confined to the non-working time of all employees involved and out of sight of the public.

Section 4 – Visits by Union Representatives:

The Employer agrees that representatives of the American Federation of State, County and Municipal Employees whether local, Union representatives, District council representatives, or

International representatives shall have full and free access except in secured areas, to the premises of the Employer at any time during working hours to conduct Union business. Advance notification will be given to the appropriate supervisor of the facility to be visited to permit scheduling that will cause minimal disruption of the work activities.

Section 5 – Union Insignia:

The Employer agrees that the employee has a right to participate and identify with the Union as his/her representative in collective bargaining matters; therefore, the Employer agrees that such identification devices as emblems, buttons and pins supplied by the Union to the employees within the bargaining unit may be worn on their uniforms, except for uniformed police.

Section 6 – Official Time:

Union representatives who engage in labor management activities during working hours shall indicate on the "Official Time Report" the activity performed. No Union representative will be disadvantaged in the assessment of his/her performance based on use of documented official time while conducting labor management business.

REPRESENTATIONAL FUNCTIONS OF OFFICIAL TIME (Activity)

1	Labor negotiations.
2	Contacts between employee representatives and employees provided for in the negotiated grievance procedure.
3	Grievance meetings and arbitration hearings.
4	Disciplinary or adverse action meetings, if the Union is designated as representative of the employee.
5	Attendance at an examination of an employee who reasonably believe he or she may be the subject of a disciplinary or adverse action and the employee has requested representation.
6	Attendance at board or other committee meetings on which the Union representatives are authorized membership by the Employer or the Agreement.
7	Attendance at meetings between the Employer and the Union.
8	Attendance at agency recognized/sponsored activities to which the Union has been invited.

Distribution: Original to Office of Labor Relations & Collective Bargaining
 Copy kept by Supervisor & Union Representative

ARTICLE 7
DISCIPLINE

Section 1:

Discipline shall be imposed for cause, as provided in the D.C. Official Code § 1-616.51 (2001 ed.).

Section 2:

For the purposes of this Article, discipline shall include the following:

- a. **Corrective Actions:** Written reprimands or suspensions of nine (9) days or less;
- b. **Adverse Actions:** Removal, suspension for more than nine (9) days; or a reduction in rank or grade or pay for cause.

Section 3:

Discipline will be appropriate to the circumstances, and shall be primarily corrective, rather than punitive in nature. After discovery of the incident, the investigations shall be conducted in a timely manner and discipline shall be imposed upon the conclusion of any investigation or the gathering of any required documents, consistent with the principle of progressive discipline and D.C. Office of Personnel regulations.

Section 4:

If a supervisor has reason to discipline an employee, it shall be done in a manner that will not embarrass the employee before other employees or the public.

Section 5:

Unless there is a reasonable cause to believe that an employee's conduct is an immediate hazard to the agency, the employee or other employees, or is detrimental to public health, safety or welfare, an employee against whom adverse action is proposed shall be entitled to at least thirty (30) days advance written notice of proposed adverse action (or fifteen (15) days if corrective action is proposed). The notice will identify the causes and the reasons for the proposed action.

Section 6:

Recognizing that the Union is the exclusive representative of the employees in the bargaining unit, the Department shall in good faith attempt to notify the Union of proposed disciplinary actions. Each Department shall notify the union of the method of notification. Further the Employer agrees

to notify the employee of his or her right to representation in corrective or adverse actions. The material upon which the proposed discipline is based shall be made available to the employee and his/her authorized representatives for review. The employee or his/her authorized representative will be entitled to receive a copy of the material upon written request.

Any information that cannot be disclosed to the employee, his representative, or physician shall not be used to support the proposed action.

Section 7:

Except in the special circumstances referred to in Section 5 above, an employee shall be entitled to at least ten (10) workdays to answer the notice of proposed corrective or adverse action. If the proposed action is removal, the employee shall upon request, be granted an opportunity to be heard prior to a final decision. This opportunity to be heard shall be afforded by a person designated by the agency head. This person shall not be in the supervisory chain between the proposing and/or deciding official(s) and shall not be subordinate to the proposing official. This person shall review the employee's answer, discuss the proposed action with the employee and/or his representative and appropriate representatives of the Employer and make a recommendation to the deciding official who will act upon the recommendation, as he/she deems proper.

Section 8:

The person proposing a disciplinary action shall not be the deciding official unless the proposing official is the agency head or Director of Personnel.

Section 9:

Except in the special circumstances referred to in Section 5 above, an employee against whom a corrective or adverse action has been proposed shall be kept in an active duty status during the notice period.

Section 10:

The deciding official shall issue a written decision within forty-five (45) calendar days from the date of receipt of the notice of proposed action which shall withdraw the notice of proposed action or sustain the proposed action in whole or in part. The forty-five (45) day period for issuing a final decision may be extended by agreement of the employee and the deciding official. If the proposed action is sustained in whole or in part, the written decision shall identify which causes have been sustained and which have been dismissed, describe whether the proposal penalty has been sustained or reduced and inform the employee of his or her right to appeal or grieve the decision, and the right to be represented. The final decision shall also specify the effective date of this action.

Section 11:

In any circumstance in which the Employer has reasonable cause to believe that an employee's conduct is an immediate hazard to the employing agency, to the employee involved or other employees, or is detrimental to public health, safety or welfare the Employer may place an employee on administrative leave whether or not notice of proposed action has been given to the employee.

Section 12:

Notice of final decision, dated and signed by the deciding official, shall be delivered to the employee on or before the time the action is effective. If the employee is not in a duty status at that time, the notice shall be sent to the employee's last known address by certified or registered mail.

Section 13:

Except as provided in Section 14 of this Article, employees may grieve actions through the negotiated grievance procedure, or appeal to the office of Employee Appeals (OEA) in accordance with OEA regulations but not both. Once the employee has selected the review procedure, that choice shall be the exclusive method of review.

Section 14:

The removal of an employee during his or her probationary period is neither grievable nor appealable and shall be done in accordance with the DPM.

Section 15:

If a final decision is grieved through the negotiated grievance procedure a written grievance shall be filed with the deciding official within fifteen (15) workdays after the effective date of the action.

Section 16 – Troubled Employees:

In appropriate cases, consideration shall be given to correcting the problem through the D.C. Consultation and Counseling Service. When the District implements a new employee assistance program, this shall take the place of the D.C. Consultation and Counseling Service.

Section 17:

Whenever an employee is questioned by a supervisor with respect to a matter for which a disciplinary action is intended against the employee, the employee may, upon request, consult with a union official or other representative. Upon such request, the supervisor will stop the questioning until the employee can consult with such representative, but in no event will such questioning be

delayed beyond the end of the employee's following shift. When and if questioning is resumed, an employee may have a union official or other representative present.

ARTICLE 8
TRAINING AND CAREER LADDER

Section 1 – Basic Training:

Other than skills necessary to qualify for the position, the Employer agrees to provide each employee with basic training or orientation for the safe and effective performance of his/her job. Such training shall be provided at the Employer's expense and, if possible, during the employee's regular workday. If the employee is required to participate in training outside of regular work hours, the employee will be compensated in accordance with the Compensation Units 1 and 2 Agreement. Continued training shall be within budgetary constraints.

Section 2 - Continued Training Opportunities:

The Employer will encourage and assist employees in obtaining career related training and education outside the Department by collecting and posting current information available on training and educational opportunities. The Employer will inform employees of time or expense assistance the Employer may be able to provide.

Section 3 - Career Ladder:

The parties recognize and endorse the value of employee training and career ladder programs. Both parties subscribe to the principles of providing career development opportunities for employees who demonstrate potential for advancement. The feasibility of upward mobility and training programs for unit employees shall be a proper subject for labor-management meetings. Career ladder promotions when effected, shall be in accordance with DPM Chapter 8, Part II, Subpart 8, and Appendix A.

Section 4 - Experience Verification:

When an institution of higher learning provides credit for on-the-job experience, the Employer will, at the request of the employee, provide pertinent information to verify the employee's experience with the District. The employee shall provide the relevant documents and information necessary for the release of the employee's information to the relevant institution.

Section 5 - Union Sponsored Career Advancement Programs:

Management and the Union support the objective of meaningful career advancement for District Government workers in the areas of promotion, transfers and filling of vacancies. In keeping with this objective, the Union will investigate and develop programs to enhance opportunities for

career advancement such as: career counseling services; placement of career planning resource materials on site; correspondence course arrangements with area colleges, universities, vocational and technical schools; and workshops on resume writing and interview skills.

Programs that are developed will be presented and discussed during appropriate labor-management committee meetings for review and consideration.

ARTICLE 9 **SAFETY AND HEALTH**

Section 1 - Working Conditions:

A. The District shall provide and maintain safe and healthful working conditions for all employees as required by applicable laws. It is understood that the District may exceed standards established by regulations consistent with the objectives set by law. The Employer will make every effort to provide and maintain safe working conditions. AFSCME will cooperate in these efforts by encouraging its members to work in a safe manner and to obey established safety practices and regulations.

B. Matters involving safety and health will be governed by the D.C. Occupational Safety and Health Plan in accordance with Subchapter XXI of the Comprehensive Merit Personnel Act (1980, as amended). The District will promptly make every effort to qualify its plan under the Occupational Safety and Health Administration (OSHA) as established by the U.S. Department of Labor.

C. The District shall furnish and maintain each work place in accordance with standards provided within this Section.

Section 2 - Employees Working Alone:

Employees shall not be required to work alone in areas beyond the call, observation or periodic check of others where dangerous chemicals, explosives, toxic gases, radiation, laser light, high voltage or rotary machinery are to be handled, or in known dangerous situations whenever the health and safety of an employee would be endangered by working alone.

Section 3 - Corrective Actions:

A. If an employee observes a condition, which he or she, believes to be unsafe, the employee should report the condition to the immediate supervisor.

B. If the supervisor and employee agree that a condition constitutes an immediate hazard to the health and safety of the employee, the supervisor shall take immediate precautions to protect the employee.

C. If the supervisor and employee do not agree that a condition constitutes an immediate hazard to the health and safety of the employee, the matter may be immediately referred by the employee to the next level supervisor or designee. The supervisor or designee shall meet as soon as possible with the employee and his or her AFSCME representative, and shall make a determination.

D. Employees shall not be required to operate equipment that has been determined by the Employer or the appropriate D.C. Safety Officer to be unsafe to use, when by doing so they might injure themselves or others.

Section 4 - Medical Service: On-the-Job Injury:

A. The District shall make first-aid kits reasonably available for use in case of on-the-job injuries. If additional treatment appears to be necessary, the District shall arrange immediately for transportation to an appropriate medical facility.

B. The need for additional first-aid kits will be an appropriate issue for Safety Committee determination. Recommendations of the Safety Committee will be referred to the appropriate agency officials.

Section 5 - Safety Devices and Equipment:

Protective devices and protective equipment shall be provided by the District and shall be used by the employees.

Section 6 - Safety Training:

A. The District shall provide safety training to employees as necessary for performance of their job. Issues involving safety training may be presented to the Safety Committee established in Section 8(A).

B. The District shall provide CPR training to all employees who request such training.

Section 7 - Information on Toxic Substances:

Employees who have been identified by the Safety Committee and the Department or District Safety Officer as having been exposed to a toxic substance (including, but not limited to asbestos) in sufficient quantity or duration to meet District Government standards shall receive appropriate health screening. In the absence of District Government standards, the Safety Committee and Safety Officer will refer to standards established by other appropriate authorities such as Occupational Safety and Health Administration (OSHA), National Institute for Occupational Safety and Health (NIOSH) or the Environmental Protection Agency (EPA).

Section 8 - Safety Committees:

A. A Safety Committee of three (3) representatives from AFSCME and three (3) representatives from the District is hereby established in each department/agency.

B. One (1) AFSCME and one (1) District representative shall each serve as co-chairpersons of the Committee. The Agency's Risk Management official shall serve on the Safety Committee as one of the Agency's representative.

C. The Safety Committee shall:

1. Meet on a monthly basis, unless mutually agreed otherwise. Prior to regularly scheduled monthly meeting, labor and management must submit their respective agendas to each other at least five (5) days in advance;

2. Conduct safety surveys, consider training needs, and make recommendations to the agency/department head and the Office of Risk Management;

3. Receive appropriate health and safety training.

D. Final reports or responses from agency/department heads (or designees) shall be provided to the Safety Committee within a reasonable period of time on safety matters initiated by the Committee.

E. In departments/agencies where there is more than one Local Union, there shall be a safety committee for each Local Union, unless otherwise agreed upon.

F. Safety Committees may be reorganized upon agreement of both parties.

Section 9 - Medical Qualification Requirements:

The District agrees to abide by the provisions of Chapter 8, Sections 848.19 and 848.20 of the D.C. Personnel Regulations as published in the D.C. Register, Volume 32, April 5, 1985 (32 DCR 1858, 1911).

Section 10 - Light Duty:

A. The District agrees to provide light duty assignments for Employees injured on the job to the extent that such light duty is available as follows:

1. To be eligible for light duty, the employee must be certified by the employee's attending physician. The certification must identify the employee's impairments and the type of light duty he or she is capable of performing.

2. The Employee will be given light duty assignments for which he or she is qualified, initially within his or her own Bureau or organizational unit. If light duty is not available within the Bureau or organizational unit, suitable work will be sought elsewhere in the department/agency.

3. Light duty assignments shall not normally extend beyond 45 working days. However, if there are no other requests for light duty, this period may be extended until such time as the request is made by another employee. Employees unable to perform their regularly assigned duties after the expiration of that time shall make application for disability compensation or exercise such other options as may be available to employees under the provisions of this Agreement or under law, and in accordance with paragraph 5 below.

4. Where there are more requests for light duty than there are light duty assignments, assignments shall be made in the order of earlier date of request.

5. When light duty is not available, an employee must return to full duty or seek compensation or retirement from appropriate channels, or other assistance as may be available in accordance with Section 9. In the event compensation or retirement is not approved, the employee may be required to take a fitness for duty examination and may be separated if (a) found unfit to perform or (b) found fit but refuses to report for full duty.

Section 11 - Excessive Temperatures in Buildings:

Employees, other than those determined by the Employer to be essential, shall be released from duty or reassigned to other duties of a similar nature at a suitably temperate site because of excessively hot or cold conditions in the building. This determination will be made by the Employer as expeditiously as possible and shall be based upon existing procedures. In lieu of dismissal, the Employer may reassign employees to other duties of similar nature at a suitably temperate site. The cost of authorized transportation will be assumed by the Employer. Administrative leave will be granted if authorized by the Mayor or his or her designee.

Section 12 - Employee Health Services:

Employees covered by this Agreement shall have access to employee health services provided by the Employer consistent with the Comprehensive Merit Personnel Act (D.C. Law 2-139). Employee health services shall include such services as provisions for emergency diagnosis and emergency treatment of illness, physical examination including, but not limited to, pre-employment, fitness for duty or disability retirement evaluation; treatment of minor illness; preventive services; health information to assist employees to protect, conserve, and improve physical and mental health; and counseling and appropriate referrals to the D.C. Consultation and Counseling Service.

Section 13 - Maintenance of Health Records:

Medical records of employees shall be maintained in accordance with the provisions of Chapter 31 of the D.C. Government regulations that maintain confidentiality of those records. Medical records shall not be disclosed to anyone except in compliance with applicable rules relating to disclosure of information. Copies of rules relating to medical information will be made available to AFSCME.

Section 14:

A. The Employer agrees to follow Mayor's order 87-95 regarding ergonomic policy for use of video display terminals.

B. VDT continuous users who operate a VDT for more than two continuous hours shall be allowed to move out of their chairs for brief periods to perform other tasks as specified by their supervisor.

C. If a pregnant employee, who is a continuous VDT user, submits a medical statement from her physician which recommends limiting her use of the VDT during the term of her pregnancy because of exposure to radiation, reasonable consideration will be given to providing the employee with other available duties, within the work unit, for which she is qualified and which her doctor certifies that she can perform.

Section 15:

The Employer agrees to provide the Union with a copy of all current D.C. Safety Officers, and revisions as they occur.

**ARTICLE 10
GENERAL PROVISIONS**

Section 1 - Work Rules:

Employees will be advised of verbal and written work rules, which they are required to follow. The Employer agrees that proposed new written work rules and the revision of existing written work rules shall be subject to notice and consultation with the Union.

Section 2 - Distribution of Agreement:

The Employer and the Union agree to share equally in the cost of reproducing this contract for employees and supervisors. The parties shall mutually agree upon the cost and number of copies to be printed.

ARTICLE 11
BULLETIN BOARDS

The Employer agrees to furnish suitable Bulletin Boards and/or space to be placed at locations mutually acceptable to the Union and the Employer. The Union shall limit its posting of notices and bulletins to such Bulletin Boards.

ARTICLE 12
PERSONNEL FILES

Section 1 - Official Files:

The Employer shall maintain the official files of all personnel in all units covered by this Agreement in the Office of Personnel. Records of corrective actions or adverse actions shall be removed from an employee's official file in accordance with the DPM.

Section 2 - Right to Examine:

Each employee shall have the right to examine the contents of his/her personnel files upon request.

Section 3 - Right to Respond:

Each employee shall have the right to answer any material filed in his/her personnel file and his/her answer shall be attached to the material to which it relates.

Section 4 - Right to Copy:

An employee may copy any material in his/her personnel file.

Section 5 - Access by Union:

Upon presentation of written authorization by an employee, the Union representative may examine the employee's personnel file and make copies of the material.

Section 6 - Confidential Information:

The DC Office of Personnel shall keep all arrests by the Metropolitan Police, fingerprint records, and other confidential reports in a confidential file apart from the official personnel folder.

Section 7 - Employee to Receive Copies:

A. The employee shall receive a copy of all material placed in his/her folder in accordance with present personnel practices. Consistent with this Article when the Employer sends documents to be placed in an employee's personnel folder which could result in disciplinary action or non-routine documents which may adversely affect the employee, the employee shall be asked to acknowledge receipt of the document. The employee's signature does not imply agreement with the material but simply indicates he/she received a copy.

B. If an employee alleges that he/she was not asked to acknowledge receipt of material placed in his/her personnel folder as provided in this section the employee will be given the opportunity to respond to that document and the response will be included in the folder.

Section 8 - Access by Others:

The Employer shall inform the employee of all requests outside of the normal for information about him/her or from his/her personnel folder. The access card signed by all those who have requested and have been given access to the employee's file shall be available for review by the employee.

ARTICLE 13
SENIORITY

Section 1 - Definition:

Seniority means an employee's length of continuous service with the Employer from his/her date of hire for purposes of this Article only. Employees hired on the same day shall use alphabetical order of surname in determining seniority.

Section 2 - Breaks in Continuous Service:

An employee's continuous service shall be broken by voluntary resignation, discharge for cause or retirement. If an employee returns to his former, or a comparable, position within one year, the seniority he had at the time of his/her departure will be restored but he/she shall not accrue additional seniority during his/her period of absence.

Section 3 - Seniority Lists:

Each agency with employees covered by this Agreement shall provide the Union semi-annually with list of names of employees represented by the Union in that Agency. The list will be in seniority order as defined by Section 1 of this Article. Also, each agency will supply the Union semi-annually with lists of new hires in bargaining unit positions and with names of unit employees who have left the agency since the last seniority list.

Section 4 - Reassignments:

A reassignment requested by an employee to a position in the same classification within an agency/department may be effected by mutual agreement.

Section 5 - Promotions:

A. Whenever a job opening occurs, in any existing job classification or as the result of the development or establishment of a new job classification, a notice of such opening shall be posted on all bulletin boards for ten (10) working days prior to the closing date. A copy of the notices of job openings will be given to the appropriate Union Steward at the time of posting.

B. During this period, employees who wish to apply for the open position or job including employees on layoff may do so. The application shall be in writing, and it shall be submitted to the appropriate Personnel Office.

C. Management has the right to determine job qualifications, provided they are limited to those factors' directly required to satisfactorily perform his/her job. Where all job factors are relatively equal, the employee with the greatest departmental seniority within the unit shall be promoted.

Section 6 - Change to Lower Grade:

A. The term "change to lower grade", as used in this provision means change of assignment from a position in one job classification to a lower paying position in the same job classification.

B. Demotions may be made to avoid laying off employees, to provide for employees who request a change to lower grade for personal convenience, or to change an employee to a lower grade when he/she is unable to perform satisfactorily the duties of his/her position.

Section 7 - Individual Work Schedules:

Work schedule changes initiated by the Employer affecting an individual employee shall be in accord with department/agency seniority, except where specific skills are needed.

Section 8 - Pay for Work Performed in Higher Graded Position:

A. Employees detailed or assigned to perform the duties of a higher graded position for more than four (4) pay periods in any calendar year shall receive the pay of the higher graded position. Assignment to a higher graded position for periods of at least one (1) pay period shall count toward the accumulation of the four (4) pay period requirement. The applicable rate of pay will be determined by application of D.C. government procedures concerning grade and step placement for

temporary promotions, and will be effective the first pay period beginning after the qualifying period has passed. An employee on detail to a lower graded position shall maintain the pay for his/her original position. Advance notice will be given to the Union of any detail exceeding one pay period.

B. This provision shall not apply to training programs.

C. Issues involving changed or additional duties assigned to an employee, within his/her present position, shall be considered in accordance with position classification procedures.

ARTICLE 14 INCLEMENT WEATHER CONDITIONS

Section 1 – Inclement Weather Work:

A. Any full-time employee who is scheduled to report for work and who presents himself for work as scheduled shall be assigned to at least eight (8) hours work.

B. If weather conditions do not permit the employee to perform his/her regularly scheduled duties and there is no other work available in line with his/her normal duties, the employee shall be given the option to perform other work or be paid at his/her regular rate for a minimum of four (4) hours and released from duty at his/her election on annual leave or leave without pay.

C. Employees working on snow detail or who are required to shovel snow shall be assigned in the following order:

1. Volunteers
2. In the inverse order of seniority

D. Employees with established health concerns may request to be exempt from snow shoveling assignments.

Section 2 - Reporting Time:

A. During inclement weather where the District Government has declared an emergency, employees (other than those designated emergency employees) will be given a reasonable amount of time to report for duty without charge to leave. Those employees required to remain on their post until relieved will be compensated at the appropriate overtime rate or compensatory leave for the time it takes his/her relief to report for duty.

B. The Employer agrees to dismiss all non-emergency employees when early dismissal is authorized by higher officials during inclement weather.

ARTICLE 15
HOURS OF WORK

Section 1 - Workday:

Except as provided in this Article, the normal workday for full-time employees shall consist of eight (8) hours of work within a 24-hour period. The normal hours of work shall be consecutive except that they may be interrupted by a lunch period.

Section 2 - Workweek:

Except as provided in this Article, the workweek for full-time employees shall normally consist of five (5) consecutive days, eight (8) hours of work, Monday through Friday, totaling forty (40) hours. Special schedules will be established for employees, other than employees in continuous operations, who are required to work on Saturday, Sunday or seasonal schedules as part of their regular workweek.

Section 3 - Continuous Operations and Shifts:

The workday for employees in 24-hour continuous operations shall consist of eight hours of work. Work schedules for employees assigned to shifts, showing the employee's workdays, and hours, shall be posted on appropriate bulletin boards. All employees shall be scheduled to work regular work shifts i.e., each work shift shall have a regular starting and quitting time.

Section 4 - Changes in Work Schedules:

Except in emergencies, regular work schedules shall not be changed without ten (10) working days advance notice.

Section 5 - Flexible/Alternative Work Schedules:

A. The normal work hours may be adjusted to allow for flexible/ alternative work schedules, with appropriate adjustments in affected leave and compensation items (e.g., overtime, premium pay, compensatory leave, etc.). Such schedules may be appropriate where (1) it is cost effective, (2) it increases employee morale and productivity, or (3) it better serves the needs of the public. The Union will be given advance notice (when flexible/alternative work schedules are proposed) and shall be given the opportunity to consult.

B. An alternative work schedule will provide that overtime compensation will not begin until the regularly scheduled workday or tour of duty has been completed. Other premiums will be based on the regularly scheduled workday of the employees. An alternative work schedule shall not affect the existing leave system. Leave will continue to be earned at the same number of hours per pay period as for employees on five (5) day, forty (40) hour schedules and will be changed on an hour-by-hour basis.

ARTICLE 16
ADMINISTRATION OF LEAVE

Section 1 – General:

Employees shall be eligible to use leave in accordance with the personnel rules and regulations. Any request for a leave of absence shall be submitted in writing by the employee to his/her immediate supervisor. The request shall state the length of time off the employee desires, the type of leave requested and the reason for the request. An excused absence is an absence from duty without loss of pay and without charge to leave when such absence is authorized by statute or administrative discretion.

Section 2 - Annual Leave:

A. Normal Requests for Leave: A request for a short leave of absence, not to exceed three days, shall be requested in writing on the proper form and answered before the end of the work shift in which the request is submitted. A request for a leave of absence between four to seven days must be submitted five (5) calendar days in advance and answered within five days, except for scheduled vacations, as provided for in Section 2 of this Article. If the request is disapproved, the supervisor shall return the SF-71 with reasons for the disapproval indicated. Requests for annual leave shall not be unreasonably denied.

B. Emergency Requests: Any employee's request for immediate leave due to family death or sickness shall be granted or denied immediately.

C. Carryover: Annual leave, which is not used, may be accumulated from year to year. In general, the maximum allowable leave is thirty (30) days, unless the employee had a greater amount of allowable leave at the beginning of the leave year. Employees shall receive a lump sum leave payment for all accrued annual leave not used at the time of retirement, resignation or other separation from the employer, consistent with the negotiated Compensation Agreement.

D. Vacation Schedules: Every effort will be made to grant employees leave during the time requested. If the operations would suffer by scheduling all requests during a given period of time, a schedule will be worked out with all conflicts to be resolved by the application of seniority. After vacations are posted, no changes shall be made unless mutually agreeable or an emergency arises. Employees will be encouraged to schedule vacations through the year.

Section 3 - Sick Leave:

A. Requests:

1. Supervisors shall approve sick leave of employees incapacitated from the performance of their duties. Employees shall request sick leave as far in advance as possible prior to the start of their regular tour of duty on the first day of absence.

2. Sick leave shall be requested and approved in advance for visits to and/or appointments with doctors, dentists, practitioners, opticians, and chiropractors for the purpose of securing diagnostic examinations, treatments and x-rays.

3. Employees shall not be required to furnish a doctor's certificate to substantiate requests for approval of sick leave unless such sick leave exceeds three work days continuous duration. However, if Management has given written notice to an employee that there is a good reason to believe that the employee has abused sick leave privileges, then the employee must furnish a doctor's certificate for each absence from work, which is claimed as sick leave regardless of its duration. The Union will encourage employees to conserve sick leave for use during periods of extended illness.

4. Advance sick leave requests will be given prompt consideration by the Employer consistent with Section 3(b) of this Article when the following provisions are met:

(a) The request must be submitted in writing and must be supported by acceptable medical certificates:

(b) All available accumulated sick leave to the employee's credit must be exhausted. The employee must use annual leave he/she might otherwise forfeit.

(c) In the case of employees serving under temporary appointments, or under probationary or trial periods, advance sick leave should not exceed an amount which is reasonably assured will be subsequently earned during such period.

(d) The amount of sick leave advanced to an employee's account will not exceed 240 hours at any time. Where it is known that the employee is to be separated, the total sick leave advanced may not exceed an amount which can be liquidated by subsequent accrual prior to the separation.

(e) There must be a reasonable assurance that the employee will return to duty.

B. Advance Sick Leave: Advance sick leave may be granted to permanent or probationary employees in amounts not to exceed 240 hours. Furthermore, an employee may not be indebted for more than 240 hours of sick leave at any one time. Sick leave may be advanced to

employees holding a limited appointment or one expiring on a specific date, but not in excess of the total sick leave that would accrue during the remaining period of such appointment. In either case the employee request must be supported by a statement from his/her physician attesting that the employee has a serious disability or ailment and is incapacitated for duty and stating the period of time expected to be involved. The request should be denied only if the requirements of Section 3 (a) and (b) are not met or there is a reason to believe that the employee will not return to duty or that he/she has abused the sick leave privilege in the past.

C. All accrued and accumulated sick leave must be exhausted before the advance sick leave is credited. Accrued and accumulated annual leave may remain standing to the credit of employees. The Employer will use its best efforts to answer an employee's request for advanced sick leave within fifteen (15) working days. However, an employee is responsible for applying advance sick leave in writing as far in advance as possible. If the request is denied, the reasons for such denial shall be given in writing. Further, the employee will be given consideration for LWOP consistent with the provisions of personnel rules and regulations.

Section 4 – Other Paid Leave:

A. **Military Leave:** Full-time employees are entitled to leave as reserve members of the armed forces or as members of the National Guard to the extent provided in D.C. Official Code Section 1-612.03(m) and applicable rules and regulations and the Compensation Units 1 & 2 Agreement, which provide in part the following:

1. Members of the D.C. National Guard are entitled to unlimited military leave without loss of pay for any parade or encampment with the D.C. National Guard when ordered by the Commanding General, excluding weekly drills and meetings.

2. Additional military leave with pay will be granted to full-time employees who are members of the reserve components of the Armed Forces or the National Guard for the purpose of providing military aid to enforce the law for a period not to exceed 22 workdays per calendar year.

B. **Court Leave:** Employees shall be granted leave of absence with pay anytime they are required to report for jury duty or to appear as a witness on behalf of the District of Columbia Government, or the Federal or a State or Local Government, in accordance with personnel rules and regulations.

C. **Voting Leave:** Where the polls are not open at least three hours either before or after an employee's regular hours of work, he/she may, upon request, be granted an amount of excused time which will permit him/her to report to work three hours after the polls open or leave work three hours before the polls close, whichever requires the lesser amount of time off. Leave for voting will be allowed in accordance with the personnel rules and regulations.

D. **Funeral Leave:** Funeral leave shall be granted in accordance with the Compensation Units 1 & 2 Agreement.

E. **Civic Duty:** Upon advance request and adequate justification employees required to appear before a court or other public body on public business in which they are not personally involved shall be granted leave of absence with pay unless paid leave is prohibited by Federal or District Regulations or Statutes.

F. **Examinations:** Employees shall be excused without charge to leave in accordance with personnel rules and regulations for the purpose of taking an employment medical examination and examination for induction or enlistment in the active Armed Forces, a District Government owned vehicle operator examination, a civil service examination or other examination which his/her department has requested him/her to take in order to qualify for reassignment, promotion, or continuance of his/her present job, but not for the reserve Armed Forces. An employee shall also be excused without charge to leave for the purpose of taking an examination whenever, in the judgment of the Department or agency head, the District Government will benefit thereby. Absence from duty in order to take an examination primarily for the employee's own benefit and not connected to the District Government must be requested in accordance with the general leave provisions.

Section 5 - Leave Without Pay:

A. **General:** Leave of absence without pay for a limited period may be granted at the supervisor's discretion for a reasonable purpose if requested in advance in writing.

B. **Union:** Employees elected to any Union office or selected by the Union to do work which takes them from their employment with the Employer shall at the written request of the employee and the Union be granted a leave of absence without pay; provided the written request states the purpose and duration of the absence, and is submitted thirty (30) calendar days in advance of the commencement of the desired period of absence. If the Employer indicates that the requested leave will unduly hamper its operations, it may offer an alternative for consideration by the Union.

C. The initial leave of absence shall not exceed one (1) year. Leaves of absence for Union officials may be extended for similar periods. No more than one employee from a bargaining unit shall be on such extended leave at the same time.

D. **Parenthood Leave:** Maternity leave before and following childbirth shall be granted at the request of the employee. The employee is obligated to advise her supervisor substantially in advance of the anticipated leave date. This period of absence shall be determined by the employee, her physician and her supervisor. Maternity leave is chargeable to sick leave or any combination of sick leave, annual leave, or leave without pay. Paternity leave may be granted for a period of up to two (2) weeks following childbirth, and may be extended at the supervisor's discretion. Such leave shall be a combination of annual leave or leave without pay.

E. Leave may be granted for a period of up to two (2) weeks to an employee who is adopting a child, with extensions made at the discretion of the supervisor. Such leave shall be a combination of annual leave or leave without pay.

F. **Union Officer Leave:** Attendance at Union sponsored programs may be approved annual leave or leave without pay in accordance with normal leave practices unless Administrative Leave has been approved.

G. **Educational Leave:** After completing one (1) year of service an employee upon request may be granted a leave of absence for educational purposes provided that successful completion of the course will contribute to the work of the Department. The period of leave of absence may not exceed one (1) year, but may be extended at the discretion of the Employer. If an employee is returning from educational leave during which he/she has acquired the qualification of a higher rated position he/she shall not have lost any of his/her rights in being evaluated for the higher graded position.

ARTICLE 17
ADMINISTRATION OF OVERTIME

Section 1 -Distribution:

Overtime work shall be equally distributed among employees. Specific arrangements for the equitable distribution of overtime shall be agreed to at Union Management Cooperation Meetings. Individual employee qualifications shall be considered when decisions are made on which employees shall be called for overtime work.

Section 2:

Management will solicit volunteers when overtime work is required. In the event a sufficient number of qualified volunteers are not available to perform the job functions, overtime work will be assigned to equally qualified employees in inverse order of seniority, unless a different system is worked out on a local-by-local basis. Instances of hardship should be presented to the supervisor and shall be considered on a case-by-case basis.

ARTICLE 18
WAGES

Section 1:

The salaries and wages of employees shall be paid bi-weekly. In the event the scheduled payday is a holiday, the preceding day shall be the payday. If, for any reason, an employee's paycheck is not available on the prescribed day, or if it does not reflect the full amount due, that employee will be paid as quickly thereafter as is possible, and under no circumstances will he or she be required to wait until the next regular payday.

Section 2:

If an employee's paycheck is delayed, the employee shall immediately notify his/her supervisor. The supervisor shall initiate efforts through the agency controller to obtain a supplemental payment. Supplemental payments will not effectuate normal payroll deductions. Appropriate payroll deductions will be deducted from the employee's subsequent paycheck. (Except DHS, see Attachment 6.)

ARTICLE 19
REDUCTION-IN-FORCE

Section 1 - Definition:

The term reduction-in-force, as used in this Agreement means the separation of a permanent employee, his/her reduction in grade or pay, or his/her reduction in rank because of (a) reorganization, (b) abolishment of his/her position, (c) lack of work, (d) lack of funds, (e) new equipment, (f) job consolidation or (g) displacement by an employee with greater retention rights who was displaced because of (a) through (f) above.

Section 2 – Consultation:

The Employer agrees to consult in advance with the Union prior to reaching decisions that might lead to a reduction-in-force in the bargaining unit. The Employer further agrees to minimize the effect and such reduction-in-force on employees and to consult with the Union toward this end.

Section 3 - Procedure:

A reduction-in-force will be conducted in accordance with the provisions set forth in the Comprehensive Merit Personnel Act [(CMPA), D.C. Official Code § 1-624].

Section 4 – Impact and Effects Bargaining:

In the event of a reduction-in-force, the Employer shall, upon request, provide the Union with appropriate information to insure that the Union can engage in impact and effects bargaining over the reduction-in-force.

Section 5 - Review of Procedures:

In the event of reduction-in-force, the affected employee will receive credit for his/her performance in accordance with the Comprehensive Merit Personnel Act, [D.C. Official Code Ann., Title 1, Section 1-624 (2001 Edition)].

ARTICLE 20
CONTRACTING OUT

Section 1:

During the term of this Agreement the Department shall not contract out work traditionally performed by employees covered by this Agreement, except where Manpower (including expertise and technology) and/or Equipment in the department/agency are not available to perform such work, when it is determined by the Mayor that budgetary conditions exist requiring contracting out, or when it is determined by the Department that emergency conditions exist requiring such contracting out (provided however that the contracting out is for a period of time that the emergency exists). The Agency shall consult with the Union prior to any formal notice to contract out bargaining unit work.

Section 2:

When there will be adverse impact to bargaining unit employees, the Employer shall consult with the Union thirty (30) days prior to final action, except in emergencies. The Union shall have full opportunity to make its recommendations known to the Employer who will duly consider the Union's position and give reasons in writing to the Union for any contracting out action. The Agency shall consult with the Union to determine if the needs of the Government may be met by means other than contracting out work traditionally performed by bargaining unit employees.

ARTICLE 21
STRIKES AND LOCKOUTS

Section 1 - Definition:

The term strike as used herein means any unauthorized concerted work stoppage or slowdown.

Section 2 - Strikes:

It shall be unlawful for any District Government employee or the Union to participate in, authorize or ratify a strike against the District.

Section 3 - Lockouts:

No lockout of employees shall be instituted by the Employer during the term of this Agreement except that the Employer in a strike situation retains the right to close down any facilities to provide for the safety of employees, equipment or the public.

Section 4 - Other Considerations:

At no time however, shall employees be required to act as strikebreakers.

ARTICLE 22
GRIEVANCE PROCEDURES

Section 1:

Any grievance or dispute which may arise between the parties involving the application, meaning or interpretation of this Agreement, shall be settled as described in this Article unless otherwise agreed to by the parties.

Section 2 - Procedure:

This procedure is designed to enable the parties to settle grievances at the lowest possible administrative level. Therefore, grievances should be filed at the lowest level where resolution is possible. Accordingly, a grievance may be filed at the Step in the grievance procedure where the alleged action, which precipitated the grievance, occurred.

Step 1: The employee and/or the Union shall take up the grievance or dispute with the employee's immediate supervisor as soon as is practicable, but no later than fifteen (15) working days from the date of the occurrence or when the Union and/or the employee first had knowledge of or should have known of the occurrence. The supervisor shall attempt to adjust the matter and shall respond to the Steward as soon as is practicable, but not later than fifteen (15) working days after the receipt of the grievance.

Step 2: If the grievance has not been settled, it shall be presented in writing by the employee and/or the Union to the second level supervisor within ten (10) working days after the Step 1 response is due or received, whichever is sooner. The written grievance shall be clearly identified as a grievance submitted under the provisions of this Article, and shall list the contract provision violated, a general description of the incident giving rise to the grievance, the date or approximate date and location of the violation and the remedy sought. The second level supervisor shall respond to the Union and/or employee in writing within ten (10) working days after receipt of the written grievance.

Step 3: If the grievance is still unresolved, it shall be presented in writing by the employee and/or Union to the third level supervisor within ten (10) working days after the Step 2 response is due or received, whichever is sooner. The third level supervisor shall respond in writing (with a copy to the Local President) within ten (10) working days after receipt of the written grievance.

Step 4: If the grievance is still unresolved, it shall be presented by the employee and/or the Union to the Office of the Director or his/her designated representative, in writing within fifteen (15) working days after the Step 3 response is due or received, whichever is sooner. The office of the Director, or his/her designated representative shall respond in writing (with a copy to the Local President) within fifteen (15) working days after the receipt of the written grievance and a copy to the Office of Labor Relations and Collective Bargaining.

Step 5: If the grievance is still unresolved, the Union may by written notice request arbitration within twenty (20) days after the reply at Step 4 is due or received, whichever is sooner.

Section 3 - Union Participation:

A. The Employer shall notify the Union in writing of all grievances filed by the employees, all grievance hearings and determinations when such employees present grievances without the Union. The Union shall have the right to have a representative present at any grievance hearing and shall be given forty-eight (48) hours notice of all grievance hearings.

B. Any grievance of a general nature affecting a large group of employees and which concerns the misinterpretation, misapplication, violation or failure to comply with the provisions of the Agreement shall be filed at the option of the Union at the Step or level of supervision where the grievance originates without resorting to previous steps.

Section 4 - Who May Grieve:

Either an employee or the Union may raise a grievance, and if raised by the employee, the Union may associate itself therewith at any time if the employee so desires. Whenever the Union shall raise or is associated with a grievance under this procedure, such a grievance shall become the Union's grievance with the Employer. If raised by the Union, the employee may not thereafter raise the grievance him/herself, and if raised by the employee, he/she may not thereafter cause the Union to raise the same grievance independently.

Section 5 - Selection of the Arbitrator:

A. The arbitration proceeding shall be conducted by an arbitrator to be selected by the Employer, through the Office of Labor Relations and Collective Bargaining, and by the Union as soon as possible after notice of intent to arbitrate is received. If the parties fail to select an arbitrator, the Federal Mediation and Conciliation Service (FMCS) or the American Arbitration Association (AAA) shall be requested to provide a list of seven (7) arbitrators from which an arbitrator shall be selected within seven (7) days after receipt of the list by both parties.

B. Both the Employer and the Union may strike three (3) names from the list using the alternate strike method. The party requesting arbitration shall strike the first name. The arbitration hearing shall be conducted pursuant to the American Arbitration Association guidelines unless modified by this Agreement.

Section 6 - Decision of the Arbitrator:

The decision of the arbitrator shall be final and binding on the parties and shall not be inconsistent with the terms of this Agreement. The arbitrator shall be requested to render his/her decision in writing within thirty (30) days after the conclusion of the arbitration hearing.

Section 7 - Expenses of the Arbitrator:

Expenses for the arbitrator's services and the proceeding shall be borne equally by the Employer and the Union. However, each party shall be responsible for compensating its own representatives and witnesses. If either party desires a record of the arbitration proceedings, it may cause such a recording to be made, providing it pays for the record and make copies available without charge to the other party and the arbitrator.

Section 8 - Time Off For Grievance Hearings:

The Employee, Union Steward and/or Union representatives shall upon request, be permitted to meet and discuss grievances with designated management officials at each step of the Grievance Procedure within the time specified consistent with Section 3 of Article 6 on Union Stewards.

Section 9 - Time Limits:

All time limits set forth, in this Article may be extended by mutual consent, but if not so extended, must be strictly observed. If the matter in dispute is not resolved within the time period provided for in any step, the next step may be invoked.

Section 10:

Matters not within the jurisdiction of the department/agency will not be processed as a grievance under this Article unless the matter is specifically included in another provision of this Agreement or the Compensation Agreement.

Section 11:

A. The parties agree that a process of grievance mediation may facilitate satisfactory solutions to grievances prior to arbitration. Therefore, on an experimental basis and when mutually agreed to by the parties, a mediator may be selected and utilized to facilitate settlements. The mediator may not impose a settlement on the parties, and any settlement reached will not be precedential unless otherwise agreed to by the parties on a case-by-case basis.

B. Grievances may be combined for the purpose of mediation upon mutual agreement by the parties.

ARTICLE 23
EMPLOYEE RIGHTS

Employees of the Unit shall have and shall be protected in the exercise of the right, freely and without fear of penalty or reprisal, to form, join and assist the Union or to refrain from any such activity. Except as expressly provided herein, the freedom shall be recognized as extending to participation in the management of the Union and acting for it in the capacity of a union representative, including representation of its views to the officials of the Mayor, D.C. Council or Congress.

ARTICLE 24
NEW TECHNOLOGY AND EQUIPMENT

Section 1:

Whenever new equipment or technological changes will significantly affect operations, the Employer shall provide notice to the Union at least 60 days in advance. This time limit does not apply to the introduction of equipment or technological changes on an experimental basis. When the Employer introduces such equipment or technological changes on an experimental basis the Employer will notify the Union upon introduction as where the experiment is being conducted and its nature and intended duration and will provide 60 days notice if the experiment is to be instituted permanently.

Section 2:

The Employer shall provide any reasonable training for affected employees to acquire the skills and knowledge necessary for new equipment or procedures. The training shall be held during working hours, when reasonably available. The Employer shall bear the expense of the training.

Section 3:

If training is required by the Agency for employment and the training is held outside the employee's normal tour of duty, the employee shall receive compensatory time.

ARTICLE 25
JOB DESCRIPTIONS

Each employee within the unit shall receive a copy of his/her current job description upon request. When an employee's job description is changed, the employee and the Union shall be provided a copy of the new job description.

ARTICLE 26
SAVINGS CLAUSE

In the event any Article, Section or portion of the Agreement shall be held invalid and unenforceable by any court or higher authority of competent jurisdiction, such decision shall apply only to the specific Article, Section, or portion thereof specified in the decision, and upon issuance of such a decision, the Employer and the Union agree to immediately negotiate a substitute for the invalidated Article, Section or portion thereof.

ARTICLE 27
DURATION AND FINALITY

Section 1 - Duration of Agreement:

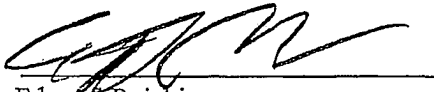
This Agreement shall be implemented as provided herein subject to the requirements of Section 1715 of the CMPA (Section 1-617.15(a), D.C. Official Code, 2001 Edition). This Agreement shall be effective as of the day of final approval, and shall remain in full force and effect until the 30th day of September, 2010. Should either party desire to renegotiate, renew, extend or modify this Contract, notice will be given in writing in accordance with the requirements of the Comprehensive Merit Personnel Act. This Agreement shall remain in full force and effect during the period of negotiations.

Section 2 - Finality:

This Agreement was reached after negotiations during which the parties were able to negotiate on any and all negotiable non-compensation issues, and contains the full agreement of the parties as to all such non-compensation issues that were or could have been negotiated. The Agreement shall not be reconsidered during its life unless by mutual consent or as required by law.

On this _____ day of October, 2006 and in witness to this Agreement, the parties hereto set their signatures.

**FOR THE DISTRICT OF COLUMBIA
GOVERNMENT**

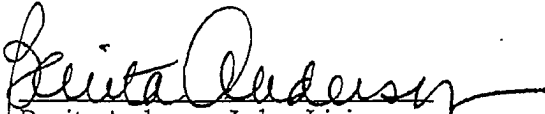


Edward Reiskin
Interim City Administrator/
Deputy Mayor for Public Safety
And Justice

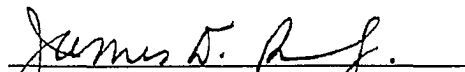


Natasha Campbell, Esq.
Supervisory Attorney Advisor
Office of Labor Relations
and Collective Bargaining

Carol Mitten, Director
Office of Property Management

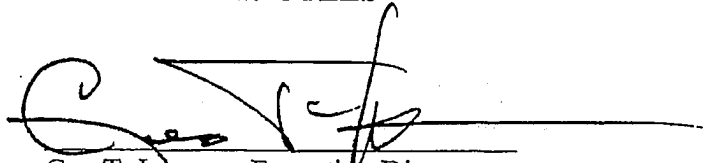


Benita Anderson, Labor Liaison
Office of Property Management

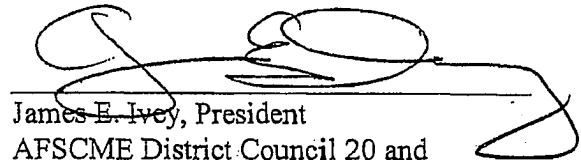


James Brown, Executive Director
Office of the Cable Television and
Telecommunications

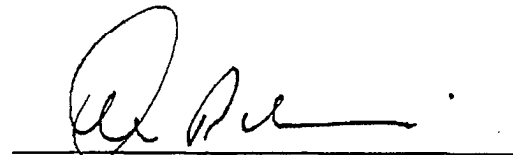
**FOR THE AMERICAN FEDERATION
OF STATE, COUNTY AND MUNICIPAL
EMPLOYEES**



Geo T. Johnson, Executive Director
AFSCME District Council 20



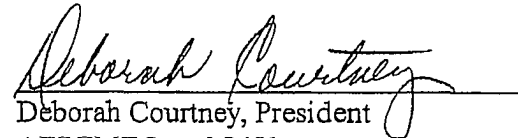
James E. Ivey, President
AFSCME District Council 20 and
AFSCME Local 2091



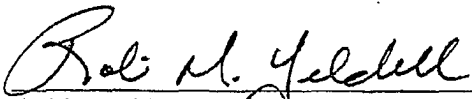
Al Bilik, Executive Assistant
AFSCME District Council 20



Brenda Featherstone, President
AFSCME Local 1200



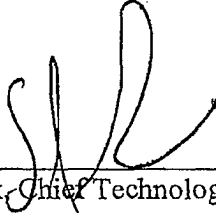
Deborah Courtney, President
AFSCME Local 2401



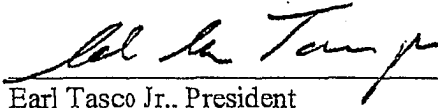
Robin Yeldell, Labor Liaison
Office of Cable Television and
Technology



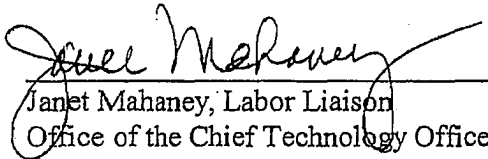
Cliff Dedrick, President
AFSCME Local 2743



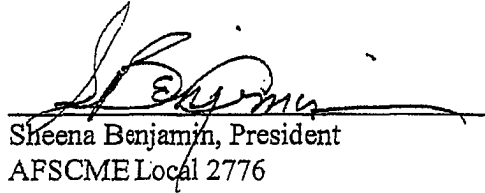
Suzanne Peck, Chief Technology Officer
Office of the Chief Technology Officer



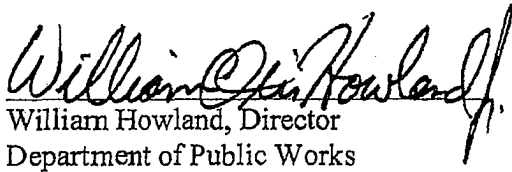
Earl Tasco Jr., President
AFSCME Local 2092



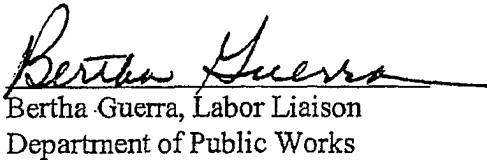
Janet Mahaney, Labor Liaison
Office of the Chief Technology Officer



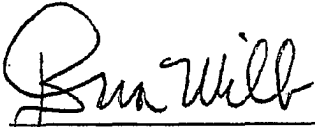
Sheena Benjamin, President
AFSCME Local 2776



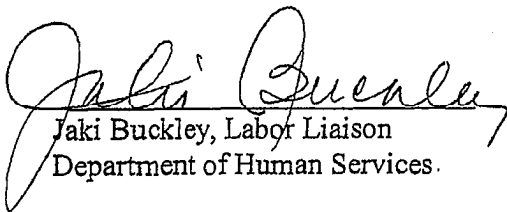
William Howland, Director
Department of Public Works



Bertha Guerra, Labor Liaison
Department of Public Works



Brian Wilbon, Interim Director
Department of Human Services



Jaki Buckley, Labor Liaison
Department of Human Services

Eugene A. Adams

Eugene Adams, Acting Attorney General
Office of the Attorney General

Patricia Higgins

Patricia Higgins, Labor Liaison
Department of Health

Gail Elkins Davis

Gail Elkins Davis, Labor Liaison
Office of the Attorney General

Dr. Gregg Kane

Dr. Gregg Kane, Director
Department of Health

Bernadine Booker Brown

Bernadine Booker-Brown, Labor Liaison
Department of Health

Thomas Hampton

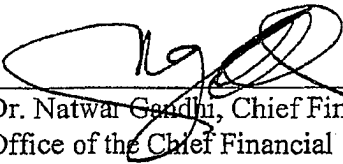
Thomas Hampton, Director ~~Commissioner~~
Department of Insurance, Securities
and Banking

Patricia Haylock

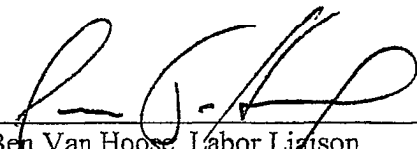
Patricia Haylock, Labor Liaison
Department of Insurance, Securities
and Banking

Dr. Patrick Canavan, Director
Department of Consumer and
Regulatory Affairs

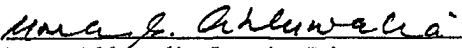
Deborah Bonsack, Labor Liaison
Department of Consumer and
Regulatory Affairs



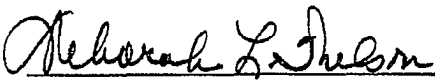
Dr. Natwar Gandhi, Chief Financial Officer
Office of the Chief Financial Officer



Ben Van Hoose, Labor Liaison
Office of the Chief Financial Officer



Uma Ahluwalia, Interim Director
Child and Family Services Agency



Debra Wilson, Labor Liaison
Child and Family Services Agency

**DEPARTMENT OF HUMAN SERVICES AND THE
AMERICAN FEDERATION OF STATE,
COUNTY AND MUNICIPAL EMPLOYEES
LOCAL 2401**

PARTIES

The parties to this Supplemental Agreement and Attachment to the Master Agreement between the American Federation of State, County and Municipal Employees (AFSCME), District of Columbia Council 20, AFL-CIO and the District of Columbia Government" are AFSCME, Local 2401 and District of Columbia agencies under the personnel authority of the Mayor that have collective bargaining units for which AFSCME, Local 2401 is the certified exclusive collective bargaining representative.

CASELOAD SIZE AND COVERAGE

Unmanageable caseloads and workloads in social service programs are a national problem, which has led to worker burnout, high turnover rates and service gaps for clients. Although, the Union recognizes the Agency's obligation to provide the optimum level of service to all eligible residents of the District of Columbia, consistent with statutory and court-mandated obligations; and to accomplish this within the budgetary and manpower resources which are available for that purpose, the Parties agree that a joint labor-management effort is appropriate to address this problem and the impact on the employees represented by AFSCME, Local 2401.

Accordingly, the parties agree to establish a joint labor-management committee to examine caseload size and coverage and the impact of workload assignments on bargaining unit employees. The committee shall explore solutions to the problem of unmanageable caseloads within the Department of Human Services (DHS) and Office of the Attorney General, Child Support Division and consider issues related to caseload size and coverage in agencies providing direct service delivery and those focusing on oversight or monitoring functions. Membership on the committee shall be determined and appointed by the parties but shall include individuals who have a working knowledge of the issues to be examined by the committee.

The parties agree that the committee shall:

1. Focus immediate attention on the DHS, Income Maintenance Agency;
2. Determine relevant comparisons for analysis of the District's caseload issues, e.g. national standards in relevant program areas, studies and reports, guidance of relevant industry associations and governing bodies;

3. Seek the participation and assistance of the Child and Family Service Agency.
4. Recommend maximum caseload assignments that will allow employees to effectively perform their job responsibilities.

Within one year of its establishment, the committee shall issue its report and recommendations for a joint labor-management strategy for a long-term solution to the issue of unmanageable caseloads. During the initial year, the committee shall also explore the implementation of pilot programs within relevant agencies to as a means of developing more immediate options for addressing impacts on employees while allowing agencies to provide the optimum level of service to all eligible residents of the District of Columbia, within the budgetary and manpower resources, that include reasonable, obtainable performance requirements for bargaining unit employees.

This provision shall not be interpreted, in any way, to preclude management from assigning work or assigning employees. Rather, this provision represents the parties' joint commitment to work collaboratively to accomplish agency mission requirements and strategic plan goals, while recognizing the rights of employees and their desire for reasonable terms and conditions of employment.

OFFICIAL TRAVEL

The Employer agrees to provide and maintain vehicles for all field related duties in safe operating condition, and to present them for D.C. Safety Inspection at the prescribed time.

Management shall reimburse its employees for expenses incurred for official travel. Employees who have official approval to use their personnel vehicles for agency business shall be paid in accordance with the Compensation Agreement between the District of Columbia and Compensation Units 1 and 2. Reimbursement will be paid directly to the employee with a reasonable time after said expenses have been properly vouchered by said employee.

REST PERIODS

When an employee is required to work two (2) consecutive eight (8) hour shifts, the employee shall be afforded fifteen (15) minutes after the first shift and before the second shift providing there is no interruption of client services.

SAFETY COMMITTEE

A. A Safety Committee of three (3) representatives from AFSCME and three (3) representatives from the District is hereby established in each department/agency. One (1) AFSCME and one (1) District representative shall each serve as co-chairpersons

of the Committee. The Agency's Risk Management official shall serve on the Safety Committee as one of the agency representatives. The Safety Committee shall:

1. Meet on a monthly basis, unless mutually agreed otherwise. Prior to regularly scheduled monthly meeting, labor and management must submit their respective agendas to each other at least five (5) days in advance;
2. Conduct safety surveys, consider training needs, and make recommendations to the agency/department head and the Office of Risk Management;
3. Make recommendations to the Office of Risk Management and the department/agency heads; and,
4. Receive appropriate health and safety training.

B. Final reports or responses from agency/department heads (or designees) shall be provided to the Safety Committee within a reasonable period of time on safety matters initiated by the Committee.

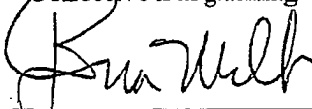
C. Safety Committees may be reorganized upon agreement of both parties.

On this ____ day of October, 2006 and in witness to this Agreement, the parties hereto set their signatures.

**FOR THE DISTRICT OF COLUMBIA
GOVERNMENT**



Natasha Campbell
Supervisory Attorney Advisor
Office of Labor Relations and
Collective Bargaining



Brian Wilson, Interim Director
Office of Human Services

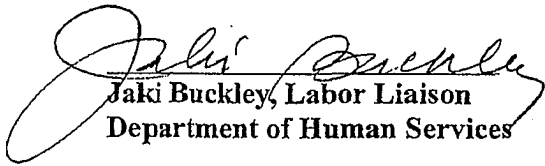
**FOR THE AMERICAN
FEDERATION OF STATE,
COUNTY AND MUNICIPAL**




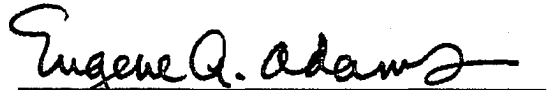
Geo. T. Johnson,
Executive Director, AFSCME,
District Council 20

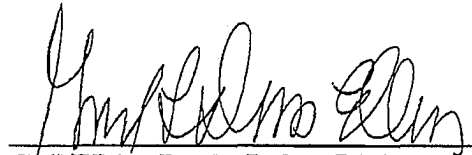


Deborah Courtney, President
AFSCME, Local 2401


Jaki Buckley, Labor Liaison
Department of Human Services


Al Bilik, Executive Assistant
AFSCME District Counsel 20


Eugene Adams, Acting Attorney General
Office of the Attorney General


Gail Elkins Davis, Labor Liaison
Office of the Attorney General

**ATTACHMENT NO. 11
TO MASTER AGREEMENT
BETWEEN THE
GOVERNMENT OF THE DISTRICT OF COLUMBIA
AND
AMERICAN FEDERATION OF STATE, COUNTY AND MUNICIPAL
EMPLOYEES
COVERING THE
DISTRICT OF COLUMBIA DEPARTMENT OF PUBLIC WORKS EMPLOYEES
IN THE BARGAINING UNIT REPRESENTED BY
AMERICAN FEDERATION OF STATE, COUNTY AND MUNICIPAL
EMPLOYEES
LOCAL 2091**

**ARTICLE 1
RECOGNITION**

The Parties shall file Joint Petitions with the Public Employee Relations Board ("PERB") to clarify and correct unit certifications, which are inaccurate, or confusing as a result of Agency reorganizations, realignments or name changes. Prior to filing of the joint petitions, the Parties shall confer on the revised unit descriptions.

**ARTICLE 2
REST PERIODS**

All employees working eight (8) hour shifts shall be provided a fifteen (15) minute rest period for each half shift or four (4) hours worked to be scheduled by the supervisor to insure continuity of operations. Where possible, rest periods shall be scheduled at the middle of each half-shift or four (4) hours. The same principle shall apply for overtime worked beyond the regular shift except that the employee need work only one (1) or more hours to qualify for the fifteen (15) minute overtime rest period. Where possible, this initial overtime rest period shall be granted prior to the overtime work. The employee shall be given a fifteen (15) minute rest period for every four (4) hours or major portion thereof worked.

**ARTICLE 3
CLEAN-UP TIME**

Employees working eight (8) hour shifts shall be granted a fifteen (15) minute personal clean-up time prior to the end of the shift or prior to the end of overtime.

ARTICLE 4
ICE MACHINES AND WATER COOLERS

Section 1: The Employer agrees to furnish and maintain water coolers, ice machines, and cups wherever and whenever necessary. The Employer agrees to service and keep all water coolers, ice machines and drinking fountains in proper working condition.

Section 2: The Employer agrees to provide a stove or microwave and a refrigerator, at all permanent locations for employees' use. The Employer shall maintain stoves, microwaves and refrigerators in good working order subject to normal wear and tear.

ARTICLE 5
SAFETY COMMITTEES

Section 1: A Safety Committee comprised of five (5) representatives from AFSCME Local 2091 and five (5) representatives from the District are hereby established in the Department Solid Waste Management Administration. One (1) AFSCME and one (1) District representative shall each serve as co-chairpersons of the Committee. The Safety Committee shall:

- A. Meet on a monthly basis unless mutually agreed otherwise. Prior to regularly scheduled monthly meetings the parties shall submit issues for the agenda. A final agenda must be submitted at least five (5) days in advance of the meeting.
- B. Conduct safety surveys, consider training needs and make recommendations to the Agency; and,
- C. Consult with and advise department/agency safety officer and head; and
- D. Cooperate with the Office of Risk Management.

Section 2: Final reports shall be provided to the Safety Committee on all safety matters initiated by the Committee.

Section 3: The Safety Committee may be reorganized upon agreement of both parties.

ARTICLE 6
OVERTIME

Section 1: Management retains the unfettered right to determine necessary job requirements for assignments and to determine the employees who are eligible to work the assignments.

Section 2: Where management determines that employees are equally capable to perform overtime assignments, assignments will be offered to employees on a volunteer basis and distributed equitably among those employees.

Section 3: A list shall be posted for employees to sign up for overtime hours. For work on a Saturday after a Holiday, the list shall be posted for at least five days, two weeks prior to the Holiday. The employee must be present to sign his/her own name on the list. Management will not arbitrarily deny employees overtime. If an employee who volunteers is denied overtime, the supervisor shall notify the employee of the denial.

Section 4: Based on operational demands and/or emergencies when it becomes necessary for management to order mandatory overtime, prior to assigning employees, management will first attempt to request volunteers. If there is an insufficient number of volunteers, mandatory assignments shall be made equitably from among all qualified employees on a reverse seniority basis. For work on a Saturday after a Holiday, the list of mandatory assignments shall be posted at least five days prior to the Holiday.

Section 5: To be eligible for an overtime assignment employees must be able to perform the duties of the assignment as determined by management. Any employee who volunteers and is subsequently assigned to report for duty or is given a mandatory work assignment beyond normal work hours, but fails to report, shall be considered absent without leave (AWOL) and may be disciplined accordingly.

ARTICLE 7 EQUIPMENT AND TOOLS

Section 1: Employees shall be responsible for all equipment and tools issued to the employee by Management or signed out by the employee for temporary use. It shall be the responsibility of each employee to maintain tools and equipment in good working order and to notify management of the need to repair and/or service tools and equipment.

Section 2: Employees may be charged for lost tools and equipment or for loss or damages that result from the failure of an employee to make reasonable efforts to prevent such loss of damage.

Section 3: Employees may submit tools and equipment for replacement based upon a determination that the items are unserviceable; provided that the tools and/or equipment submitted for replacement is an item issued by the Department to the employee. Management shall determine serviceability of the items and establish the procedure to be used by employees to request replacements.

ARTICLE 8 UNIFORMS

Section 1: Employees assigned to the Solid Waste Education and Enforcement Program whose duties require uniforms shall be issued five (5) pairs of pants; five (5) long sleeve shirts; five (5) short sleeve shirts; five (5) winter polo shirts; five (5) summer polo shirts; one (1) pair safety shoes; one (1) raincoat or rain suit; and one (1) winter jacket.

Section 2: All other employees whose duties require uniforms, shall be issued eleven (11) basic uniforms (including shirts, pants and/or coveralls); one (1) set of thermal coveralls for employees who work outside; one (1) light jacket with zip-in lining; one (1) pair safety shoes; one (1) raincoat or rain suit. If appropriate, employees will also be issued one (1) safety vest; one (1) pair of safety goggles and one (1) back brace.

Section 3: Employees issued uniforms and safety equipment are required to wear uniforms and safety equipment on duty.

Section 4: Employees terminating their employment must return all uniforms and safety equipment to the General Foreman prior to receiving their final paycheck.

Section 5: Each employee shall be responsible for the care and upkeep of issued uniforms and safety equipment. Employees may be charged for lost uniforms and equipment or for loss or damages that results from the failure of an employee to make reasonable efforts to prevent such loss or damage.

Section 6: Employees may submit uniform items, including shoes (worn out) or safety equipment for replacement based upon a determination that the items are unserviceable; provided that the uniform and or equipment submitted for replacement is an item issued by the Department to the employee, as described above. The Uniform Committee shall determine serviceability of the items and establish the procedure to be used by employees to request replacements. Requests for replacement shall be submitted to the supervisor.

Section 7: At the request of the employee, the Uniform Committee will consider additional uniforms or protective equipment for employees engaging in brazing, welding, cutting, snow detail, or environmental hazards.

Section 8: Employees assigned to collection of dead animals will be provided appropriate equipment for protection. The Union may recommend new protective equipment and modifications to existing equipment for consideration by the Employer. The Employer shall provide and maintain in working order appropriately refrigerated vehicles used in dead animal collection.

ARTICLE 9
TRASH COLLECTION ROUTE MONITORING

On an as needed basis, the Parties shall form a joint labor-management work group to monitor trash collection routes by: (1) investigating complaints concerning inequities in route structure and (2) recommending to management necessary adjustments for implementation with supporting justification. Reports and recommendations will be a matter of record. The Union shall appoint no more than two employees to the route monitoring work group. An employee designated by the Union must be intimately familiar with the issues being studied. After completion of route inspections or other assigned committee duties, employees will return to their regularly assigned duties. If necessary, the employee shall be furnished transportation by the Employer to perform assigned route monitoring functions.

ARTICLE 10
REFUSE COLLECTION

Section 1 - Refuse Collection: Each workday employees assigned to a refuse collection crew shall be responsible for the satisfactory completion of a scheduled route or task. Upon satisfactory completion of a scheduled route or task, employees shall be considered to have completed their day. If more than eight (8) hours are required to satisfactory complete a scheduled route, the employees shall be compensated for the total number of hours worked. Notwithstanding the above, no crew shall be required to collect more than four (4) loads using a 16-Cubic Yard packer vehicle. A refuse collection crew shall be composed of a crew chief/motor vehicle operator and two sanitation work collectors.

Section 2: Each workday employees assigned to a refuse collection crew shall be responsible for the satisfactory completion of a scheduled route or task.

Section 3: The daily task for employees engaged in the collection of refuse means the satisfactory completion of a refuse collection route by a crew using the following work standards:

- A. All containerized and non-containerized refuse must be collected at the authorized point of collection and containers returned to their original location;
- B. All small bulk items, tree limbs and brush, bagged leaves and grass, Christmas trees, other containerized or bagged yard waste will be collected at the authorized point of collection; and
- C. The clean up of all spillage.

Section 4: In addition to the above work standards, refuse collection crews in the twice a week area shall perform the following task on assigned days.

Mondays and Tuesdays: Satisfactory completion of assigned route, not to exceed four (4) loads using a 16-Cubic Yard packer vehicle.

Wednesdays: Assigned to street and alley cleaning: All crews. Management reserves the right to assign trash collection work in lieu of street and alley cleaning assignments on Wednesdays.

Thursdays and Fridays: Satisfactory completion of assigned route to include all collectible bulky items, as set forth in Article 10, Section 3.B.

Section 5: The Parties agree that the joint labor-management work group, established in Article 9 of this Attachment, shall immediately begin the investigation of trash collection route structure and practices and, within six months of the date of this Agreement, consult, confer and provide recommendations concerning more effective methods of responding to constituent needs and current Agency workload requirements. Thereafter, the parties shall meet and bargain over (or in the alternative, through collaborative processes agree on) any proposed changes to trash collection route structure and practices.

Section 6 - Alley Cleaning: The employer reserves the right to assign trash crews to an alley-cleaning route. Satisfactory completion of an alley cleaning route shall include sweeping, brooming, shoveling and removal of all visible trash, small bulk, tree limbs and brush, bagged leaves and grass, Christmas trees, other containerized or bagged yard waste, and dirt from fence line to fence line. Upon satisfactory completion of a scheduled route or task, employees shall be considered to have completed their day.

ARTICLE 11 ENVIRONMENTAL CRIMES UNIT (ECU)

Section 1: Although employees assigned to the Environmental Crimes Unit (ECU) work under the general oversight of the MPD supervisor (sergeant) for daily operations, it is understood that these employees will remain administratively accountable to the command level DPW (Division Official).

Section 2: The employer agrees to provide employees assigned to ECU access to employee health services as proscribed in Article 9, entitled, *Safety and Health*, Sections 7 and 12.

ARTICLE 12
COMMITTEE TO REVIEW PROCESS OF COLLECTION OF REFUSE AND RECYCLABLE PRODUCTS

Section 1: The Union and the Department agree to establish the "Committee to Review the Current Process of Collection of Refuse and Recyclable Products" (the Committee) to review the process of collection of refuse and recyclable products.

Section 2: The parties agree that within one month of the date of the ratification of this Agreement, the Committee to Review the Current Process of Collection of Refuse and Recyclable Products will be established.

Section 3: The Committee shall be comprised of eight (8) members, with four (4) members designated by the Union and four (4) members designated by the Employer. The Committee will submit a report of its findings, including pros and cons of the current system or any proposed system(s); recommendations and conclusion(s) no later than (4) months after the initial meeting. The four (4) month period may be extended by mutual consent of the parties. The arbitration provisions outlined in the collective bargaining agreement may be invoked by either party to resolve issues. The Committee may by consensus discuss and consider other issues that are not mandatory bargaining subjects, if directly related to reviewing the current process of trash collection and recyclable products.

Section 4: The Committee shall meet at least once per month, unless mutually agreed otherwise. Each party may bring a specialist to speak on or clarify.

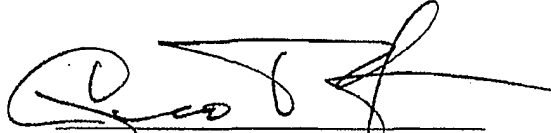
On this ____ day of October, 2006 and in witness to this Agreement, the parties hereto set their signatures.

**FOR THE DISTRICT OF COLUMBIA
GOVERNMENT**

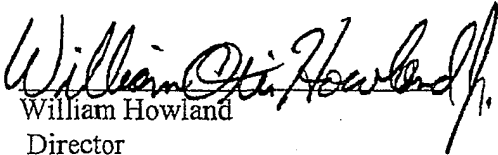
**FOR THE AMERICAN FEDERATION
OF STATE, COUNTY AND
MUNICIPAL EMPLOYEES**



Natasha Campbell
Supervisory Attorney Advisor
Office of Labor Relations
And Collective Bargaining




Geo. T. Johnson, Executive Director
AFSCME District Council 20



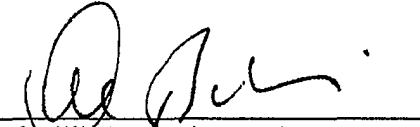
William Howland
Director
Department of Public Works



James E. Ivey, President
AFSCME District Council 20 and
AFSCME Local 2091



Bertha Guerra, Labor Liaison
Department of Public Works



Al Bilik, Executive Assistant
AFSCME District Council 20

APPROVAL

The Collective Bargaining Agreement between the District of Columbia Government and the American Federation of State, County and Municipal Employees, District Council 20 (for Locals 2091, 2743, 2401, 1200 and 2092), dated has been reviewed in accordance with Section 1715(a) of the District of Columbia Comprehensive Merit Personnel Act of 1978 (Section 1-617.15(a), D.C. Official Code, 2001 Edition) and is hereby approved this 28th day of December, 2006.

Anthony A. Williams

Anthony A. Williams
Mayor

**COMPENSATION COLLECTIVE BARGAINING
AGREEMENT**

BETWEEN

THE DISTRICT OF COLUMBIA GOVERNMENT

AND

COMPENSATION UNITS 1 AND 2

**EFFECTIVE October 1, 2021, through
September 30, 2025**

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PREAMBLE

This Compensation Agreement is entered into between the Government of the District of Columbia and the undersigned labor organizations representing units of employees comprising Compensation Units 1 and 2, as certified by the Public Employee Relations Board (PERB).

The Agreement was reached after negotiations during which the parties were able to negotiate on any and all negotiable compensation issues and contains the full agreement of the parties as to all such compensation issues. The Agreement shall not be reconsidered during its life nor shall either party make any changes in compensation for the duration of the Agreement unless by mutual consent or as required by law.

ARTICLE 1 WAGES

SECTION A: FISCAL YEAR 2022:

In lieu of a wage-increase for FY 2022, employees will receive a three and one-half percent (3.5%) bonus payment. Bargaining unit employees actively on the payroll as of October 1, 2021, shall receive a one-time payment that is equivalent of 3.5% of an employee's annual base salary as of October 1, 2021.

The payment will be made no later than ninety (90) days after the Council's approval of this Agreement.

SECTION B: FISCAL YEAR 2023:

Effective the first day of the first full pay period beginning on or after October 1, 2022, the FY 2023 salary schedules of employees employed in bargaining units as certified and assigned to Compensation Units 1 & 2 by the Public Employees Relations Board shall be adjusted by two and a one-half percent (2.5%).

SECTION C: FISCAL YEAR 2024:

Effective the first day of the first full pay period beginning on or after October 1, 2023, the FY 2024 salary schedules of employees employed in bargaining units as certified and assigned to Compensation Units 1 & 2 by the Public Employees Relations Board shall be adjusted by three percent (3.0%).

SECTION D: FISCAL YEAR 2025:

Effective the first day of the first full pay period beginning on or after October 1, 2024, the FY 2025 salary schedules of employees employed in bargaining units as certified and assigned to Compensation Units 1 & 2 by the Public Employees Relations Board shall be adjusted by three percent (3.0%).

SECTION E: WITHIN GRADE INCREASES

All employees covered by this agreement shall progress through the salary scale and receive within grade step increases as described in Section 1127 of the District Personnel Manual. 6B DCMR §1127 (Transmittal No. 233, September 21, 2018).

**ARTICLE 2
METRO PASS**

The District of Columbia Government shall subsidize the cost of monthly transit passes for personal use by employees by not less than fifty (\$50.00) per month for employees who purchase and use such passes to commute to and from work. The metro transit benefit will roll over from month to month for employees who access the benefit. Any benefit not accessed by the end of the calendar year will revert back to the District of Columbia government.

**ARTICLE 3
PRE-PAID LEGAL PLAN**

SECTION A:

The Employer shall make a monthly contribution of seventeen dollars and fifty cents (\$17.50) for each bargaining unit member toward a pre-paid legal services plan. For each fiscal year, the Employer shall make monthly contributions directly to the designated provider of the legal services program.

SECTION B:

The plan shall be contracted for by the Union subject to a competitive bidding process where bidders are evaluated and selected by the Union. The District may present a proposed contract which shall be evaluated on the same basis as other bidders. The contract shall provide that the Employer will be held harmless from any liability arising out of the implementation and administration of the plan by the benefit provider, that the benefit provider will supply utilization statistics to the Employer and the Union upon request for each year of the contract, and that the benefit provider shall bear all administrative costs.

SECTION C:

The parties shall meet to develop procedures to implement the legal plan which shall be binding upon the benefit provider. The procedures shall include an enrollment process.

SECTION D:

To be selected for a contract under this Article, the benefit provider must maintain an office in the District of Columbia; be incorporated in the District and pay a franchise tax and other applicable taxes; have service providers in the District; and maintain a District bank account.

SECTION E:

The Employer's responsibility under the terms of this Article shall be as outlined in Section C of this Article and to make premium payments as is required under Section A of this Article. To the extent that any disputes or inquiries are made by the legal services provider chosen by the Union, those inquiries shall be made exclusively to the Union. The Employer shall only be required to communicate with the Union to resolve any disputes that may arise in the administration of this Article.

**ARTICLE 4
DISTRICT OF COLUMBIA NEGOTIATED EMPLOYEE
ASSISTANCE HOME PURCHASE PROGRAM**

SECTION A:

The Parties shall continue the Joint Labor-Management Taskforce on Employee Housing.

SECTION B:

Pursuant to the DPM, Part 1, Chapter 3 §301, the District provides a preference for District residents in employment. In order to encourage employees to live and work in the District of Columbia, a joint Labor-Management Task Force on Employee Housing was established during previous negotiations with Compensation Units 1 & 2. The Taskforce strives to inform employees of the programs currently available for home ownership in the District of Columbia. Additionally, the Taskforce collaborates with other government agencies including the Department of Housing and Community Development and the District's Housing Finance Agency to further affordable housing opportunities for bargaining unit employees, who have been employed by the District Government for at least one year.

SECTION C:

The parties agree that \$650,000.00 will be set aside to be used toward Negotiated employee Assistance Home Purchase Program (NEAHP) for the duration of the Agreement. If at any time the funds set aside have been depleted, the Parties will promptly convene negotiations to provide additional funds for the program.

SECTION D:

Any funds set aside in Fiscal Years 2022, 2023, 2024 and 2025 shall be available for expenditure in that fiscal year or any other fiscal year covered by the Compensation Units 1 and 2 Agreement. All funds set aside for housing incentives shall be expended or obligated prior to the expiration of the Compensation Units 1 and 2 Agreement for FY 2022 – FY 2025.

**ARTICLE 5
BENEFITS COMMITTEE**

SECTION A:

The parties agree to continue their participation on the District's Joint Labor-Management Benefits Committee for the purpose of addressing the benefits of employees in Compensation Units 1 and 2. The Benefits Committee shall meet quarterly, in January, April, July and October of each year.

SECTION B: RESPONSIBILITIES:

The Parties shall be authorized to consider all matters that concern the benefits of employees in Compensation Units 1 and 2 that are subject to mandatory bargaining between the parties. The Parties shall be empowered to address such matters only to the extent granted by the Unions in Compensation Units 1 and 2 and the District of Columbia Government. The parties agree to apply a system of expedited arbitration if necessary to resolve issues that are subject to mandatory bargaining. The Committee may, by consensus, discuss and consider other benefit issues that are not mandatory bargaining subjects.

SECTION C:

The Committee shall:

1. Monitor the quality and level of services provided to covered employees under existing Health, Optical and Dental Insurance Plans for employees in Compensation Units 1 and 2.
2. Recommend changes and enhancements in Health, Optical and Dental benefits for employees in Compensation Units 1 and 2 consistent with Chapter 6, Subchapter XXI of the D.C. Official Code (2001 ed.).
3. With the assistance of the Office of Contracting and Procurement, evaluate criteria for bids, make recommendations concerning the preparation of solicitation of bids and make recommendations to the contracting officer concerning the selection of providers following the receipt of bids, consistent with Chapter 4 of the D.C. Official Code (2001 ed.).

4. Following the receipt of bids to select health, dental, optical, life and disability insurance providers, the Union's Chief Negotiator shall be notified to identify no more than two individuals to participate in the RFP selection process.
5. Explore issues concerning the workers' compensation system that affect employees in Compensation Units 1 and 2 consistent with Chapter 6, Subchapter XXIII of the D.C. Official Code (2001 ed.).
6. The Union shall be notified of proposed benefit programs to determine the extent to which they impact employees in Compensation Units 1 and 2. Upon notification, the Union shall inform the Office of Labor Relations and Collective Bargaining within ten (10) calendar days to discuss any concerns it has regarding the impact on employees in Compensation Units 1 and 2.

ARTICLE 6 BENEFITS

SECTION A: LIFE INSURANCE:

1. Life insurance is provided to covered employees in accordance with §1-622.01, *et seq.* of the District of Columbia Official Code (2001 Edition) and Chapter 87 of Title 5 of the United States Code.

(a) District of Columbia Official Code §1-622.03 (2001 Edition) requires that benefits shall be provided as set forth in §1-622.07 to all employees of the District first employed after September 30, 1987, except those specifically excluded by law or by rule.

(b) District of Columbia Official Code §1-622.01 (2001 Edition) requires that benefits shall be provided as set forth in Chapter 87 of Title 5 of the United States Code for all employees of the District government first employed before October 1, 1987, except those specifically excluded by law or rule and regulation.

2. The current life insurance benefits for employees hired on or after October 1, 1987 are: The District of Columbia provides life insurance in an amount equal to the employee's annual salary rounded to the next thousand, plus an additional \$2,000. Employees are required to pay two-thirds (2/3) of the total cost of the monthly premium. The District Government shall pay one-third (1/3) of the total cost of the premium. Employees may choose to purchase additional life insurance coverage through the District Government. These additions to the basic coverage are set-forth in the schedule below:

Optional Plan	Additional Coverage	Premium Amount
Option A – Standard	Provides \$10,000 additional coverage	Cost determined by age
Option B – Additional	Provides coverage up to five times the employee's annual salary	Cost determined by age and employee's salary
Option C – Family	Provides \$5,000 coverage for the eligible spouse and \$2,500 for each eligible child.	Cost determined by age.

Employees must contact their respective personnel offices to enroll or make changes in their life insurance coverage.

SECTION B: HEALTH INSURANCE:

1. Pursuant to D.C. Official Code §1-621.02 (2001 Edition), all employees covered by this agreement and hired after September 30, 1987, shall be entitled to enroll in group health insurance coverage provided by the District of Columbia.

(a) Health insurance coverage shall provide a level of benefits comparable to the plan(s) provided on the effective date of this agreement. Benefit levels shall not be reduced during the term of this agreement except by mutual agreement of the District, representatives of Compensation Units 1 and 2 and the insurance carrier(s). District employees are required to execute an enrollment form in order to participate in this program.

(b) The District may elect to provide additional health care providers for employees employed after September 30, 1987, provided that such addition of providers does not reduce the current level of benefits provided to employees. Should the District Government decide to expand the list of eligible providers, the District shall give Compensation Units 1 & 2 representatives notice of the proposed additions.

(c) Employees are required to contribute 25% of the total premium cost of the employee's selected plan. The District of Columbia Government shall contribute 75% of the premium cost of the employee's selected plan.

2. Pursuant to D.C. Official Code §1-621.01 (2001 Edition), all District employees covered by this agreement and hired before October 1, 1987, shall be eligible to participate in group health insurance coverage provided through the Federal Employees Health Benefits Program (FEHB) as provided in Chapter 89 of Title 5 of the United States Code. This program is administered by United States Office of Personnel Management.

3. The plan descriptions shall provide the terms of coverage and administration of the respective plans. Employees and union representatives are entitled to receive a copy of the summary plan description upon request. Additionally, employees and union representatives are entitled to review copies of the actual plan description upon advance request.

SECTION C: OPTICAL AND DENTAL:

1. The District shall provide Optical and Dental Plan coverage at a level of benefits comparable to the plan(s) provided on the effective date of this agreement. Benefit levels shall not be reduced during the term of this agreement except by mutual agreement of the District, the Union and the insurance carrier(s). District employees are required to execute an enrollment form in order to participate in the Optical and Dental program.

2. The District may elect to provide additional Optical and/or Dental providers, provided that such addition of providers does not reduce the current level of benefits provided to employees. Should the District Government decide to expand the list of eligible providers, the District shall give Compensation Units 1 & 2 representatives notice of the proposed additions.

SECTION D: SHORT-TERM DISABILITY INSURANCE PROGRAM

Employees covered by this Agreement shall be eligible to enroll, at their own expense, in the District's Short-Term Disability Insurance Program, which provides for partial income replacement when employees are required to be absent from duty due to a non-work-related qualifying medical condition. Employees may use income replacement benefits under the program in conjunction with annual or sick leave benefits provided for in this Agreement.

SECTION E: ANNUAL LEAVE:

1. In accordance with D.C. Official Code §1-612.03 (2001 Edition), full-time employees covered by the terms of this agreement are entitled to:

(a) one-half (1/2) day (4 hours) for each full biweekly pay period for an employee with less than three years of service (accruing a total of thirteen (13) annual leave days per annum);

(b) three-fourths (3/4) day (6 hours) for each full biweekly pay period, except that the accrual for the last full biweekly pay period in the year is one and one-fourth days (10 hours), for an employee with more than three (3) but less than fifteen (15) years of service (accruing a total of twenty (20) annual leave days per annum); and,

(c) one (1) day (8 hours) for each full biweekly pay period for an employee with fifteen (15) or more years of service (accruing a total of twenty-six (26) annual leave days per annum).

2. Part-time employees who work at least 40 hours per pay period earn annual leave at one-half the rate of full-time employees.

3. Employees shall be eligible to use annual leave in accordance with the District of Columbia laws.

SECTION F: SICK LEAVE:

1. In accordance with District of Columbia Official Code §1-612.03 (2001 Edition), a full-time employee covered by the terms of this agreement may accumulate up to thirteen (13) sick days in a calendar year.

2. Part-time employees for whom there has been established in advance a regular tour of duty of a definite day or hour of any day during each administrative workweek of the biweekly pay period shall earn sick leave at the rate of one (1) hour for each twenty (20) hours of duty. Credit may not exceed four (4) hours of sick leave for 80 hours of duty in any pay period. There is no credit of leave for fractional parts of a biweekly pay period either at the beginning or end of an employee's period of service.

SECTION G: OTHER FORMS OF LEAVE:

1. **Military Leave:** An employee is entitled to leave, without loss of pay, leave, or credit for time of service as reserve members of the armed forces or as members of the National Guard to the extent provided in D.C. Official Code §1-612.03(m) (2001 Edition).

2. **Court Leave:** An employee is entitled to leave, without loss of pay, leave, or service credit during a period of absence in which he or she is required to report for jury duty or to appear as a witness on behalf of the District of Columbia Government, or the Federal or a state or local government to the extent provided in D.C. Official Code §1-612.03(l) (2001 Edition).

3. **Funeral Leave:**

a. An employee is entitled to three (3) days of leave, without loss of pay, leave, or service credit to make arrangements for or to attend the funeral or memorial service for an immediate relative. In addition, the Employer shall grant an employee's request for annual or compensatory time up to three (3) days upon the death of an immediate relative. Approval of additional time shall be at the Employer's discretion. However, requests for leave shall be granted unless the Agency's ability to accomplish its work would be seriously impaired.

b. For the purpose of this section “immediate relative” means the following relatives of the employee: an individual who is related to the employee by blood, marriage, adoption, or domestic partnership as father, mother, child, husband, wife, sister, brother, aunt uncle, grandparent, grandchild, or similar familial relationship; an individual for whom the employee is the legal guardian; or fiancé, fiancée, or domestic partner of the employee.

c. An employee is entitled to not more than three (3) days of leave, without loss of pay, leave, or service credit to make arrangements for or to attend the funeral or memorial service for a family member who died as a result of a wound, disease or injury incurred while serving as a member of the armed forces in a combat zone to the extent provided in D.C. Official Code §1-612.03(n) (2001 Edition).

SECTION H: PRE-TAX BENEFITS:

1. Employee contributions to benefits programs established pursuant to D.C. Official Code §1-611.19 (2001 ed.), including the District of Columbia Employees Health Benefits Program, may be made on a pre-tax basis in accordance with the requirements of the Internal Revenue Code and, to the extent permitted by the Internal Revenue Code, such pre-tax contributions shall not effect a reduction of the amount of any other retirement, pension, or other benefits provided by law.

2. To the extent permitted by the Internal Revenue Code, any amount of contributions made on a pre-tax basis shall be included in the employee's contributions to existing life insurance, retirement system, and for any other District government program keyed to the employee's scheduled rate of pay, but shall not be included for the purpose of computing Federal or District income tax withholdings, including F.I.C.A., on behalf of any such employee.

SECTION I: RETIREMENT:

1. CIVIL SERVICE RETIREMENT SYSTEM (CSRS): As prescribed by 5 U.S.C. §8401 and related chapters, employees first hired by the District of Columbia Government before October 1, 1987, are subject to the provisions of the CSRS, which is administered by the U.S. Office of Personnel Management. Under Optional Retirement the aforementioned employee may choose to retire when he/she reaches:

- (a) Age 55 and 30 years of service;
- (b) Age 60 and 20 years of service;
- (c) Age 62 and 5 years of service.

Under Voluntary Early Retirement, which must be authorized by the U.S. Office of Personnel Management, an employee may choose to retire when he/she reaches:

- (a) Age 50 and 20 years of service;
- (b) Any age and 25 years of service.

The pension of an employee who chooses Voluntary Early Retirement will be reduced by 2% for each year under age 55.

2. CIVIL SERVICE RETIREMENT SYSTEM: SPECIAL RETIREMENT PROVISIONS FOR LAW ENFORCEMENT OFFICERS:

Employees first hired by the District of Columbia Government before October 1, 1987, who are subject to the provisions of the CSRS and determined to be:

- (a) a “law enforcement officer” within the meaning of 5 U.S.C. §8331(20)(D);
and
- (b) eligible for benefits under the special retirement provision for law enforcement officers;

shall continue to have their retirement benefits administered by the U. S. Office of Personnel Management in accordance with applicable law and regulation.

3. DEFINED CONTRIBUTION PENSION PLAN:

Section A:

The District of Columbia shall continue the Defined Contribution Pension Plan currently in effect which includes:

- (1) All eligible employees hired by the District on or after October 1, 1987, are enrolled into the defined contribution pension plan.
- (2) As prescribed by §1-626.09(c) of the D.C. Official Code (2001 Edition) after the completion of one year of service, the District shall contribute an amount not less than 5% of their base salary to an employee’s Defined Contribution Pension Plan account. The District government funds this plan; there is no employee contribution to the Defined Contribution Pension Plan.
- (3) As prescribed by §1-626.09(d) of the D.C. Official Code (2001 Edition) the District shall contribute an amount not less than an additional .5% of a detention officer’s base salary to the same plan.
- (4) Compensation Units 1 and 2 Joint Labor Management Technical Advisory Pension Reform Committee
 - (a) Establishment of the Joint Labor-Management Technical Advisory Pension Reform Committee (JLMTAPRC or Committee)
 - (1) The Parties agree that employees should have the security of a predictable level of income for their retirement after a career in public service. In order to support the objective of providing retirement income for employees

hired on or after October 1, 1987, the District shall plan and implement an enhanced retirement program effective October 1, 2008. The enhanced program will consist of a deferred compensation component and a defined benefit component.

(2) Accordingly, the Parties agree that the JLMTAPRC is hereby established for the purpose of developing an enhanced retirement program for employees covered by the Compensation Units 1 and 2 Agreement.

(b) Composition of the JLMTAPRC

The Joint Labor-Management Technical Advisory Pension Reform Committee will be composed of six (6) members, three (3) appointed by labor and three (3) appointed by management, and the Chief Negotiators (or his/her designee) of Compensation Units 1 and 2. Appointed representatives must possess a pension plan background including but not limited to consulting, financial or actuarial services. In addition, an independent consulting firm with demonstrated experience in pension plans design and actuarial analysis will support the Committee.

(c) Responsibilities of the JLMTAPRC

The Committee shall be responsible to:

- Plan and design an enhanced retirement program for employees hired on or after October 1, 1987 with equitable sharing of costs and risks between employee and employer;
- Establish a formula cap for employee and employer contributions;
- Establish the final compensation calculation using the highest three-year consecutive average employee wages;
- Include retirement provisions such as disability, survivor and death benefits, health and life insurance benefits;
- Design a plan sustainable within the allocated budget;
- Draft and support legislation to amend the D.C. Code in furtherance of the "Enhanced Retirement Program."

(d) Duration of the Committee

The Committee shall complete and submit a report with its recommendations to the City Administrator for the District of Columbia within one hundred and twenty (120) days after the effective date of the Compensation Units 1 and 2 Agreement.

4. TIAA-CREF PLAN:

For eligible education service employees at the University of the District of Columbia hired by the University or a predecessor institution, the University will contribute an amount not less than seven percent (7%) of their base salary to the Teachers Insurance and Annuity Association College Retirement Equities Fund (TIAA-CREF).

SECTION J: HOLIDAYS:

1. As prescribed by D.C. Official Code §1-612.02 (2001 Edition) the following legal public holidays are provided to all employees covered by this agreement:

- (a) New Year's Day, January 1st of each year;
- (b) Dr. Martin Luther King, Jr.'s Birthday, the 3rd Monday in January of each year;
- (c) Washington's Birthday, the 3rd Monday in February of each year;
- (d) Emancipation Day, April 16th;
- (e) Memorial Day, the last Monday in May of each year;
- (f) Juneteenth, June 19th
- (g) Independence Day, July 4th of each year;
- (h) Labor Day, the 1st Monday in September of each year;
- (i) Indigenous Peoples' Day, the 2nd Monday in October of each year;
- (j) Veterans Day, November 11th of each year;
- (k) Thanksgiving Day, the 4th Thursday in November of each year;
and
- (l) Christmas Day, December 25th of each year.
- (m) Inauguration Day, January 20th of each 4th year

2. When an employee, having a regularly scheduled tour of duty is relieved or prevented from working on a day District agencies are closed by order of the Mayor, he or she is entitled to the same pay for that day as for a day on which an ordinary day's work is performed.

ARTICLE 7 OVERTIME

SECTION A: Overtime Work:

Hours of work authorized in excess of an employees assigned tour of duty in a day or forty (40) hours in a pay status in a work week shall be overtime work for which an employee shall receive either overtime pay or compensatory time unless the employee has used unscheduled leave during the forty (40) hour work week. The unscheduled leave rule will not apply when an employee has worked (back-to-back shifts) and takes unscheduled leave for an eight (8) hour period following the back-to-back shift or where an employee has indicated his/her preference not to work overtime and the Employer has

no other option but to order the employee to work overtime. Scheduled leave is leave requested and approved prior to the close of the preceding shift.

SECTION B: Compressed, Alternate and Flexible Schedules:

1. Compressed, Alternate and Flexible schedules may be jointly determined within a specific work area that modifies this overtime provision (as outlined in Section A of this Article) but must be submitted to the parties to this contract prior to implementation. This Agreement to jointly determine compressed schedules does not impact on the setting of the tour of duty.

2. When an employee works a Compressed, Alternate, and Flexible schedule, which generally means (1) in the case of a full-time employee, an 80-hour biweekly basic work requirement which is scheduled for less than 10 workdays, and (2) in the case of a part-time employee, a biweekly basic work requirement of less than 80 hours which is scheduled for less than 10 workdays, the employee would receive overtime pay or compensatory time for all hours in a pay status in excess of his/her assigned tour of duty, consistent with the 2004 District of Columbia Omnibus Authorization Act, 118 Stat. 2230, Pub. L. 108-386 Section (October 30, 2004).

3. The purpose of this Section is to allow for authorized Compressed, Alternate, and Flexible time schedules which exceed eight (8) hours in a day or 40 hours in a week to be deemed the employee's regular tour of duty, and not be considered overtime within the confines of the specific compressed work schedule and this Article. Bargaining unit members so affected would receive overtime or compensatory time for all hours in pay status in excess of their assigned tour of duty.

SECTION C:

Subject to the provisions of Section D of this Article, an employee who performs overtime work shall receive either pay or compensatory time at a rate of time and one-half (1-1/2) for each hour of work for which overtime is payable.

SECTION D:

Bargaining Unit employees shall receive overtime pay unless the employee and the supervisor mutually agree to compensatory time in lieu of pay for overtime work. Such mutual agreement shall be made prior to the overtime work being performed.

SECTION E:

Paramedics and Emergency Medical Services Technicians employed by the Fire and Emergency Medical Services Department and represented by the American Federation of Government Employees, Local 3721 shall earn overtime after they have worked 40 hours in a week.

ARTICLE 8

INCENTIVE PROGRAMS

PART I - SICK LEAVE INCENTIVE PROGRAM:

In order to recognize an employee's productivity through his/her responsible use of accrued sick leave, the Employer agrees to provide time-off in accordance with the following:

SECTION A:

A full time employee who is in a pay status for the full calendar leave year shall accrue annually:

1. Three (3) days off for utilizing a total of no more than two (2) days of accrued sick leave.
2. Two (2) days off for utilizing a total of more than two (2) but not more than four (4) days of accrued sick leave.
3. One (1) day off for utilizing a total of more than four (4) but no more than five (5) days of accrued sick leave.

SECTION B:

Employees in a non-pay status for no more than two (2) pay periods for the leave year shall remain eligible for incentive days under this Article. Sick leave usage for maternity or catastrophic illness/injury, not to exceed two (2) consecutive pay periods, shall not be counted against sick leave for calculating eligibility for incentive leave under this Article.

SECTION C:

Time off pursuant to a sick leave incentive award shall be selected by the employee and requested at least three (3) full workdays in advance of the leave date. Requests for time off pursuant to an incentive award shall be given priority consideration and the employee's supervisor shall approve such requests for time off unless staffing needs or workload considerations dictate otherwise. If the request is denied, the employee shall request and be granted a different day off within one month of the date the employee initially requested. Requests for time off shall be made on the standard "Application for Leave" form.

SECTION D:

All incentive days must be used in full-day increments following the leave year in which they were earned. The Employer will notify the employee of their sick leave incentive day(s) no later than March of each year. The incentive day(s) will also be credited to the employee's leave account no later than the end of April of each year. Incentive days may not

be substituted for any other type of absence from duty. There shall be no carryover or payment for any unused incentive days.

SECTION E:

Part-time employees are not eligible for the sick leave incentive as provided in this Article.

SECTION F:

This program shall be in effect in Fiscal Years 2022, 2023, 2024 and 2025.

PART II – PERFORMANCE INCENTIVE PILOT PROGRAM:

In order to recognize employees' productivity through their accomplishment of established goals and objectives, special acts toward the accomplishment of agency initiatives, demonstrated leadership in meeting agency program and/or project goals and/or the District's Strategic Plan initiatives, the Employer, in accordance with criteria established by the High Performance Workplace Committee agrees to establish pilot incentive programs within agencies, including time off without loss of pay or charge to leave as an incentive award. The District of Columbia Government Office of Labor Management Partnerships and the District of Columbia Incentive Awards Committee may serve as resources at the request of the parties in the implementation of the pilot incentive programs within agencies.

ARTICLE 9

CALL-BACK/CALL-IN/ON-CALL AND PREMIUM PAY

SECTION A: CALL-BACK

A minimum of four (4) hours of overtime, shall be credited to any employee who is called back to perform unscheduled overtime work on a regular workday after he/she completes the regular work schedule and has left his/her place of employment.

SECTION B: CALL-IN

1. When an employee is called in before his/her regular tour of duty to perform unscheduled overtime and there is no break before the regular tour is to begin, a minimum of two (2) hours of overtime shall be credited to the employee.

2. A minimum of four (4) hours of overtime work shall be credited to any employee who is called in when not scheduled and informed in advance, on one of the days when he/she is off duty.

SECTION C: ON-CALL

1. An employee may be required to be on call after having completed his/her regular tour of duty. The employer shall specify the hours during which the employee is on call; and shall compensate the employee at a rate of twenty-five percent (25%) of his/her basic rate of pay for each hour the employee is on call.

2. An employee is on-call when a determination has been made that the work of that position requires the employee to remain accessible and available to the point where his or her time cannot be used effectively for the employee's own personal purposes.

3. The employee's schedule must specify the hours during which he/she will be required to remain on-call. On call designation will be made on the form attached as Appendix 1.

SECTION D: HOLIDAY PAY

An employee who is required to work on a legal holiday falling within his or her regularly scheduled tour of duty, shall be paid at the rate of twice his or her regular basic rate of pay for not more than eight (8) hours of such work.

SECTION E: NIGHT DIFFERENTIAL

An employee shall receive night differential pay at a rate of ten percent (10%) in excess of their basic day rate of compensation when they perform night work on a regularly scheduled tour of duty falling between 6:00 p.m. and 6:00 a.m. Employees shall receive night differential in lieu of shift differential.

SECTION F: PAY FOR SUNDAY WORK

A full-time employee assigned to a regularly scheduled tour of duty, any part of which includes hours that fall between midnight Saturday and midnight Sunday, is entitled to Sunday premium pay for each hour of work actually performed which is not overtime work and which is not in excess of eight (8) hours for each tour of duty which begins or ends on Sunday. Sunday premium pay is computed as an additional twenty-five percent (25%) of the employee's basic rate of compensation.

SECTION G: ADDITIONAL INCOME ALLOWANCE FOR CHILD AND FAMILY SERVICES

1. The Additional Income Allowance (AIA) program within the Child and Family Services Agency (CFSA) which was established pursuant to the "Personnel Recruitment and Retention Incentives for Child and Family Services Agency Compensation System Changes Emergency Approval Resolution of 2001", Council Resolution 14-53 (March 23, 2001) and as contained in Chapter 11, Section 1154 of the District Personnel Manual,

“Recruitment and Retention Incentives – Child and Family Services Agency,” shall remain in full force and effect during the term of this Agreement.

2. The Administration of the AIA within CFSA shall be governed by the implementing regulations established in Child and Family Services Agency, Human Resources Administration Issuance System, HRA Instruction No. IV.11-3.
3. **OTHER SUBORDINATE AGENCIES WITH SIGNIFICANT RECRUITMENT AND RETENTION PROBLEMS**
Subordinate agencies covered by this Agreement may provide additional income allowances for positions that have significant recruitment and retention problems consistent with Chapter 11, Part B, Section 1143 of the District Personnel Manual.

ARTICLE 10 MILEAGE ALLOWANCE

SECTION A:

The parties agree that the mileage allowance established for the employees of the Federal Government who are authorized to use their personal vehicles in the performance of their official duties shall be the rate for Compensation Units 1 and 2 employees, who are also authorized in advance, by Management to use their personal vehicles in the performance of their official duties.

SECTION B:

To receive such allowance, authorization by Management must be issued prior to the use of the employee's vehicle in the performance of duty. Employees shall use the appropriate District Form to document mileage and request reimbursement of the allowance.

SECTION C:

1. Employees required to use their personal vehicle for official business if a government vehicle is not available, who are reimbursed by the District on a mileage basis for such use, are within the scope of the District of Columbia Non-Liability Act (D.C. Official Code §§2-411 through 2-416 (2001 Edition)). The Non-Liability Act generally provides that a District Employee is not subject to personal liability in a civil suit for property damage or for personal injury arising out of a motor vehicle accident during the discharge of the employee's official duties, so long as the employee was acting within the scope of his or her employment.

2. Claims by employees for personal property damage or loss incident to the use of their personal vehicle for official business if a government vehicle is not available

may be made under the Military Personnel and Civilian Employees Claim Act of 1964 (31 U.S.C. §3701 *et seq.*).

SECTION D:

No employee within Compensation 1 and 2 shall be required to use his/her personal vehicle unless the position vacancy announcement, position description or other pre-hire documentation informs the employee that the use of his/her personal vehicle is a requirement of the job.

SECTION E:

Employees required as a condition of employment to use their personal vehicle in the performance of their official duties may be provided a parking space or shall be reimbursed for non-commuter parking expenses, which are incurred in the performance of their official duties.

ARTICLE 11
ANNUAL LEAVE/COMPENSATORY TIME BUY-OUT

SECTION A:

An employee who is separated or is otherwise entitled to a lump-sum payment under personnel regulations for the District of Columbia Government shall receive such payment for each hour of unused annual leave or compensatory time in the employee's official leave record.

SECTION B:

The lump-sum payment shall be computed on the basis of the employee's rate at the time of separation in accordance with such personnel regulations.

ARTICLE 12
BACK PAY

Arbitration awards or settlement agreements in cases involving an individual employee shall be paid within sixty (60) days of receipt from the employee of relevant documentation, including documentation of interim earnings and other potential offsets. The responsible Agency shall submit the SF-52 and all other required documentation to the Department of Human Resources within thirty (30) days upon receipt from the employee of relevant documentation.

ARTICLE 13
DUTY STATION COVERAGE

The Fire and Emergency Medical Services employees and the correctional officers at the Department of Corrections and the Department of Youth Rehabilitative Services who are covered under Section 7(k) of the Fair Labor Standards Act shall be compensated a minimum of one hour pay if required to remain at his/her duty station beyond the normal tour of duty.

ARTICLE 14
GRIEVANCES

SECTION A:

This Compensation Agreement shall be incorporated by reference into local working conditions agreements in order to utilize the grievance/arbitration procedure in those Agreements to consider alleged violations of this Agreement.

SECTION B:

Grievances concerning compensation shall be filed with the appropriate agency and the Office of Labor Relations and Collective Bargaining under the applicable working conditions agreement. In the event a grievance alleges a violation affecting all members of Compensation Units 1 and 2, it will be sufficient to file the grievance directly with the Office of Labor Relations and Collective Bargaining within thirty (30) calendar days of knowledge of the alleged violation. Other than this possible variance in the filing deadline and receiving office, the applicable negotiated grievance procedure will remain in full force and effect.

ARTICLE 15
LOCAL ENVIRONMENT PAY

SECTION A:

Each department or agency shall eliminate or reduce to the lowest level possible all hazards, physical hardships, and working conditions of an unusual nature. When such action does not overcome the hazard, physical hardship, or unusual nature of the working condition, additional pay is warranted. Even though additional pay for exposure to a hazard, physical hardship, or unusual working condition is authorized, there is a responsibility on the part of a department or agency to initiate continuing positive action to eliminate danger and risk which contribute to or cause the hazard, physical hardship, or unusual working condition. The existence of pay for exposure to hazardous working

conditions or hardships in a local environment is not intended to condone work practices that circumvent safety laws, rules and regulations.

SECTION B:

Local environment pay is paid for actual exposure to (1) a hazard of an unusual nature which could result in significant injury, illness, or death, such as on a high structure when the hazard is not practically eliminated by protective facilities or an open structure when adverse conditions exist, e.g., darkness, lightning, steady rain, snow, sleet, ice, or high wind velocity; (2) a physical hardship of an unusual nature under circumstances which cause significant physical discomfort in the form of nausea, or skin, eye, ear or nose irritation, or conditions which cause abnormal soil of body and clothing, etc., and where such distress or discomfort is not practically eliminated.

Local environmental pay will only be paid to employees when the employee is in an active duty status. Local environmental pay will not be paid when an employee is on leave or teleworking.

SECTION C:

Employees as listed in Attachment 2, Approved Positions for Local Environmental Pay, of DCHR Instruction No. 11B-90, Premium Pay – Local and Environmental Pay, and any other employee including District Service (DS) employees as determined pursuant to Section D of this Article are eligible for environmental differentials.

SECTION D:

The determination as to whether additional pay is warranted for workplace exposure to environmental hazards, hardships or unusual working conditions may be initiated by an agency or labor organization in accordance with the provisions of DCHR Instruction No. 11B-90, Premium Pay – Local and Environmental Pay. The determination shall be issued by DCHR within ninety (90) calendar days of the submission of the request.

SECTION E:

Employees eligible for local environment pay under the terms of this Agreement shall be compensated as follows:

1. **Severe Exposure.** Employees subject to “Severe” exposure shall receive local environment pay equal to twenty seven percent (27%) of *the rate for RW 10, step 2 on the Compensation Unit 2 pay schedule*. The following categories of work are currently paid the rate for “severe” exposure:

- High Work

2. **Moderate Exposure.** Employees subject to “Moderate” exposure shall receive local environment pay equal to ten percent (10%) of *the rate for RW 10, step 2 on*

the Compensation Unit 2 pay schedule. The following categories of work are currently paid the rate for “moderate” exposure:

- Explosives and Incendiary Materials – High Degree Hazard
- Poison (Toxic Chemicals) – High Degree Hazard
- Micro Organisms – High Degree Hazard

3. **Low Exposure.** Employees subject to “Low” exposure shall receive local environment pay equal to five percent (5%) of *the rate for RW 10, step 2 on the Compensation Unit 2 pay schedule.* The following categories of work are currently paid the rate for “low” exposure:

- Dirty Work
- Cold Work
- Hot Work
- Welding Preheated metals
- Explosives and Incendiary Materials – Low Degree Hazard
- Poison (Toxic Chemicals) – Low Degree Hazard
- Micro Organisms – Low Degree Hazard

ARTICLE 16 NEWLY CERTIFIED BARGAINING UNITS

For units placed into a new compensation unit, working conditions or non-compensatory matters shall be negotiated simultaneous with negotiations concerning compensation. Where the agreement is for a newly certified collective bargaining unit assigned to an existing compensation unit, the parties shall proceed promptly to negotiate simultaneously any working conditions, other non-compensatory matters, and coverage of the compensation agreement. There should not be read into the new language any intent that an existing compensation agreement shall become negotiable when there is a newly certified collective bargaining unit. Rather, the intent is to require prompt negotiations of non-compensatory matters as well as application of compensation (e.g., when pay scale shall apply to the newly certified unit).

ARTICLE 17
TERM AND TEMPORARY EMPLOYEES

The District of Columbia recognizes that many temporary and term employees have had their terms extended to perform permanent services. To address the interests of current term and temporary employees whose appointments have been so extended over time and who perform permanent services, the District of Columbia and the Union representing the employees in Compensation Units 1 and 2 agree to the following:

SECTION A:

Joint labor-management committees established in each agency/program in the Compensation Units 1 and 2 collective bargaining agreement shall continue and will identify temporary and term employees whose current term and or temporary appointments extend through the term of this Agreement, and who perform permanent services in District agency programs.

SECTION B:

Each Agency and Local Union shall review all term appointments within the respective agencies to determine whether such appointments are made and maintained consistent with applicable law. The Union shall identify individual appointments it believes to be contrary to applicable law and notify the Agency. The Agency shall provide the Union reason(s) for the term or temporary nature of the appointment(s), where said appointments appear to be contrary to law. If an employee has been inappropriately appointed to or maintained in a temporary or term appointment, the Agency and the Union shall meet to resolve the matter.

SECTION C:

The agency shall convert bargaining unit temporary and term employees identified by the joint labor-management committees, who perform permanent services, who are in a pay status during the term of this Agreement, and are paid from appropriated funding to the career service..

SECTION D:

Prior to the end of the this Compensation Agreement, to the extent not inconsistent with District or Federal law and regulation, the District shall make reasonable efforts to convert to the career service temporary and term bargaining unit employees identified by the joint labor-management committees who perform permanent services, are in a pay status as of September 30, 2021, are full-time permanent positions, and are paid through intra-district funding or federal grant funding.

SECTION E:

Employees in term or temporary appointments shall be converted to permanent appointments, consistent with the D.C. Official Code.

SECTION F:

District agencies retain the authority to make term and temporary appointments as appropriate for seasonal and temporary work needs.

SECTION G:

A Joint-Labor Management Committee shall consist of one (1) representative from each national union comprising Compensation Units 1 and 2. The District shall appoint an equal number of representatives. The Committee will facilitate the implementation of this Article should difficulties arise in the Joint-Labor Management Committees set forth in Section A.

SECTION H:

District agencies will first post vacant career service positions internal to the Agency for bargaining unit term and temporary employees to apply and compete before posting the positions externally. There shall be no direct appointments.

**ARTICLE 18
ADMINISTRATIVE CLOSING**

SECTION A:

1. Employees designated as "Essential Employees" are those who work in critical District government operations that cannot be suspended or interrupted, even in the event of declared emergencies. "Essential Employees" must report to work as scheduled even when the government is administratively closed, during emergencies or other government closing. Once an employee has been notified by his/her employing agency that his/her position is designated as "Essential" no further notice is required as long as the employee continues to occupy the position designated "Essential".
2. Employees designated "Emergency Employees" are those who support certain critical government operations and functions necessary for the continuity of operations, including during declared emergencies. "Emergency Employees" may be required to work when a situation or condition occurs and result in early dismissal for other employees, government closing or during other emergencies.

Once an employee has been notified by his/her employing agency that his/her position is designated as "Emergency", the designation will remain in effect until the designation is terminated in writing.

3. As applicable, employees required to work when all other District Government employees are released for administrative closings, shall be compensated in accordance with the minimum standards established by the Fair Labor Standards Act, (FLSA), 29 U.S.C. § 2011, *et seq.*
4. As applicable, employees required to work when all other District Government employee are released as a result of an administrative closings shall be compensated, in addition to their regular pay, one hour for each hour worked during the administrative closing.

SECTION B:

The determination as to whether the employee receives overtime or compensatory time will be at the time employee's election which shall be made before the work is performed. When elected, employees required to work when all other District Government employees are released for administrative closing shall earn compensatory time on an hour for hour basis.

**ARTICLE 19
SAVINGS CLAUSE**

SECTION A:

Should any provisions of this Agreement be rendered or declared invalid by reason of any existing or subsequently enacted law or by decree of a court or administrative agency of competent jurisdiction, such invalidation shall not affect any other part or provision hereof. Where appropriate, the parties shall meet within 120 days to negotiate any substitute provision(s).

SECTION B:

The terms of this contract supersede any subsequently enacted D.C. laws, District Personnel Manual (DPM) regulations, or departmental rules concerning compensation covered herein.

**ARTICLE 20
DURATION**

This Agreement shall remain in full force and effect through September 30, 2025. On this ____ day of _____ 2022, and as witness the parties hereto have set their signature.

APPENDIX 1

Management's Proposal

7/26/10

INSERT DATE

Firstname Lastname

Position/Title

Department/Division

RE: On-Call Notification

Dear Mr./Ms. Lastname:

You are hereby notified that you shall be placed in an "on-call" status effective **On-Call Dates** between the hours of **Start AM/PM** and **End AM/PM**. During the aforementioned hours, you are required to be available to report for work within a **reasonable time (not to exceed two hours)**. You are expected to be available by phone for the duration of the "on-call" period. You are expected to answer when called or return a call from INSERT AGENCY management within a reasonable amount of time (not to exceed **30 minutes**).

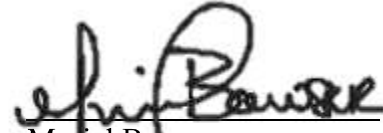
Sincerely,

SUPERVISOR/MANAGER NAME

SUPERVISOR POSITION/TITLE

APPROVAL

This collective bargaining agreement between the District of Columbia and Compensation Units 1 and 2, dated 05/14/2022, has been reviewed in accordance with Section 1-617.15 of the District of Columbia Official Code (2001 Ed.) and is hereby approved on this 14 day of May , 2022.



Muriel Bowser
Mayor

Compensation Units One and Two Collective Bargaining Agreement

On this 14 day of May, 2022, as witnesses the parties hereto have set their signatures.

**FOR THE DISTRICT OF COLUMBIA
GOVERNMENT**



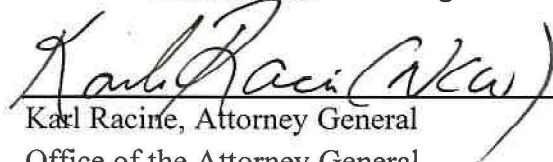
Lindsey Maxwell, Director
Office of Labor Relations and Collective
Bargaining



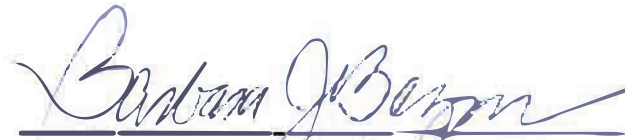
Asha Bryant, Esq., Chief of Staff
Office of Labor Relations and Collective
Bargaining



M. Colleen Currie, Chief Administrative Law
Judge
Office of Administrative Hearings



Karl Racine, Attorney General
Office of the Attorney General



Barbara J. Bazron, Ph.D., Director
Department of Behavioral Health

Brendolyn McCarty-Jones, Labor Liaison
Department of Behavioral Health

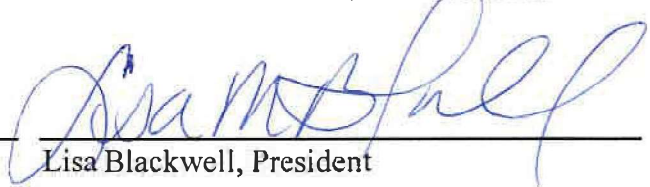
FOR THE LABOR UNIONS




Lee Blackmon, NAGE Chief Negotiator
Director, NAGE/SEIU, Federal Division

Robert Hollingsworth, AFSCME Chief
Negotiator
Executive Director, AFSCME Council 20

Ottis Johnson, AFGE Chief Negotiator
National Vice President, AFGE District 14




Lisa Blackwell, President
AFGE Local 1000



Stanley Freeman, President
AFGE Local 1975




Kermit Johnson, President
AFGE Local 2725




James Battle, President
AFGE Local 2741

Dr. Robert Holman, Medical Director
Fire and Emergency Medical Services
Department




Debbie Knox, President
NAGE Local R3-07

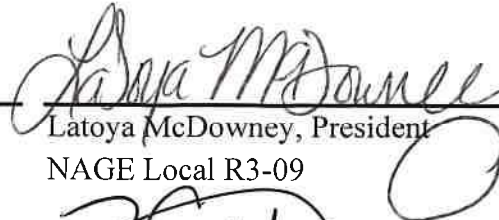

India Daniels, Labor Liaison
Fire and Emergency Medical Services
Department



Lisa White, President
NAGE Local R3-08

Dory Peters


David Do, Director (Interim)
Department of For-Hire Vehicles



Latoya McDowney, President
NAGE Local R3-09



Anthony Crispino, Interim Director
Department of Forensic Sciences



Perlieshia Gales, President
NAGE Local R3-11

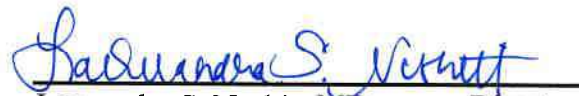
Keith A. Anderson, Director
Department of General Services

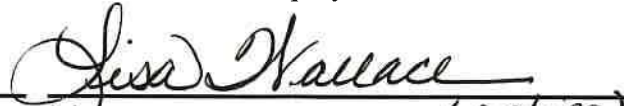


Wanda Shelton-Martin, President Executive Director
NUCHHCE 1199
NUHCE, 1199 DC, AFSCME

Ronald Thaxton, Labor Liaison
Department of General Services

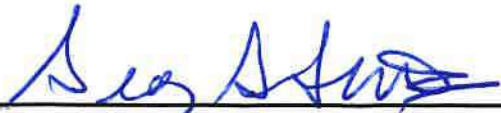
Larry Doggette, President
Public Service Employees Local 572



Laquandra S. Nesbitt MD, MPH, Director
Department of Health

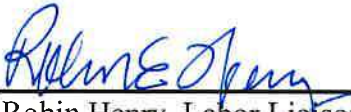

Lisa Wallace, Vice President (Acting)
SEIU 1199

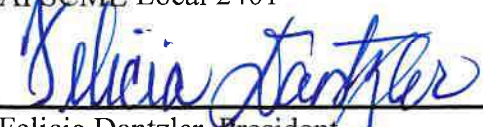
David Memnon, Labor Liaison
Department of Health


John Gibson, President
Teamsters Local 639



George Schutter, Chief Procurement Officer
Office of Contracting and Procurement



Wayne Enoch, President
AFSCME Local 2401


Robin Henry, Labor Liaison
Office of Contracting and Procurement



Felicia Dantzer, President
AFSCME Local 2743

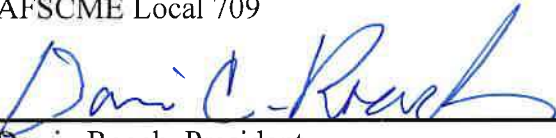

Thomas N. Faust, Director
Department of Corrections

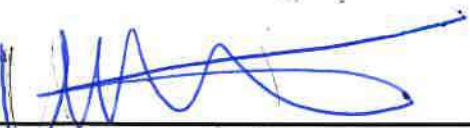

Alfred Barnes, President
AFSCME Local 2776



Paulette Johnson, Labor Liaison
Department of Corrections

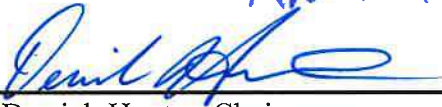

Debra Walker, President
AFSCME Local 709


Andrew Reese, Director
Department on Disability Services


Darrin Roach, President
AFSCME Local 877


Unique N. Morris-Hughes, Director
Department of Employment Services

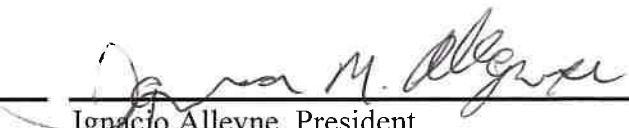

Joseph Alexander, Chairperson
FOP-Corrections *NWAIZUGBO. LIVINUS*


Derrick Hunter, Chairperson
FOP-DC Protective Services

Tracey Langley, Labor Liaison
Department of Employment Services

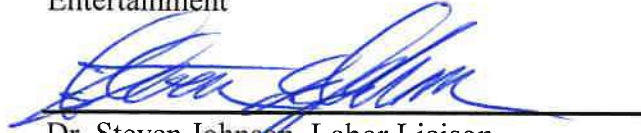

Regina Robinson, Chairperson
FOP-DYRS

Tommy Wells, Director
Department of Energy and Environment


Ignacio Alleyne, President
NAGE Local R3-05

S | 

Angie M. Gates, Director
Office of Cable Television, Film, Music and
Entertainment



Dr. Steven Johnson, Labor Liaison
Office of Cable Television, Film, Music and
Entertainment

Lindsey Parker, Director
Office of the Chief Technology Officer

Pamela Brown, Esq., General Counsel
Office of the Chief Technology Officer



Robert L. Matthews, Director
Child and Family Services Agency



Allison Fax, Labor Liaison
Child and Family Services Agency

Ernest Chrappah, Director
Department of Consumer and Regulatory
Affairs



Donald Tatum, Labor Liaison
Department of Consumer and Regulatory
Affairs

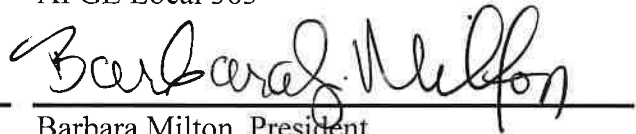
Carrol Ward, President
AFGE Local 2978



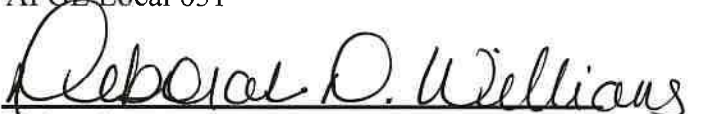
Aretha Lyles, President
AFGE Local 3721



Kenneth Pitts, President
AFGE Local 383



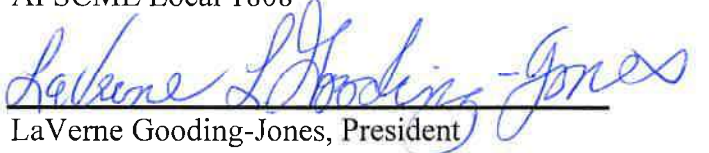
Barbara Milton, President
AFGE Local 631



Deborah Williams, President
AFSCME Local 1200



Mathew Williams, President
AFSCME Local 1808



LaVerne Gooding-Jones, President
AFSCME Local 2087

Kevin Hooks, President
AFSCME Local 2092

Dr. Christopher Rodriguez, Director
Homeland Security and Emergency
Management Agency



Ritchie Brooks, President
Teamsters Local 730

Drew Hubbard, Interim Director
Department of Housing and Community
Development



Kevin Pogue
AFSCME local 2091

Hnin Khaing, Director
Office of Human Rights

Ayanna Lee, Labor Liaison
Office of Human Rights



Laura Green Zeilinger, Director
Department of Human Services

Tammyjo Scriven, Labor Liaison
Department of Human Services

Karima Morris Woods, Commissioner
Department of Insurance, Securities, and
Banking

Katrice Purdie, Labor Liaison
Department of Insurance, Securities, and
Banking



Michael A. Carter, Director
Department of Public Works



Jerome Williams, Labor Liaison
Department of Public Works



Jed Ross, Chief Risk Officer
Office of Risk Management




Dr. Christina Grant, State Superintendent of
Education
Office of the State Superintendent of
Education

Quiyana Hall, Labor Liaison
Office of the State Superintendent of
Education



Everett Lott, Director
Department of Transportation

Leah Brown, Labor Liaison
Department of Transportation



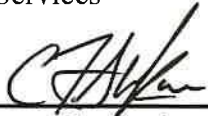
Karima Holmes, Director
Office of Unified Communications



Ingrid Jackson, Labor Liaison
Office of Unified Communications



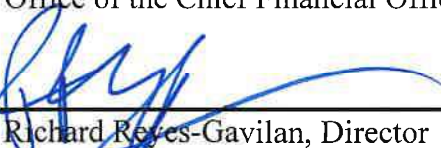
Hilary Cairns
Department of Youth and Rehabilitation
Services



Trey Stanback, Labor Liaison
Department of Youth and Rehabilitation
Services

Fitzroy Lee, Acting Chief Financial Officer
Office of the Chief Financial Officer

LaSharn Moreland, Labor Liaison
Office of the Chief Financial Officer



Richard Reyes-Gavilan, Director
DC Public Library

Veronica Ahern, Executive Director
Public Service Commission


Richard Beverly, Labor Liaison
Public Service Commission

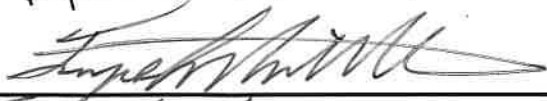


Ronald Mason, Jr., J.D., President
University of the District of Columbia

Wayne Turnage, Director
Department of Health Care Finance


Felicia Rothchild, Labor Liaison
Department of Health Care Finance



Jessica Gray, Labor Liaison / Human Capital Administrator
Department on Disability Services


TANYA L. MITCHELL
LABOR LIAISON
HOMELAND SECURITY AND
EMERGENCY MANAGEMENT
AGENCY

Gabriel Robinson, Director
Department of Motor Vehicles


Odessa Nance, Labor Liaison
Department of Motor Vehicles


Robert J. Contee III, Police Chief
Metropolitan Police Department


Mark Viehmeyer, Labor Liaison
Metropolitan Police Department

Delano Hunter, Director
Department of Parks and Recreation

Amy Caspari, Labor Liaison
Department of Parks and Recreation


Anita Cozart, Interim Director
Office of Planning

Sandra Harp, Labor Liaison
Office of Planning

Lewis D. Ferebee, Chancellor
District of Columbia Public Schools

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8

Position Number	Title	Hire Date	Vacant			Salary	FTE x Dist %	Fund	Program	CostCenter	Prgrm 2	Position Deptid	Department Name	Reg/Temp/
			Status	Grade	Step									Term
00000046	Senior Operating Budget Analyst	11/27/2017	F	13	1	106763	1	1010001	200032	20003	3000 - OBP	AT11000000	Budget and Planning	Reg
00000048	Operations Management Specialist	7/20/1998	F	13	10	137565	1	1010001	100070	20048	6000 - OCIO	AT16000000	Chief Inform Officer - SOAR	Reg
00000081	IT Project Manager	5/27/2008	F	14	10	162564.9	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00000108	Auditor	12/18/2023	F	13	8	130720	1	1010001	100100	20026	8000 - OIO	AT13000000	Integrity & Oversight	Reg
00000112	Assistant General Counsel	10/15/2007	F	15	10	190823	1	1010001	100093	20031	5000 - OTR	AT18020000	Tax & Revenue - GC	Reg
00000114	Information Technology Specialist	1/4/2010	F	14	10	162565	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00000180	Accountant	11/12/2019	F	12	5	104168	1	1010001	200028	20033	5000 - OTR	AT18030000	Tax & Revenue - RAA	Reg
00000222	Executive Accounting Advisor (10/16/2006	F	15	7	176605	1	1010001	200024	20019	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00000321	Associate Treasurer Asset Man	12/5/2022	F	16	4	193927	1	1010001	200094	20017	7000 - OFT	AT15000000	Finance & Treasury	Reg
00000344	Information Technology Specialist	9/30/2019	F	14	10	162565	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00000364	Fiscal Analyst	5/7/2001	F	15	10	190823	1	1010001	200036	20030	4000 - ORA	AT17000000	Revenue Analysis	Reg
00000388	Supervisory Appraiser	4/13/2009	F	14	6	146393	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00000390	Information Technology Manager	6/2/2025	F	15	10	190823	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00000399	Customer Service Representative	10/24/2022	F	08	10	72721	IA	1010001	700320	70440	7000 - OFT	AT15000000	Finance & Treasury	Reg
00000496	Returns Processing Clerk	1/29/2001	F	07	10	67548	1	1010001	200055	20034	5000 - OTR	AT18064000	Tax & Revenue - RPA	Reg
00000501	Appraiser		V	13	0	106763	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	
00000549	Unit Manager (Operations)	12/9/2019	F	13	5	120452	1	1010001	100029	20035	5000 - OTR	AT18120000	Tax & Revenue - RPTA	Reg
00000755	Tax Examining Technician	3/3/1997	F	09	10	80032	1	1010001	200055	20034	5000 - OTR	AT18061000	Tax & Revenue - RPA	Reg
00000846	Senior Criminal Investigator	1/22/2008	F	14	9	158522	1	1010001	100095	20027	8000 - OIO	AT13000000	Integrity & Oversight	Reg
00000894	Operating Budget Analyst	6/11/2018	F	11	4	82111	1	1010001	200032	20003	3000 - OBP	AT11000000	Budget and Planning	Reg
00000899	Director Internal Security	12/5/2011	F	15	10	190823	1	1010001	100095	20027	8000 - OIO	AT13000000	Integrity & Oversight	Reg
00001124	Auditor (Tax)		V	12	1	92656	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	
00001150	Auditor (Tax)		V	12	0	92656	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	
00001227	Tax Specialist	7/9/2007	F	09	10	80032	1	1010001	200058	20037	5000 - OTR	AT18014000	Tax & Revenue - CO	Reg
00001239	Senior Criminal Investigator	8/2/2010	F	14	9	158522	1	1010001	100095	20027	8000 - OIO	AT13000000	Integrity & Oversight	Reg
00001242	Information Technology Specialist	12/9/2019	F	14	10	162565	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00001285	HR Program Manager Training a	2/26/2024	F	14	9	158522	1	1060020	100148	20043	1000 - MGMT	AT11100000	Office of Human Resources	Reg
00001429	Real Property Program Specialist	5/26/2009	F	12	8	112802	1	1010001	200054	20035	5000 - OTR	AT18120000	Tax & Revenue - RPTA	Reg
00001498	Revenue Officer	12/22/1997	F	11	10	96547	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00001546	Operating Budget Analyst	2/27/2023	F	12	10	118558	1	1010001	200032	20003	3000 - OBP	AT11000000	Budget and Planning	Reg
00001634	Revenue Officer	1/18/2000	F	11	10	96547	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00001717	Lead Criminal Investigator	5/5/2014	F	14	10	168227	1	1010001	200058	20037	5000 - OTR	AT18014000	Tax & Revenue - CO	Reg
00001757	Senior Auditor (Tax)	7/20/2009	F	13	5	120451	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00001765	Investigator	4/17/2018	F	13	10	137565	1	1010001	100095	20027	8000 - OIO	AT13000000	Integrity & Oversight	Reg
00001767	Change Management Manager	1/27/2025	F	13	10	137565	1	1010001	200024	20024	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00001796	Pension Manager	10/7/2002	F	13	10	137565	1	1060020	200004	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00001812	Supervisory Appraiser	4/5/1982	F	14	10	162565	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00001824	Controller	6/22/1998	F	15	10	190823	1	1010001	150002	20047	100F - FinOps	AT12000000	Mgmt & Admin/Fin Ops	Reg
00001937	Supervisory Auditor (Tax)		V	14	0	126178	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	
00002055	Revenue Operations Manager	8/1/2022	F	14	2	130221	1	1010001	200076	20013	7000 - OFT	AT15000000	Finance & Treasury	Reg
00002314	Appraiser	1/14/2002	F	13	10	137561	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00002375	Contract Specialist	4/14/2008	F	13	10	137565	1	1060105	100022	20045	1000 - MGMT	AT12000000	Mgmt & Admin/Fin Ops	Reg
00002534	Unclaimed Property Supervisor	2/4/2019	F	13	10	137565	1	1060086	200060	20016	7000 - OFT	AT15000000	Finance & Treasury	Reg
00002543	Chief of Staff	8/14/2000	F	18	10	258032	1	1010001	100151	20040	1000 - MGMT	AT10000000	Executive Office	Reg
00002565	Criminal Investigator	3/26/2000	F	13	10	142386	1	1010001	200058	20037	5000 - OTR	AT18014000	Tax & Revenue - CO	Reg
00002641	Accounting Officer	6/29/2015	F	14	5	142350	1	1010001	200016	20022	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00002653	Supervisory Revenue Officer	11/23/2020	F	13	10	137565	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00002690	HR Business Partner	12/9/2019	F	13	8	130720	1	1060020	100060	20042	1000 - MGMT	AT11100000	Office of Human Resources	Reg
00002710	Treasurer	7/27/2015	F	18	4	240925	1	1010001	100151	20006	7000 - OFT	AT15000000	Finance & Treasury	Reg
00002757	IT Specialist (APPSW)	10/2/2017	F	14	10	162565	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00002901	Supervisor Criminal Investigat	5/22/2023	F	15	10	190823	1	1010001	200058	20037	5000 - OTR	AT18160000	Tax & Revenue - CO	Reg
00002960	Senior Financial Manager and P	10/26/1998	F	14	10	162565	1	1010001	100151	20006	7000 - OFT	AT15000000	Finance & Treasury	Reg
00002975	Assistant General Counsel	8/4/2008	F	15	10	190823	1	1010001	100092	20044	1000 - MGMT	AT10000000	Executive Office	Reg
00003296	Senior Operating Budget Analyst	1/17/2012	F	13	6	123874	1	1010001	200032	20003	3000 - OBP	AT11000000	Budget and Planning	Reg
00003369	Executive Dir Integ Oversight	10/6/2014	F	17	7	225100	1	1010001	100095	20027	8000 - OIO	AT13000000	Integrity & Oversight	Reg
00003385	Financial Reporting and Contro	11/9/2009	F	15	7	176605	1	1010001	200016	20023	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg

00003412	Senior Auditor (Tax)	1/21/2009	F	13	8	130717	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00003540	Unclaimed Property Manager	10/7/2013	F	14	9	158522	1	1060086	200060	20016	7000 - OFT	AT15000000	Finance & Treasury	Reg
00003542	Senior Cost Analyst	4/13/2009	F	14	9	158522	1	1010001	200029	20005	3000 - OBP	AT11000000	Budget and Planning	Reg
00003650	Pension Benefits Officer	10/12/2021	F	14	6	146393	1	1060038	200007	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00003681	Customer Service Tax Specialis	1/3/2023	F	09	3	66130	1	1010001	100029	20039	5000 - OTR	AT18200000	Tax & Revenue - CSA	Reg
00003710	Special Pay Analyst	8/17/1998	F	11	10	96547	1	1060020	200004	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00003712	Support Services Assistant	8/4/1997	F	08	10	72721	1	1010001	100109	20046	1000 - MGMT	AT12000000	Mgmt & Admin/Fin Ops	Reg
00003777	IT Specialist (APPSW)	8/12/2013	F	14	10	162565	1	1010001	100070	20048	6000 - OCIO	AT16000000	Chief Inform Officer - SOAR	Reg
00003782	Appraiser	9/25/2000	F	13	10	137561	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00003798	Accounting Technician	8/31/2020	F	08	5	63711	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00003816	Assistant General Counsel	1/25/1993	F	15	10	190823	1	1010001	100093	20031	5000 - OTR	AT18020000	Tax & Revenue - GC	Reg
00003883	Accounting Technician	12/18/2023	F	07	4	56820	1	1010001	200054	20035	5000 - OTR	AT18120000	Tax & Revenue - RPTA	Reg
00003887	Financial Analyst	5/7/2001	F	14	10	162565	1	1010001	200078	20008	7000 - OFT	AT15000000	Finance & Treasury	Reg
00003938	Revenue Officer	4/10/2000	F	11	10	96547	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00003965	Appraiser	2/26/2024	F	12	2	95534	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00004147	Management Analyst	10/1/1994	F	12	10	118558	1	1010001	200016	20023	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00004269	Quality Assurance Specialist	6/6/2022	F	11	4	82111	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00004304	Staff Assistant	9/16/1996	F	11	10	96547	1	1010001	200016	20022	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00004322	Pension Benefits Specialist	10/24/2022	F	11	8	91735	1	1060038	200007	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00004343	Appraiser	7/10/2017	F	12	10	118558	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00004608	Appraiser	9/25/2023	F	13	9	134139	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00004611	Information Technology Manager	10/16/2006	F	15	10	190823	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00004614	Payroll Operations Manager	11/8/1999	F	13	6	123874	1	1060020	200004	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00004636	Appraiser	5/8/2000	F	12	9	115680	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00004683	Appraiser	11/13/2007	F	12	10	118558	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00004734	Executive Assistant	1/4/1998	F	13	10	137565	1	1010001	100151	20029	4000 - ORA	AT17000000	Revenue Analysis	Reg
00004801	Customer Service Tax Specialis	3/21/2016	F	09	6	72088	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00004821	Program Analyst	5/14/2007	F	13	10	137565	1	1010001	200055	20034	5000 - OTR	AT18060000	Tax & Revenue - RPA	Reg
00004885	Tax Examining Technician	2/12/2001	F	09	8	76060	1	1010001	200055	20034	5000 - OTR	AT18061000	Tax & Revenue - RPA	Reg
00004888	Audit Manager	2/4/2019	F	14	10	162565	1	1010001	100100	20026	8000 - OIO	AT13000000	Integrity & Oversight	Reg
00004905	Contract Specialist	4/18/2016	F	13	6	123874	1	1060105	100022	20045	1000 - MGMT	AT12000000	Mgmt & Admin/Fin Ops	Reg
00004988	Payroll Technician		V	07	0	51456	1	1060020	200004	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00004992	Debt Policy Advisor	1/19/2021	F	15	6	171867	1	1010001	200078	20009	7000 - OFT	AT15000000	Finance & Treasury	Reg
00005056	Investigator	1/6/2020	F	13	6	123874	1	1010001	100095	20027	8000 - OIO	AT13000000	Integrity & Oversight	Reg
00005079	Budget Officer	8/7/2000	F	14	8	154479	1	1010001	150003	20047	100F - FinOps	AT12000000	Mgmt & Admin/Fin Ops	Reg
00005084	Management and Program Analyst		V	12	0	92656	1	1010001	200055	20034	5000 - OTR	AT18060000	Tax & Revenue - RPA	Reg
00005147	Payroll Technician	1/24/1994	F	09	10	80032	1	1060020	200004	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00005167	Financial Manager	2/11/2013	F	14	6	146393	1	1060090	200092	20017	7000 - OFT	AT15000000	Finance & Treasury	Reg
00005189	Supervisory Appraiser	11/4/1985	F	14	10	162565	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00005202	Customer Service Tax Specialis	7/9/2018	F	09	6	72088	1	1010001	100029	20039	5000 - OTR	AT18200000	Tax & Revenue - CSA	Reg
00005208	Senior Tax Advisor	6/1/1982	F	15	10	190823	1	1010001	100093	20031	5000 - OTR	AT18020000	Tax & Revenue - GC	Reg
00005231	Senior Accountant	3/7/2016	F	13	6	123873	1	1010001	200028	20033	5000 - OTR	AT18030000	Tax & Revenue - RAA	Reg
00005239	Senior Systems Accountant	1/25/1988	F	13	10	137561	1	1010001	200028	20033	5000 - OTR	AT18030000	Tax & Revenue - RAA	Reg
00005271	Audit Manager	12/27/2004	F	14	10	162565	1	1010001	100100	20026	8000 - OIO	AT13000000	Integrity & Oversight	Reg
00005273	Information Technology Special	3/1/2021	F	14	8	154479	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00005289	Accounting Manager	7/5/2011	F	14	7	150436	1	1010001	200016	20023	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00005349	Administrative Specialist	10/8/2000	F	11	9	94141	1	1010001	200040	20020	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00005374	Auditor	6/3/2013	F	13	6	123874	1	1010001	100100	20026	8000 - OIO	AT13000000	Integrity & Oversight	Reg
00005478	Auditor		V	13	0	122164	1	1010001	100100	20026	8000 - OIO	AT13000000	Integrity & Oversight	Reg
00005533	Director Internal Audit	3/3/1997	F	15	10	190823	1	1010001	100100	20026	8000 - OIO	AT13000000	Integrity & Oversight	Reg
00005536	Quality Controls Specialist	8/31/2008	F	12	7	109924	1	1060020	200004	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00005594	Customer Service Specialist	1/13/1992	F	09	10	80032	1	1010001	100029	20039	5000 - OTR	AT18202000	Tax & Revenue - CSA	Reg
00005621	Information Technology Special	4/26/2010	F	14	10	162565	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00005660	Recordation Tax Specialist	3/26/2001	F	11	8	91735	1	1010001	200053	20036	5000 - OTR	AT18150000	Tax & Revenue - RPTA	Reg
00005740	Revenue Officer	8/28/2000	F	11	10	96547	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00005761	Fiscal Analyst	11/9/2009	F	15	7	176605	1	1010001	200043	20030	4000 - ORA	AT17000000	Revenue Analysis	Reg
00005763	Payroll Technician	4/24/2023	F	08	9	70919	1	1060020	200004	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00005776	Tax Examining Technician	8/7/2017	F	09	4	68116	1	1010001	200055	20034	5000 - OTR	AT18064000	Tax & Revenue - RPA	Reg
00005822	Tax Examining Technician	8/21/2006	F	09	9	78046	1	1010001	200055	20034	5000 - OTR	AT18061000	Tax & Revenue - RPA	Reg

00005857	Information Technology Special		V	14	0	126178	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	
00005917	Senior Revenue Accounting Spec	11/13/2007	F	13	6	123873	1	1010001	200028	20033	5000 - OTR	AT18030000	Tax & Revenue - RAA	Reg
00005926	Senior Auditor (Tax)	4/22/2002	F	13	10	137561	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00005932	Accountant (Senior Advisor for	4/13/1998	F	14	10	162565	1	1010001	200028	20033	5000 - OTR	AT18030000	Tax & Revenue - RAA	Reg
00005980	Supervisory Appraiser	6/1/2015	F	14	10	162565	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00006021	Payroll Specialist	3/14/2022	F	09	5	70102	1	1060020	200004	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00006101	Unclaimed Property Technician	1/6/2020	F	08	5	63711	1	1060086	200060	20016	7000 - OFT	AT15000000	Finance & Treasury	Reg
00006155	Tax Fraud Specialist	10/7/2013	F	12	6	107046	1	1010001	200058	20037	5000 - OTR	AT18014000	Tax & Revenue - CO	Reg
00006170	Senior Operating Budget Analys	2/1/2021	F	13	8	130720	1	1010001	200032	20003	3000 - OBP	AT11000000	Budget and Planning	Reg
00006191	Accounting Technician	8/18/1986	F	09	10	80032	1	1010001	200016	20022	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00006217	Administrative Assistant	3/3/1997	F	11	10	96554	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00006339	Director IT Operations (PMO &	11/9/2020	F	16	7	210908	1	1010001	100070	20048	6000 - OCIO	AT16100000	Chief Inform Officer - PPS	Reg
00006345	Accountant	3/15/1999	F	13	10	137565	1	1010001	200016	20022	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00006353	Returns Processing Clerk	10/1/1997	F	07	10	67548	1	1010001	200055	20034	5000 - OTR	AT18064000	Tax & Revenue - RPA	Reg
00006379	Information Technology Special	12/19/2011	F	12	9	115680	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00006435	Payroll Operations Manager	2/25/2002	F	13	3	113607	1	1060038	200007	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00006436	HR Supervisor Recruitment & A	7/17/2017	F	14	6	146393	1	1060020	100060	20042	1000 - MGMT	AT11100000	Office of Human Resources	Reg
00006456	Tax Examining Technician	2/2/1998	F	09	10	80032	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00006620	Operating Budget Analyst	11/22/2021	F	09	5	70102	1	1010001	200032	20003	3000 - OBP	AT11000000	Budget and Planning	Reg
00006696	Senior Auditor (Tax)	7/1/2013	F	13	5	120451	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00006756	Management Analyst	1/8/2005	F	13	10	137561	1	1010001	200058	20037	5000 - OTR	AT18160000	Tax & Revenue - CO	Reg
00006772	Contracts Coordinator	7/17/2023	F	11	5	84518	1	1010001	100022	20045	1000 - MGMT	AT12000000	Mgmt & Admin/Fin Ops	Reg
00006794	Appraiser	11/4/2013	F	13	7	127295	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00006795	Deputy Chief Financial Officer	12/6/2021	F	18	4	240925	1	1010001	200040	20019	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00006828	Supervisory Customer Service S	4/8/2013	F	13	10	137565	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00006860	Customer Service Tax Specialis	4/25/2022	F	09	1	62158	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00006917	Debt Manager	1/11/2016	F	13	7	127297	1	1010001	200078	20008	7000 - OFT	AT15000000	Finance & Treasury	Reg
00006919	Assessment Program Coordinator	6/16/2014	F	11	7	89329	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00006986	Financial Reporting and Accoun	1/3/2022	F	14	10	162565	1	1010001	200016	20023	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00007028	Fiscal Analyst	10/22/2000	F	15	10	190823	1	1010001	200034	20028	4000 - ORA	AT17000000	Revenue Analysis	Reg
00007196	Appraiser	4/13/2020	F	12	3	98412	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00007223	IT Specialist	5/22/2023	F	12	1	92656	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00007295	Cluster Accounting Analyst	2/7/2016	F	14	7	150436	1	1010001	200016	20022	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00007467	IT Specialist (SYSADMIN) & (NE	7/20/1997	F	14	10	162565	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00007515	Supervisory Returns Processing	3/19/2007	F	12	10	118558	1	1010001	200055	20034	5000 - OTR	AT18064000	Tax & Revenue - RPA	Reg
00007546	Program Analyst	5/12/1997	F	12	10	118558	1	1010001	100029	20039	5000 - OTR	AT18200000	Tax & Revenue - CSA	Reg
00007550	Quality Controls Specialist	11/28/2016	F	12	9	115680	1	1060020	200004	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00007569	Returns Processing Assistant	8/16/2021	F	07	5	58608	1	1010001	200055	20034	5000 - OTR	AT18064000	Tax & Revenue - RPA	Reg
00007699	Executive Assistant	10/22/2001	F	13	10	137565	1	1010001	100092	20044	1000 - MGMT	AT10000000	Executive Office	Reg
00007705	Auditor	6/9/1997	F	13	10	137565	1	1010001	100100	20026	8000 - OIO	AT13000000	Integrity & Oversight	Reg
00007720	Revenue Accounting Manager	10/1/1994	F	15	10	190823	1	1010001	200028	20033	5000 - OTR	AT18030000	Tax & Revenue - RAA	Reg
00007802	Tax Fraud Specialist		V	12	0	92656	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	
00007807	Supervisory Auditor (Complianc	3/5/2018	F	15	8	181345	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00007841	Customer Service Specialist	10/27/2014	F	09	7	74074	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00007844	Senior Auditor (Tax)	5/30/2017	F	13	4	117029	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00007878	Senior Operating Budget Analys	4/21/2025	F	13	10	137565	1	1010001	200032	20003	3000 - OBP	AT11000000	Budget and Planning	Reg
00007879	Contract Specialist	5/25/1997	F	13	10	137565	1	1010001	100022	20045	1000 - MGMT	AT12000000	Mgmt & Admin/Fin Ops	Reg
00007923	Recordation Tax Specialist	9/5/2017	F	11	3	79705	1	1010001	200053	20036	5000 - OTR	AT18150000	Tax & Revenue - RPTA	Reg
00007937	Supervisory Returns Processing		V	10	1	68189	1	1010001	200055	20034	5000 - OTR	AT18064000	Tax & Revenue - RPA	
00007989	Payroll Business Analyst		V	12	1	92664	1	1060020	200004	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	
00008002	Director Financial Analysis a	10/31/2016	F	16	5	199588	1	1010001	200029	20005	3000 - OBP	AT11000000	Budget and Planning	Reg
00008004	Public Affairs Specialist	3/28/2022	F	13	4	117029	1	1010001	100151	20031	5000 - OTR	AT18010000	Tax & Revenue - DCFO	Reg
00008005	Appraiser	3/24/2014	F	12	1	92656	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00008023	Information Technology Special	2/6/2006	F	13	10	137561	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00008252	Accountant	11/4/2013	F	12	7	109924	1	1060086	200060	20016	7000 - OFT	AT15000000	Finance & Treasury	Reg
00008390	Fiscal Analyst	6/2/2025	F	15	10	190823	1	1010001	200036	20030	4000 - ORA	AT17000000	Revenue Analysis	Reg
00008427	Chief Appraiser	6/22/2009	F	15	7	176605	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00008467	Appraiser	5/23/2022	F	13	3	113607	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00008470	Grants Manager	4/4/2016	F	13	3	113607	1	1010001	200070	20015	7000 - OFT	AT15000000	Finance & Treasury	Reg

00008473	Supervisory Customer Service S	8/21/2017	F	13	6	123874	1	1010001	100029	20039	5000 - OTR	AT18202000	Tax & Revenue - CSA	Reg
00008492	Unclaimed Property Specialist	11/17/1997	F	11	9	94148	1	1060086	200060	20016	7000 - OFT	AT15000000	Finance & Treasury	Reg
00008535	Auditor (Tax)	7/24/2017	F	12	5	104168	1	1010001	200054	20035	5000 - OTR	AT18120000	Tax & Revenue - RPTA	Reg
00008624	Director of Operations	12/5/2011	F	17	8	225100	1	1010001	100151	20031	5000 - OTR	AT18010000	Tax & Revenue - DCFO	Reg
00008761	Pension Benefits Specialist	3/16/2009	F	11	10	96547	1	1060038	200007	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00008775	Accounting Technician	11/12/2019	F	08	5	63711	1	1010001	200059	20035	5000 - OTR	AT18120000	Tax & Revenue - RPTA	Reg
00008878	Legal Instruments Examiner	9/14/2020	F	08	5	63711	1	1010001	200053	20036	5000 - OTR	AT18150000	Tax & Revenue - RPTA	Reg
00008931	Appraiser	2/3/2020	F	13	2	110185	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00008954	Administrative Assistant	1/9/2006	F	11	10	96554	1	1010001	100029	20039	5000 - OTR	AT18202000	Tax & Revenue - CSA	Reg
00008973	Director Office of Contracts	4/2/2007	F	16	8	214712	1	1010001	100022	20045	1000 - MGMT	AT12000000	Mgmt & Admin/Fin Ops	Reg
00009002	Lead Customer Service Represen	11/4/2013	F	09	6	72088	IA	1010001	300177	30221	7000 - OFT	AT15000000	Finance & Treasury	Reg
00009030	Revenue Operations Analyst	11/3/2014	F	12	4	101291	1	1010001	200088	20012	7000 - OFT	AT15000000	Finance & Treasury	Reg
00009080	Taxpayer Advocate Specialist	7/9/2007	F	11	5	84517	1	1010001	100029	20032	5000 - OTR	AT18010000	Tax & Revenue - DCFO	Reg
00009088	Chief Assessment Services Div	11/21/2011	F	15	7	176605	1	1010001	200054	20035	5000 - OTR	AT18120000	Tax & Revenue - RPTA	Reg
00009214	Supervisory Appraiser	6/29/2015	F	14	5	142350	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00009216	Accounting Technician	10/19/2015	F	08	10	72721	1	1010001	200054	20035	5000 - OTR	AT18120000	Tax & Revenue - RPTA	Reg
00009273	Director Capital Budgets/Capi	12/4/2023	F	16	8	214712	1	1010001	200030	20004	3000 - OBP	AT11000000	Budget and Planning	Term
00009290	Integrity & Oversight Coordina	5/26/2015	F	11	4	82111	1	1010001	100100	20026	8000 - OIO	AT13000000	Integrity & Oversight	Reg
00009361	Senior Accountant	9/14/2009	F	13	9	134142	1	1010001	200016	20022	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00009363	Supervisory Customer Service T		V	12	0	92664	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00009403	Administrative Coordinator	8/25/2014	F	11	6	86925	1	1010001	200040	20019	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00009439	Supplemental Pay Supervisor	5/2/2022	F	12	10	118558	1	1060020	200004	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00009525	Accounting Technician		V	08	0	56503	1	1060020	200004	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00009582	Supervisory Revenue Officer	3/27/2000	F	13	10	137565	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00009584	Taxpayer Advocate Specialist	3/16/1997	F	12	10	118558	1	1010001	100029	20032	5000 - OTR	AT18010000	Tax & Revenue - DCFO	Reg
00009590	Deputy Director Pay and Retir	5/19/1986	F	16	7	210908	1	1060020	200004	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00009660	Tax Examining Technician	7/24/2017	F	09	4	68116	1	1010001	200055	20034	5000 - OTR	AT18064000	Tax & Revenue - RPA	Reg
00009672	Assessment Program Specialist	9/26/1999	F	11	8	91735	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00009717	Senior Operating Budget Analys		V	13	0	122164	1	1010001	200032	20003	3000 - OBP	AT11000000	Budget and Planning	Reg
00009752	Management Analyst	6/3/2013	F	12	7	109924	1	1010001	100029	20039	5000 - OTR	AT18202000	Tax & Revenue - CSA	Reg
00009809	Returns Processing Assistant	5/23/2022	F	06	8	57763	1	1010001	200055	20034	5000 - OTR	AT18064000	Tax & Revenue - RPA	Reg
00009897	Recorder of Deeds		V	15	0	169497.5	1	1010001	200053	20036	5000 - OTR	AT18150000	Tax & Revenue - RPTA	Reg
00009948	SENIOR ACCOUNTANT		V	13	0	122164	1	1010001	200016	20022	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00010082	Special Pay Analyst	2/21/2017	F	09	9	78046	1	1060020	200004	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00010202	Supervisory Auditor (Tax)	5/14/2006	F	14	6	146393	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00010205	Business Analyst	9/17/2018	F	13	8	130720	1	1010001	100070	20048	6000 - OCIO	AT16000000	Chief Inform Officer - SOAR	Reg
00010249	Accounting Technician	3/16/1998	F	07	10	67548	1	1060086	200060	20016	7000 - OFT	AT15000000	Finance & Treasury	Reg
00010336	Quality Assurance Specialist		V	11	0	74893	1	1010001	200053	20036	5000 - OTR	AT18150000	Tax & Revenue - RPTA	Reg
00010374	Lead Customer Service Tax Spec	9/30/2019	F	11	3	79705	1	1010001	100029	20039	5000 - OTR	AT18200000	Tax & Revenue - CSA	Reg
00010395	Supervisory Revenue Officer	6/16/2025	F	13	1	106763	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - RPTA	Reg
00010485	Tax Examining Technician	3/26/2000	F	09	10	80032	1	1010001	200055	20034	5000 - OTR	AT18064000	Tax & Revenue - RPA	Reg
00010567	Senior Budget Analyst	7/17/2023	F	13	10	137565	1	1010001	150003	20047	100F - FinOps	AT12000000	Mgmt & Admin/Fin Ops	Reg
00010587	Deputy CFO OTR	11/14/2016	F	18	5	245202	1	1010001	100151	20031	5000 - OTR	AT18010000	Tax & Revenue - DCFO	Reg
00010643	Senior Revenue Officer	1/6/1997	F	12	6	107046	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00010673	Senior Auditor (Tax)		V	13	0	106763	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00010711	Customer Service Tax Specialis	3/15/2021	F	09	4	68116	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00010730	Customer Service Operations Sp	10/24/2022	F	11	10	96554	IA	1060151	700403	70602	7000 - OFT	AT15000000	Finance & Treasury	Reg
00010732	Assessment Program Specialist	9/26/1999	F	11	9	94141	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00010818	Senior Capital Budget Analyst	6/20/2023	F	13	4	117029	1	1010001	200030	20004	3000 - OBP	AT11000000	Budget and Planning	Reg
00010828	Accounts Payable Manager	9/23/2024	F	13	7	127297	1	1010001	200016	20022	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00010839	Auditor (Tax)	9/21/2015	F	12	6	107046	1	1010001	200058	20037	5000 - OTR	AT18014000	Tax & Revenue - CO	Reg
00010872	Chief Financial Officer	8/3/2022	F	EX	0	289400	1	1010001	100151	20040	1000 - MGMT	AT10000000	Executive Office	Reg
00010937	Director Pay and Retirement	9/28/2020	F	17	6	220006	1	1060020	200004	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00010941	Human Resources Program Manage	5/23/2016	F	14	5	142350	1	1060020	100060	20042	1000 - MGMT	AT11100000	Office of Human Resources	Reg
00010970	IT Specialist Network Engineer	7/28/2025	F	14	10	162565	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00010977	Document Control Specialist	2/17/2009	F	11	10	96554	1	1010001	100022	20045	1000 - MGMT	AT12000000	Mgmt & Admin/Fin Ops	Reg
00011001	MANAGEMENT ANALYST		V	13	1	106763	1	1010001	200058	20037	5000 - OTR	AT18160000	Tax & Revenue - CO	Reg
00011004	Senior Auditor (Tax)	3/16/2009	F	13	9	134139	1	1010001	200058	20037	5000 - OTR	AT18014000	Tax & Revenue - CO	Reg
00011006	Logistics Management Specialis	7/5/2022	F	13	2	110185	1	1010001	100109	20046	1000 - MGMT	AT12000000	Mgmt & Admin/Fin Ops	Reg

00011023	Payroll Specialist	2/6/2017	F	09	8	76060	1	1060020	200004	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00011055	Information Technology Manager	4/28/2008	F	15	10	190823	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00011057	Director of Revenue Estimation	8/4/2008	F	16	5	199588	1	1010001	200034	20028	4000 - ORA	AT17000000	Revenue Analysis	Reg
00011066	Investigator	3/11/2024	F	13	6	123874	1	1010001	100095	20027	8000 - OIO	AT13000000	Integrity & Oversight	Reg
00011087	Information Technology Manager	6/1/2015	F	15	6	171867	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00011116	Tax Examining Technician	12/1/2014	F	09	6	72088	1	1010001	200055	20034	5000 - OTR	AT18061000	Tax & Revenue - RPA	Reg
00011122	Staff Assistant	1/4/2001	F	09	10	80032	1	1060020	200004	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00011129	Paralegal Specialist	8/24/2015	F	12	9	115680	1	1060105	100092	20044	1000 - MGMT	AT10000000	Executive Office	Reg
00011131	Staff Assistant	10/11/2022	F	09	1	62159	1	1060038	200007	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00011162	Dir Customer SVC Admin	11/24/2008	F	16	3	188267	1	1010001	100029	20039	5000 - OTR	AT18200000	Tax & Revenue - CSA	Reg
00011163	Payroll Financial Officer	2/19/2008	F	14	10	162565	1	1060038	200007	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00011174	Associate Treasurer Debt and	2/9/2015	F	16	8	214712	1	1010001	200078	20008	7000 - OFT	AT15000000	Finance & Treasury	Reg
00012272	Lead Customer Service Tax Spec	3/13/2023	F	11	3	79705	1	1010001	100029	20039	5000 - OTR	AT18200000	Tax & Revenue - CSA	Reg
00011345	Legal Instruments Examiner	2/13/2023	F	08	3	60107	1	1010001	200053	20036	5000 - OTR	AT18150000	Tax & Revenue - RPTA	Reg
00011433	Information Technology Manager	6/20/2023	F	15	10	190823	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00011458	Senior Accountant	11/18/2013	F	13	5	120452	1	1010001	150002	20047	100F - FinOps	AT12000000	Mgmt & Admin/Fin Ops	Term
00011701	Director Financial Operations	3/23/2002	F	16	9	214712	1	1010001	200016	20020	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00011755	Investigator	9/29/2008	F	13	4	117029	1	1010001	100095	20027	8000 - OIO	AT13000000	Integrity & Oversight	Reg
00011841	Assistant General Counsel	4/12/2010	F	15	9	186083	1	1010001	100092	20044	1000 - MGMT	AT10000000	Executive Office	Reg
00011882	TRIAL ATTORNEY	2/18/2020	F	14	4	154855	1	1010001	200054	20035	5000 - OTR	CB10001300	Criminal Section	Term
00011927	Systems Accountant	4/8/2002	F	12	10	118558	1	1010001	200028	20033	5000 - OTR	AT18030000	Tax & Revenue - RAA	Reg
00011987	Senior Capital Budget Analyst	4/23/2012	F	13	6	123874	1	1010001	200030	20004	3000 - OBP	AT11000000	Budget and Planning	Term
00012091	Auditor (Tax)	7/2/2012	F	12	10	118558	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00012177	Legal Instruments Examiner	8/1/2022	F	08	4	61909	1	1010001	200053	20036	5000 - OTR	AT18150000	Tax & Revenue - RPTA	Reg
00012205	Program Manager (Asset Managem	2/14/2022	F	14	9	158522	1	1060116	200094	20017	7000 - OFT	AT15000000	Finance & Treasury	Reg
00012266	Administrative Assistant	7/21/1997	F	11	10	96547	1	1010001	200016	20022	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00012315	Supervisory Customer Service T	2/27/2023	F	13	7	127297	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00012339	Budget Administration Analyst	3/31/2008	F	14	7	150436	1	1010001	200032	20003	3000 - OBP	AT11000000	Budget and Planning	Reg
00012341	Auditor	10/10/2023	F	13	3	113607	1	1010001	100100	20026	8000 - OIO	AT13000000	Integrity & Oversight	Reg
00012346	Test Automation Engineer	2/13/2023	F	14	2	130221	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00012352	Auditor (Tax)	11/13/2018	F	12	5	104168	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00012376	Operating Budget Analyst		V	12	1	92664	1	1010001	200032	20003	3000 - OBP	AT11000000	Budget and Planning	
00012404	Senior Accountant	9/28/1991	F	13	9	134142	1	1010001	150002	20047	100F - FinOps	AT12000000	Mgmt & Admin/Fin Ops	Reg
00012442	Auditor (Tax)		V	12	0	92656	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	
00012492	Lead Customer Service Tax Spec	8/21/2017	F	11	10	96554	1	1010001	100029	20039	5000 - OTR	AT18202000	Tax & Revenue - CSA	Reg
00012571	Tax Examining Technician	7/1/1985	F	09	10	80032	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00012612	Supervisory Auditor (Tax)	3/16/1998	F	14	10	162565	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00012642	Legal Instruments Examiner	10/24/2022	F	08	6	65513	1	1010001	200053	20036	5000 - OTR	AT18150000	Tax & Revenue - RPTA	Reg
00012648	Payroll Technician	4/10/2023	F	08	10	72721	1	1060020	200004	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00012720	Customer Service Representativ	7/3/2023	F	08	10	72721	1	1010001	200076	20013	7000 - OFT	AT15000000	Finance & Treasury	Reg
00012736	Cash Management Analyst	3/26/2001	F	12	10	118558	1	1010001	200070	20015	7000 - OFT	AT15000000	Finance & Treasury	Reg
00012813	General Counsel	8/23/2004	F	17	0	244110.7	1	1010001	100092	20044	1000 - MGMT	AT10000000	Executive Office	Reg
00012830	Appraiser	3/23/2015	F	12	4	101290	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00012878	Supervisory CS Specialist	4/8/2013	F	13	10	137565	1	1010001	100029	20039	5000 - OTR	AT18202000	Tax & Revenue - CSA	Reg
00012889	Unclaimed Property Specialist	12/3/1997	F	11	9	94148	1	1060086	200060	20016	7000 - OFT	AT15000000	Finance & Treasury	Reg
00012976	Director Returns Processing A	8/28/2023	F	16	2	182607	1	1010001	200055	20034	5000 - OTR	AT18060000	Tax & Revenue - RPA	Reg
00012984	Senior Accountant	2/12/2001	F	13	10	137565	1	1010001	200016	20022	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00013003	Auditor	1/7/2019	F	13	10	137565	1	1010001	100100	20026	8000 - OIO	AT13000000	Integrity & Oversight	Reg
00013032	Director Central Accounting O	7/20/2009	F	16	9	214712	1	1010001	200016	20022	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00013051	Information Technology Special	2/16/2010	F	14	10	162565	1	1010001	100070	20048	6000 - OCIO	AT16100000	Chief Inform Officer - PPS	Reg
00013088	Assistant General Counsel	4/13/2020	F	15	5	167129	1	1060105	100092	20044	1000 - MGMT	AT10000000	Executive Office	Reg
00013116	Deputy CFO	7/10/2006	F	18	4	240925	1	1010001	100151	20002	3000 - OBP	AT11000000	Budget and Planning	Reg
00013184	Appraiser	1/27/2014	F	13	7	127295	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00013188	Assistant General Counsel	9/25/2023	F	15	5	167129	1	1010001	100092	20044	1000 - MGMT	AT10000000	Executive Office	Reg
00013227	Fiscal Analyst	2/9/2015	F	15	5	167129	1	1010001	200034	20028	4000 - ORA	AT17000000	Revenue Analysis	Reg
00013282	Executive Director Human Reso	11/10/2008	F	17	10	225100	1	1060020	100060	20042	1000 - MGMT	AT11100000	Office of Human Resources	Reg
00013340	Deputy CFO Policy	7/2/2001	F	18	4	240925	1	1010001	100151	20029	4000 - ORA	AT17000000	Revenue Analysis	Reg
00013382	Operating Budget Manager	3/4/2019	F	15	5	167129	1	1010001	200032	20003	3000 - OBP	AT11000000	Budget and Planning	Term
00013397	Cash Operations Manager	10/23/2023	F	13	10	137565	1	1010001	200087	20011	7000 - OFT	AT15000000	Finance & Treasury	Reg

00013422	Public Affairs Officer	6/2/2025	F	15	1	148172	1	1010001	100003	20041	1000 - MGMT	AT10000000	Executive Office	Reg
00013542	Information Technology Manager	1/5/2009	F	15	10	190823	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00013590	Revenue Accounting Manager	5/29/2018	F	15	6	171867	1	1010001	200028	20033	5000 - OTR	AT18030000	Tax & Revenue - RAA	Reg
00013688	Director Economic Affairs	7/16/2001	F	16	10	214712	1	1010001	200036	20030	4000 - ORA	AT17000000	Revenue Analysis	Reg
00013775	Director Financial Control & R	10/20/2014	F	16	7	210908	1	1010001	200016	20023	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00013863	Debt Manager	12/11/2006	F	14	10	162565	1	1010001	200078	20008	7000 - OFT	AT15000000	Finance & Treasury	Reg
00013967	Appraiser	7/20/2009	F	13	10	137561	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00013978	Financial Systems Analyst III	5/10/1999	F	14	10	162565	1	1010001	200029	20005	3000 - OBP	AT11000000	Budget and Planning	Reg
00014009	Director Tax Systems Group	10/15/2007	F	16	9	214712	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00014023	Director Fiscal & Legislative	2/6/2017	F	16	10	214712	1	1010001	200034	20028	4000 - ORA	AT17000000	Revenue Analysis	Reg
00014025	IT Specialist (OS)	9/28/2009	F	12	10	118558	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00014039	Assessment Program Specialist	8/21/2006	F	11	10	96547	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00014051	Appraiser	9/24/2001	F	13	10	137561	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00014120	Executive Assistant	10/15/1996	F	13	10	137565	1	1010001	100151	20002	3000 - OBP	AT11000000	Budget and Planning	Reg
00014163	Customer Service Specialist		V	09	1	62158	1	1010001	100029	20039	5000 - OTR	AT18202000	Tax & Revenue - CSA	
00014164	Customer Service Operations Ma		V	12	0	92664	1	1010001	200076	20013	7000 - OFT	AT15000000	Finance & Treasury	
00014182	Revenue Accounting Specialist	2/21/2017	F	11	3	79705	1	1010001	200028	20033	5000 - OTR	AT18030000	Tax & Revenue - RAA	Reg
00014322	Financial Specialist	1/27/1997	F	12	5	104168	1	1010001	200076	20013	7000 - OFT	AT15000000	Finance & Treasury	Reg
00014341	Supervisory Revenue Officer	7/17/2000	F	14	8	154479	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00014521	Paralegal Specialist	1/18/2022	F	12	4	101291	1	1010001	100092	20044	1000 - MGMT	AT10000000	Executive Office	Reg
00014545	Tax Examining Technician	1/20/1998	F	09	10	80032	1	1010001	200055	20034	5000 - OTR	AT18061000	Tax & Revenue - RPA	Reg
00014782	Staff Assistant	8/3/1998	F	12	10	118558	1	1010001	200040	20020	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00014786	Auditor (Tax)	1/27/2003	F	12	10	118558	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00014787	Taxpayer Advocate Specialist	7/17/2023	F	11	10	96547	1	1010001	100029	20032	5000 - OTR	AT18010000	Tax & Revenue - DCFO	Reg
00014834	Legal Instruments Examiner	10/1/1994	F	08	10	72721	1	1010001	200053	20036	5000 - OTR	AT18150000	Tax & Revenue - RPTA	Reg
00014870	Special Pay Analyst	6/2/2025	F	11	10	96547	1	1060030	200009	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00014920	Returns Processing Assistant		V	06	0	46437	1	1010001	200055	20034	5000 - OTR	AT18064000	Tax & Revenue - RPA	
00015258	Program Analyst	2/5/2007	F	14	9	158522	1	1010001	100029	20032	5000 - OTR	AT18010000	Tax & Revenue - DCFO	Reg
00015309	Payroll Technician	5/23/2022	F	08	8	69117	1	1060020	200004	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00015315	Unit Manager	7/19/2010	F	13	4	117029	1	1010001	200054	20035	5000 - OTR	AT18120000	Tax & Revenue - RPTA	Reg
00015325	Deputy Director CSA	9/22/2025	F	15	10	190823	1	1010001	100029	20039	5000 - OTR	AT18200000	Tax & Revenue - CSA	Reg
00015387	Senior Revenue Officer		V	12	0	92656	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	
00015475	Administrative Assistant	5/1/2006	F	11	10	96554	1	1010001	200034	20028	4000 - ORA	AT17000000	Revenue Analysis	Reg
00015513	Revenue Officer	5/14/2007	F	11	5	84517	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00015522	Financial Analyst		V	12	0	92664	1	1010001	200073	20015	7000 - OFT	AT15000000	Finance & Treasury	
00015530	Staff Assistant	4/17/2018	F	09	6	72088	1	1060020	200004	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00015546	Contract Specialist	8/18/2008	F	13	9	134142	1	1010001	100022	20045	1000 - MGMT	AT12000000	Mgmt & Admin/Fin Ops	Reg
00015550	Payment Operations Manager	5/24/1994	F	13	10	137565	1	1010001	200088	20012	7000 - OFT	AT15000000	Finance & Treasury	Reg
00015564	Appraiser	11/28/2005	F	13	9	134139	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00015566	Auditor (Tax)	6/18/2012	F	12	8	112802	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00015598	Supervisory Contract Specialis	2/4/2008	F	15	7	176605	1	1010001	100022	20045	1000 - MGMT	AT12000000	Mgmt & Admin/Fin Ops	Reg
00015614	Accounting Technician	3/31/1997	F	09	10	80032	1	1060030	200009	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00015644	Recordation Tax Exemption Spec	3/12/2012	F	12	1	92656	1	1010001	200053	20036	5000 - OTR	AT18150000	Tax & Revenue - RPTA	Reg
00015717	Real Property Program Speciali	2/17/1998	F	12	9	115680	1	1010001	200059	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00015733	Staff Assistant	6/8/2020	F	09	7	74074	1	1010001	200054	20035	5000 - OTR	AT18120000	Tax & Revenue - RPTA	Reg
00015838	Recordation Tax Specialist	6/30/2014	F	11	5	84517	1	1010001	200053	20036	5000 - OTR	AT18150000	Tax & Revenue - RPTA	Reg
00015902	Revenue Officer	9/25/2023	F	11	10	96547	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00015910	Business Analyst	7/18/2022	F	13	10	137565	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00015926	Cluster Accounting Analyst	1/25/2016	F	14	6	146393	1	1010001	200016	20023	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00015953	Unit Manager (Operations)	1/27/2014	F	13	7	127297	1	1010001	200054	20035	5000 - OTR	AT18120000	Tax & Revenue - RPTA	Reg
00015975	Cost Analyst	1/2/2024	F	11	10	96554	1	1010001	200030	20004	3000 - OBP	AT11000000	Budget and Planning	Reg
00016000	Information Technology Special	2/16/2010	F	14	10	162565	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00016012	Tax Fraud Manager	8/14/2023	F	14	7	150436	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00016181	Tax Examining Technician	4/20/2015	F	09	7	74074	1	1010001	200055	20034	5000 - OTR	AT18064000	Tax & Revenue - RPA	Reg
00016244	Information Technology Speciai	11/9/2009	F	14	9	158522	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00016393	Director Accounting Systems A		V	16	0	176948	1	1010001	200016	20022	2000 - OFOS	AT14000000	Fin Operations & Sys	
00016400	Accounting Technician	4/4/2016	F	08	6	65513	1	1010001	200054	20035	5000 - OTR	AT18120000	Tax & Revenue - RPTA	Reg
00016441	Supervisory Appraiser	5/29/2005	F	14	8	154479	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00016449	Financial Systems Analyst	1/13/2025	F	13	10	137565	1	1010001	200029	20005	3000 - OBP	AT11000000	Budget and Planning	Reg

00016461	Administrative Coordinator	8/14/2023	F	11	6	86925	1	1010001	100151	20040	1000 - MGMT	AT10000000	Executive Office	Reg
00016502	Information Technology Special	4/20/2015	F	14	10	162565	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00016523	Senior Revenue Officer	11/5/2012	F	12	4	101290	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00016550	Lead Customer Service Represen	5/13/2019	F	09	10	80032	1	1010001	200076	20013	7000 - OFT	AT15000000	Finance & Treasury	Reg
00016568	Returns Processing Clerk		V	07	1	51456	1	1010001	200055	20034	5000 - OTR	AT18064000	Tax & Revenue - RPA	
00016603	Tax Examining Technician	9/22/2014	F	09	10	80032	1	1010001	200055	20034	5000 - OTR	AT18061000	Tax & Revenue - RPA	Reg
00016613	Accounting Technician	9/17/2018	F	08	10	72721	1	1010001	200059	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00016634	Tax Examining Technician	3/26/2000	F	09	10	80032	1	1010001	200055	20034	5000 - OTR	AT18060000	Tax & Revenue - RPA	Reg
00016672	Customer Service Representativ	11/7/2022	F	08	5	63711	1	1010001	200076	20013	7000 - OFT	AT15000000	Finance & Treasury	Reg
00016688	Operating Budget Advisor	1/4/2010	F	14	10	162565	1	1010001	200032	20003	3000 - OBP	AT11000000	Budget and Planning	Reg
00016692	Staff Assistant	4/2/2018	F	09	6	72088	1	1010001	200054	20035	5000 - OTR	AT18120000	Tax & Revenue - RPTA	Reg
00016698	Pension Benefits Specialist	9/8/2025	F	11	6	86923	1	1060020	200004	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00016741	Tax Fraud Specialist		V	12	0	92656	1	1010001	200058	20037	5000 - OTR	AT18014000	Tax & Revenue - CO	
00016752	Support Services Assistant	10/20/2025	F	07	1	51456	1	1010001	100109	20046	1000 - MGMT	AT12000000	Mgmt & Admin/Fin Ops	Reg
00016838	Financial Manager	8/5/2002	F	14	10	162565	1	1010001	100151	20006	7000 - OFT	AT15000000	Finance & Treasury	Reg
00016882	Customer Service Representativ	3/16/1998	F	08	10	72721	IA	1010001	100071	60158	7000 - OFT	AT15000000	Finance & Treasury	Reg
00017002	Customer Service Specialist	2/21/1991	F	09	10	80032	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00017003	RETURNS PROCESSING CLERK		V	07	1	51456	1	1010001	200055	20034	5000 - OTR	AT18064000	Tax & Revenue - RPA	
00017014	Information Technology Special		V	12	0	92656	1	1010001	100070	20048	6000 - OCIO	AT16100000	Chief Inform Officer - PPS	
00017020	Customer Service Specialist	3/25/1991	F	09	10	80032	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00017035	Supervisory Legal Instruments	3/20/2017	F	11	4	82111	1	1010001	200053	20036	5000 - OTR	AT18150000	Tax & Revenue - RPTA	Reg
00017055	IT Project Liaison	1/19/2021	F	14	5	142350	1	1010001	100151	20006	7000 - OFT	AT15000000	Finance & Treasury	Reg
00017111	Information Technology Special	6/19/2000	F	14	10	162565	1	1010001	100070	20048	6000 - OCIO	AT16000000	Chief Inform Officer - SOAR	Reg
00017112	Information Technology Manager	10/5/2015	F	15	10	190823	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00017116	Senior Auditor (Tax)	2/7/1980	F	13	10	137561	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00017144	Supervisory Information Techno	6/12/2006	F	14	8	154479	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00017177	Revenue Officer		V	11	0	74893	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	
00017276	Financial Systems & Accounting	7/29/2013	F	15	6	171867	1	1010001	200016	20022	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00017425	Information Technology Special		V	14	0	126178	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	
00017467	Senior Accountant	6/2/2014	F	13	7	127297	1	1010001	200016	20022	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00017510	Tax Examining Technician	8/4/1987	F	09	10	80032	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00017635	Legal Instruments Examiner	9/28/2020	F	08	5	63711	1	1010001	200053	20036	5000 - OTR	AT18150000	Tax & Revenue - RPTA	Reg
00017723	Lead Assessment Program Specia	6/6/1988	F	12	8	112802	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00017739	Supervisory Appraiser	8/17/2009	F	14	10	162565	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00017741	Lead Support Services Spec		V	11	0	74893	1	1010001	100109	20046	1000 - MGMT	AT12000000	Mgmt & Admin/Fin Ops	
00017747	Lead Customer Service Represen	9/10/2012	F	09	9	78046	IA	1010001	700320	70440	7000 - OFT	AT15000000	Finance & Treasury	Reg
00017786	Appraiser	10/26/1987	F	13	10	137561	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00017883	Senior Mgr Operations & Admin	3/3/1985	F	14	10	162565	1	1010001	200040	20020	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00018006	Customer Service Specialist	11/2/2015	F	09	4	68116	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00018012	Customer Service Specialist	12/30/2013	F	09	8	76060	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00018031	Lead Legal Instruments Examine		V	09	1	62158	1	1010001	200053	20036	5000 - OTR	AT18150000	Tax & Revenue - RPTA	
00018060	Lead Customer Service Tax Spec		V	11	0	74893	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	
00018104	Executive Assistant	2/19/1991	F	13	10	137565	1	1010001	200032	20003	3000 - OBP	AT11000000	Budget and Planning	Reg
00018119	Returns Processing Manager (Br	3/26/2000	F	13	6	123874	1	1010001	200055	20034	5000 - OTR	AT18064000	Tax & Revenue - RPA	Reg
00018120	Supervisory Returns Processing		V	10	1	68189	1	1010001	200055	20034	5000 - OTR	AT18063000	Tax & Revenue - RPA	
00018190	Customer Service Representativ		V	08	0	56507	1	1010001	200076	20013	7000 - OFT	AT15000000	Finance & Treasury	
00018214	Support Services Assistant	7/5/1998	F	08	10	72721	1	1010001	100109	20046	1000 - MGMT	AT12000000	Mgmt & Admin/Fin Ops	Reg
00018239	Systems Accountant	8/27/2012	F	12	9	115680	1	1010001	200059	20035	5000 - OTR	AT18120000	Tax & Revenue - RPTA	Reg
00018275	Appraiser	1/9/1985	F	12	10	118558	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00018301	Information Technology Manager	1/6/2020	F	15	10	190823	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00018370	Tax Examining Technician		V	09	0	62158	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	
00018525	Supervisory Auditor (Tax)	3/18/2007	F	14	10	162565	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00018625	Auditor (Tax)		V	12	0	92656	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	
00018673	Taxpayer Advocate Specialist		V	11	0	74893	1	1010001	100029	20039	5000 - OTR	AT18200000	Tax & Revenue - CSA	
00018731	Returns Processing Clerk	1/28/2002	F	07	10	67548	1	1010001	200055	20034	5000 - OTR	AT18064000	Tax & Revenue - RPA	Reg
00018788	Cluster Accounting Analyst	12/15/2014	F	14	5	142350	1	1010001	200016	20022	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00018807	Lead Customer Service Represen	10/15/2018	F	09	4	68116	1	1010001	200076	20013	7000 - OFT	AT15000000	Finance & Treasury	Reg
00018855	Unclaimed Property Technician	3/27/2023	F	08	10	72721	1	1060086	200060	20016	7000 - OFT	AT15000000	Finance & Treasury	Reg
00018874	Auditor (Tax)	7/21/1997	F	12	10	118558	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg

00018928	Information Technology Special		V	14	0	126178	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	
00018995	Real Property Program Speciali	8/4/1997	F	12	10	118558	1	1010001	200059	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00019044	Supervisory Returns Processing	3/3/1997	F	10	10	87877	1	1010001	200055	20034	5000 - OTR	AT18063000	Tax & Revenue - RPA	Reg
00019191	Tax Examining Technician	12/3/2001	F	09	10	80032	1	1010001	200055	20034	5000 - OTR	AT18061000	Tax & Revenue - RPA	Reg
00019370	Staff Assistant	3/22/1993	F	11	9	94148	1	1010001	200028	20033	5000 - OTR	AT18030000	Tax & Revenue - RAA	Reg
00019579	Recordation Tax Specialist	10/15/2019	F	11	1	74893	1	1010001	200053	20036	5000 - OTR	AT18150000	Tax & Revenue - RPTA	Reg
00019590	Real Property Program Speciali	1/29/2001	F	12	10	118558	1	1010001	200054	20035	5000 - OTR	AT18120000	Tax & Revenue - RPTA	Reg
00019628	Supervisory Systems and Proces	6/17/2013	F	14	7	150436	1	1010001	200055	20034	5000 - OTR	AT18063000	Tax & Revenue - RPA	Reg
00019799	Tax Fraud Specialist	1/23/2006	F	12	3	98412	1	1010001	200058	20037	5000 - OTR	AT18014000	Tax & Revenue - CO	Reg
00019855	Taxpayer Advocate	1/30/2023	F	14	3	134264	1	1010001	100029	20032	5000 - OTR	AT18010000	Tax & Revenue - DCFO	Reg
00019960	Information Technology Special	6/12/2006	F	12	10	118558	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00019979	Payroll Specialist	2/19/2019	F	11	1	74893	1	1060020	200004	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00019985	Unclaimed Property Analyst	12/1/2003	F	12	8	112802	1	1060086	200060	20016	7000 - OFT	AT15000000	Finance & Treasury	Reg
00020148	Pension Benefits Specialist	3/28/2022	F	11	6	86923	1	1060020	200004	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00020156	Accounting Technician	7/23/2018	F	08	10	72721	1	1010001	150002	20047	100F - FinOps	AT12000000	Mgmt & Admin/Fin Ops	Reg
00020173	Criminal Investigator		V	13	1	109518	1	1010001	200058	20037	5000 - OTR	AT18014000	Tax & Revenue - CO	
00020222	Tax Fraud Specialist	12/15/2014	F	12	2	95534	1	1010001	200058	20037	5000 - OTR	AT18014000	Tax & Revenue - CO	Reg
00020227	Assistant Director of Operatio		V	15	0	169497.5	1	1010001	100151	20031	5000 - OTR	AT18010000	Tax & Revenue - DCFO	
00020286	Program Analyst	1/5/1998	F	13	10	137565	1	1010001	200055	20034	5000 - OTR	AT18063000	Tax & Revenue - RPA	Reg
00020327	Information Technology Special	1/21/2009	F	14	10	162565	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00020411	Supervisory Appraiser	11/27/2006	F	14	4	138307	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00020431	Supervisory Information Techno		V	14	1	126178	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	
00020494	Tax Examining Technician	10/19/2015	F	09	10	80032	1	1010001	200055	20034	5000 - OTR	AT18064000	Tax & Revenue - RPA	Reg
00020507	Accountant	3/1/2021	F	11	3	79705	1	1010001	200016	20022	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00020538	Information Technology Manager	8/25/2014	F	15	7	176605	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00020543	Supervisor Revenue Officer	12/12/2005	F	13	10	137565	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00020614	Revenue Officer	1/20/1998	F	11	10	96547	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00020628	Accounting & Compliance Manage	8/5/2019	F	14	10	162565	1	1010001	200070	20008	7000 - OFT	AT15000000	Finance & Treasury	Reg
00020644	Lead Customer Service Tax Spec		V	11	0	74893	1	1010001	100029	20039	5000 - OTR	AT18202000	Tax & Revenue - CSA	
00020680	Criminal Investigator	4/6/2015	F	13	10	137565	1	1010001	100095	20027	8000 - OIO	AT13000000	Integrity & Oversight	Reg
00020685	Real Property Assessment Manag	10/1/2007	F	14	7	150436	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00020687	Information Technology Special	8/25/2014	F	14	10	162565	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00020698	Chief Information Officer	6/26/2017	F	17	7	225100	1	1010001	100072	20048	6000 - OCIO	AT16100000	Chief Inform Officer - PPS	Reg
00020700	Financial Systems Specialist	10/12/1999	F	12	8	112802	1	1010001	200016	20022	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00020740	Director Office of Logistics	9/26/2011	F	14	7	150436	1	1010001	100109	20046	1000 - MGMT	AT12000000	Mgmt & Admin/Fin Ops	Reg
00020749	Real Property Program Speciali	12/5/1999	F	12	10	118558	1	1010001	200054	20035	5000 - OTR	AT18120000	Tax & Revenue - RPTA	Reg
00020781	Pension Benefits Specialist	12/1/2014	F	11	8	91735	1	1060020	200004	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00020792	Office Manager	6/20/1999	F	13	9	134142	1	1010001	100151	20029	4000 - ORA	AT17000000	Revenue Analysis	Reg
00020900	Information Technology Special	10/13/2009	F	12	10	118558	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00020944	Senior Revenue Officer	5/29/2018	F	12	3	98412	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00020958	Payroll Technician	8/31/2020	F	08	9	70919	1	1060020	200004	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00021014	Returns Processing Assistant	5/22/2023	F	06	3	49673	1	1010001	200055	20034	5000 - OTR	AT18064000	Tax & Revenue - RPA	Reg
00021080	Customer Service Tax Specialis	9/12/2022	F	09	1	62158	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00021082	Management and Program Analyst	8/1/2022	F	12	5	104168	1	1010001	200055	20034	5000 - OTR	AT18060000	Tax & Revenue - RPA	Reg
00021155	Manager Financial Planning an	9/17/2007	F	15	7	176605	1	1010001	200029	20005	3000 - OBP	AT11000000	Budget and Planning	Reg
00021170	Tax Examining Technician	6/6/1988	F	09	10	80032	1	1010001	200055	20034	5000 - OTR	AT18061000	Tax & Revenue - RPA	Reg
00021198	Revenue Officer (Advisor)	3/23/2015	F	13	3	113607	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00021201	Management Analyst	6/8/2009	F	12	10	118558	1	1010001	200076	20013	7000 - OFT	AT15000000	Finance & Treasury	Reg
00021250	Real Property Program Speciali	2/24/2014	F	11	4	82111	1	1010001	200054	20035	5000 - OTR	AT18120000	Tax & Revenue - RPTA	Reg
00021376	Revenue Officer	12/4/2023	F	11	10	96547	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00021412	IT Specialist (SYSADMIN) & (NE		V	14	1	126178	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	
00021454	Assessment Program Specialist	3/18/2019	F	11	5	84517	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00021462	Supervisory Returns Processing	8/23/1981	F	12	10	118558	1	1010001	200055	20034	5000 - OTR	AT18061000	Tax & Revenue - RPA	Reg
00021478	Revenue Officer	7/15/2001	F	13	7	127295	1	1010001	200059	20038	5000 - OTR	AT18014000	Tax & Revenue - CO	Reg
00021514	Appraiser	7/8/2019	F	12	5	104168	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00021521	Senior Policy Analyst	2/27/2023	F	15	9	186083	1	1010001	200070	20015	7000 - OFT	AT15000000	Finance & Treasury	Reg
00021530	Returns Processing Clerk	9/13/1993	F	07	10	67548	1	1010001	200055	20034	5000 - OTR	AT18064000	Tax & Revenue - RPA	Reg
00021535	Customer Service Representativ		V	08	0	56507	1	1010001	200076	20013	7000 - OFT	AT15000000	Finance & Treasury	
00021578	Executive Assistant	8/14/2000	F	12	10	118558	1	1010001	100093	20031	5000 - OTR	AT18020000	Tax & Revenue - GC	Reg

00021596	HR Business Partner	6/5/2023	F	13	10	137565	1	1060020	100060	20042	1000 - MGMT	AT11100000	Office of Human Resources	Reg
00021597	Staff Assistant		V	09	0	62159	1	1010001	100151	20006	7000 - OFT	AT15000000	Finance & Treasury	
00021600	Accountant	12/29/2025	F	12	10	118558	1	1010001	200016	20022	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00021614	Supervisory Returns Processing	11/3/2025	F	12	4	101291	1	1010001	200055	20034	5000 - OTR	AT18064000	Tax & Revenue - RPA	Reg
00021627	Customer Service Tax Specialis	4/26/2021	F	09	5	70102	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00021673	Accountant	9/22/2014	F	12	4	101291	1	1010001	200016	20022	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00021704	Lead Customer Service Represen	10/12/1999	F	09	10	80032	1A	1060283	300049	30062	7000 - OFT	AT15000000	Finance & Treasury	Reg
00021728	Payroll Technician	5/8/2023	F	08	10	72721	1	1060020	200004	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00021743	Revenue Officer	2/17/2009	F	11	10	96547	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00021745	Senior Budget Analyst	7/23/2018	F	13	8	130720	1	1010001	200028	20033	5000 - OTR	AT18030000	Tax & Revenue - RAA	Reg
00021838	Operating Budget Analyst		V	12	0	92664	1	1010001	200032	20003	3000 - OBP	AT11000000	Budget and Planning	
00021846	Accountant	5/9/2022	F	12	3	98412	1	1010001	200028	20033	5000 - OTR	AT18030000	Tax & Revenue - RAA	Reg
00021919	Senior Revenue Accounting Spec	4/3/2005	F	13	9	134139	1	1010001	200028	20033	5000 - OTR	AT18030000	Tax & Revenue - RAA	Reg
00021959	Accounting Technician	5/21/1990	F	09	10	80032	1	1010001	200059	20035	5000 - OTR	AT18120000	Tax & Revenue - RPTA	Reg
00022039	Customer Service Representativ	4/10/2000	F	08	10	72721	1A	1010001	200076	20013	7000 - OFT	AT15000000	Finance & Treasury	Reg
00022175	Banking Analyst	1/17/2023	F	12	8	112802	1	1010001	200025	20015	7000 - OFT	AT15000000	Finance & Treasury	Reg
00022182	Accounting Technician	7/11/2016	F	08	7	67315	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00022184	Quality Control Specialist (Su	3/25/2024	F	11	2	77299	1	1010001	200016	20022	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00022206	Financial Systems Specialist	8/8/2016	F	12	8	112802	1	1010001	200016	20022	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00022286	Tax Examining Technician	9/17/2007	F	09	9	78046	1	1010001	200055	20034	5000 - OTR	AT18064000	Tax & Revenue - RPA	Reg
00022312	Real Property Program Speciali	3/21/2016	F	12	4	101290	1	1010001	200054	20035	5000 - OTR	AT18120000	Tax & Revenue - RPTA	Reg
00022317	Senior Revenue Officer	3/12/2012	F	12	6	107046	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00022326	Revenue Officer	3/3/2008	F	11	9	94141	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00022354	Information Technology Special	7/6/1998	F	12	10	118558	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00022454	Support Services Assistant	10/17/2016	F	08	10	72721	1	1010001	100109	20046	1000 - MGMT	AT12000000	Mgmt & Admin/Fin Ops	Reg
00022474	Supervisory Returns Processing	10/1/1994	F	13	10	137565	1	1010001	200055	20034	5000 - OTR	AT18061000	Tax & Revenue - RPA	Reg
00022520	Management Analyst	3/16/1998	F	12	10	118558	1	1010001	100029	20039	5000 - OTR	AT18202000	Tax & Revenue - CSA	Reg
00022521	Supervisory Legal Instruments	5/29/2007	F	11	5	84518	1	1010001	200053	20036	5000 - OTR	AT18150000	Tax & Revenue - RPTA	Reg
00022571	Payroll Operations Supervisor	12/5/2022	F	12	6	107046	1	1060020	200004	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00022633	IT Specialist (APPSW)	9/8/2025	F	14	10	162565	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00022712	Deputy Chief Assessment Servi	10/15/2018	F	14	8	154479	1	1010001	200054	20035	5000 - OTR	AT18120000	Tax & Revenue - RPTA	Reg
00022726	Budget Analyst	11/6/2023	F	11	9	94148	1	1010001	150003	20047	100F - FinOps	AT12000000	Mgmt & Admin/Fin Ops	Reg
00022918	Accountant	10/21/2013	F	12	6	107046	1	1010001	200076	20013	7000 - OFT	AT15000000	Finance & Treasury	Reg
00022932	Tax Examining Technician	8/20/2007	F	09	9	78046	1	1010001	200055	20034	5000 - OTR	AT18061000	Tax & Revenue - RPA	Reg
00022949	Customer Service Tax Specialis	12/15/2025	F	07	10	67548	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00022955	Returns Processing Assistant	8/7/2005	F	07	10	67548	1	1010001	200055	20034	5000 - OTR	AT18064000	Tax & Revenue - RPA	Reg
00022987	Budget Technician		V	08	0	56507	1	1010001	200032	20003	3000 - OBP	AT11000000	Budget and Planning	
00023003	Tax Examining Technician	11/7/1988	F	09	10	80032	1	1010001	200055	20034	5000 - OTR	AT18063000	Tax & Revenue - RPA	Reg
00023022	Real Property Program Speciali	4/7/2014	F	09	6	72088	1	1010001	200054	20035	5000 - OTR	AT18120000	Tax & Revenue - RPTA	Reg
00023029	Internal Controls Manager	7/6/2020	F	15	5	167129	1	1010001	100151	20040	1000 - MGMT	AT10000000	Executive Office	Reg
00023034	Revenue Officer	7/24/2006	F	11	5	84517	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00023068	Accountant	12/9/2019	F	12	4	101291	1	1010001	150002	20047	100F - FinOps	AT12000000	Mgmt & Admin/Fin Ops	Reg
00023094	Tax Examining Technician	5/7/2012	F	09	9	78046	1	1010001	200055	20034	5000 - OTR	AT18061000	Tax & Revenue - RPA	Reg
00023104	Tax Examining Technician		V	11	1	74893	1	1010001	200055	20034	5000 - OTR	AT18061000	Tax & Revenue - RPA	Reg
00023114	Accounting Technician	8/20/2018	F	08	7	67315	1	1010001	150002	20047	100F - FinOps	AT12000000	Mgmt & Admin/Fin Ops	Reg
00023158	Cluster Accounting Analyst	6/16/2014	F	14	10	162565	1	1010001	200016	20023	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00023256	Returns Processing Assistant	11/6/2023	F	06	1	46437	1	1010001	200055	20034	5000 - OTR	AT18064000	Tax & Revenue - RPA	Reg
00023272	Customer Service Tax Specialis	11/21/2022	F	09	6	72088	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00023319	Government Information Special	5/2/2005	F	13	10	137565	1	1010001	100093	20031	5000 - OTR	AT18020000	Tax & Revenue - GC	Reg
00023369	Accounting Technician	3/13/2000	F	09	10	80032	1	1010001	200028	20033	5000 - OTR	AT18030000	Tax & Revenue - RAA	Reg
00023377	Accounting Technician	7/7/2008	F	08	10	72721	1	1010001	150002	20047	100F - FinOps	AT12000000	Mgmt & Admin/Fin Ops	Reg
00023432	IT Manager Security Officer	9/28/2009	F	15	10	190823	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00023445	Tax Examining Technician	11/13/2006	F	09	9	78046	1	1010001	200059	20038	5000 - OTR	AT18014000	Tax & Revenue - CO	Reg
00023461	Program Analyst		V	12	1	92664	1	1010001	200087	20011	7000 - OFT	AT15000000	Finance & Treasury	
00023475	Support Services Assistant		V	08	1	56503	1	1010001	100109	20046	1000 - MGMT	AT12000000	Mgmt & Admin/Fin Ops	
00023604	Executive Assistant	1/13/1992	F	14	10	162565	1	1010001	100151	20040	1000 - MGMT	AT10000000	Executive Office	Reg
00023626	Program Analyst	1/6/1986	F	13	10	137565	1	1010001	200055	20034	5000 - OTR	AT18063000	Tax & Revenue - RPA	Reg
00023683	Program Analyst	3/2/2009	F	13	9	134142	1	1010001	200055	20034	5000 - OTR	AT18063000	Tax & Revenue - RPA	Reg
00023707	Tax Examining Technician	6/30/1986	F	09	10	80032	1	1010001	200055	20034	5000 - OTR	AT18064000	Tax & Revenue - RPA	Reg

00023716	Tax Examining Technician	10/20/2014	F	09	9	78046	1	1010001	200055	20034	5000 - OTR	AT18061000	Tax & Revenue - RPA	Reg
00023902	Tax Fraud Specialist	7/23/2018	F	12	4	101290	1	1010001	200058	20037	5000 - OTR	AT18014000	Tax & Revenue - CO	Reg
00024008	Assistant General Counsel	8/8/2016	F	15	10	190823	1	1010001	100093	20031	5000 - OTR	AT18020000	Tax & Revenue - GC	Reg
00024168	Special Pay Manager	11/20/1989	F	13	5	120452	1	1060020	200004	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00024229	Supervisor Revenue Officer	1/23/2006	F	13	7	127297	1	1010001	200058	20037	5000 - OTR	AT18014000	Tax & Revenue - CO	Reg
00024251	Program Analyst	10/16/2006	F	13	9	134142	1	1010001	200055	20034	5000 - OTR	AT18063000	Tax & Revenue - RPA	Reg
00024346	Customer Service Representativ		V	08	0	56507	1	1010001	200076	20013	7000 - OFT	AT15000000	Finance & Treasury	
00024391	Criminal Investigator	1/8/2018	F	13	10	142386	1	1010001	200058	20037	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00024442	Unit Manager	5/24/2021	F	13	5	120452	1	1010001	200059	20035	5000 - OTR	AT18120000	Tax & Revenue - RPTA	Reg
00024484	Criminal Investigator	2/21/2017	F	13	10	142386	1	1010001	200058	20037	5000 - OTR	AT18014000	Tax & Revenue - CO	Reg
00024528	Real Property Program Speciali	8/22/2016	F	12	5	104168	IA	1010001	200054	20035	5000 - OTR	AT18120000	Tax & Revenue - RPTA	Reg
00024546	Operations Analyst	10/9/2012	F	13	7	127297	1	1010001	100029	20032	5000 - OTR	AT18010000	Tax & Revenue - DCFO	Reg
00024554	Financial Policy Writer	1/29/2024	F	13	5	120452	1	1010001	200024	20024	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00024586	Auditor (Tax)	3/23/1992	F	12	10	118558	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00024634	Associate Deputy CFO OBP	4/19/1999	F	17	5	220006	1	1010001	100151	20002	3000 - OBP	AT11000000	Budget and Planning	Reg
00024678	Director Financial Management	5/10/2010	F	16	8	214712	1	1010001	100070	20048	6000 - OCIO	AT16100000	Chief Inform Officer - PPS	Reg
00024707	Returns Processing Assistant	1/29/2001	F	07	10	67548	1	1010001	200055	20034	5000 - OTR	AT18064000	Tax & Revenue - RPA	Reg
00024732	Auditor	7/17/2023	F	13	7	127297	1	1010001	100100	20026	8000 - OIO	AT13000000	Integrity & Oversight	Reg
00024778	Appraiser	12/5/2011	F	12	6	107046	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00024786	Information Technology Special	5/13/2019	F	14	10	162565	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00024801	Staff Assistant		V	11	1	74893	1	1010001	200055	20034	5000 - OTR	AT18060000	Tax & Revenue - RPA	
00024855	Staff Assistant	8/29/2022	F	09	3	66131	1	1010001	100151	20031	5000 - OTR	AT18010000	Tax & Revenue - DCFO	Reg
00025053	Executive Assistant	7/27/2009	F	13	9	134142	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00025066	Supervisory Returns Processing	6/13/1988	F	13	9	134142	1	1010001	200055	20034	5000 - OTR	AT18061000	Tax & Revenue - RPA	Reg
00025195	Management Analyst	1/13/1992	F	12	10	118558	1	1010001	200028	20033	5000 - OTR	AT18030000	Tax & Revenue - RAA	Reg
00025315	Appraiser	3/17/1981	F	12	10	118558	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00025392	Auditor (Tax)	3/16/1998	F	12	10	118558	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00025434	Payroll Technician	3/24/2025	F	08	10	72721	1	1060020	200004	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00025492	Tax Examining Technician	9/6/2016	F	09	5	70102	1	1010001	200055	20034	5000 - OTR	AT18063000	Tax & Revenue - RPA	Reg
00025527	Auditor (Tax)		V	13	0	106763	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	
00025591	Director of Audit and Criminal	8/3/2020	F	16	8	214712	1	1010001	200058	20037	5000 - OTR	AT18160000	Tax & Revenue - CO	Reg
00025645	Payroll Specialist	8/11/2014	F	11	6	86923	1	1060020	200004	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00025721	Supervisory Customer Service T	8/21/2007	F	13	1	106763	1	1010001	100029	20039	5000 - OTR	AT18202000	Tax & Revenue - CSA	Reg
00025764	Management & Program Analyst -	6/1/2015	F	12	10	118558	1	1010001	200055	20034	5000 - OTR	AT18061000	Tax & Revenue - RPA	Reg
00025771	Lead Customer Service Tax Spec		V	11	0	74893	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	
00025898	Real Property Program Speciali		V	12	0	92656	1	1010001	200054	20035	5000 - OTR	AT18120000	Tax & Revenue - RPTA	
00025965	Senior Revenue Officer	1/8/2009	F	12	6	107046	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00025970	Senior Revenue Officer	4/12/1999	F	12	10	118558	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00026066	Senior Pension Benefits Specia		V	13	0	122164	1	1060020	200004	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	
00026107	Recordation Tax Specialist	6/1/2015	F	11	5	84517	1	1010001	200053	20036	5000 - OTR	AT18150000	Tax & Revenue - RPTA	Reg
00026150	Program Director	1/9/2017	F	15	8	181345	1	1060090	200092	20017	7000 - OFT	AT15000000	Finance & Treasury	Reg
00026199	Tax Fraud Specialist	12/14/2015	F	12	3	98412	1	1010001	200058	20037	5000 - OTR	AT18014000	Tax & Revenue - CO	Reg
00026202	Budget Administration Analyst	3/6/2006	F	14	10	162565	1	1010001	200032	20003	3000 - OBP	AT11000000	Budget and Planning	Reg
00026258	Senior Revenue Officer	10/25/2021	F	12	1	92656	1	1010001	200059	20038	5000 - OTR	AT18014000	Tax & Revenue - CO	Reg
00026324	Senior Revenue Officer	1/17/1984	F	12	10	118558	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00026329	Revenue Officer		V	11	0	74893	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	
00026333	Supervisory Customer Service T	3/3/1997	F	13	6	123874	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00026341	Staff Assistant	12/15/1997	F	09	10	80032	1	1010001	100151	20006	7000 - OFT	AT15000000	Finance & Treasury	Reg
00026342	Accountant	3/25/2024	F	12	6	107046	1	1010001	200016	20022	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00026349	Management Analyst	11/18/1985	F	13	9	134142	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00026362	Financial Analyst	12/1/1997	F	12	10	118558	1	1010001	200076	20013	7000 - OFT	AT15000000	Finance & Treasury	Reg
00026429	Supervisory Recordation Specia	4/3/2006	F	12	5	104168	1	1010001	200053	20036	5000 - OTR	AT18150000	Tax & Revenue - RPTA	Reg
00026431	Returns Processing Clerk		V	07	1	51456	1	1010001	200055	20034	5000 - OTR	AT18064000	Tax & Revenue - RPA	
00026487	Executive Assistant	11/12/1985	F	13	10	137565	1	1010001	100151	20031	5000 - OTR	AT18010000	Tax & Revenue - DCFO	Reg
00026519	Accounting Technician	1/5/1987	F	09	10	80032	1	1010001	200028	20033	5000 - OTR	AT18030000	Tax & Revenue - RAA	Reg
00026591	Executive Assistant	1/21/2009	F	12	10	118558	1	1010001	100151	20006	7000 - OFT	AT15000000	Finance & Treasury	Reg
00026605	Revenue Officer	3/10/1986	F	11	10	96547	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00026634	Staff Assistant	1/25/1993	F	11	10	96554	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00026712	Special Pay Analyst	11/3/2014	F	12	5	104168	1	1060020	200004	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg

00026788	Director Revenue Accounting A	10/12/1999	F	16	10	214712	1	1010001	200028	20033	5000 - OTR	AT18030000	Tax & Revenue - RAA	Reg
00026805	Legal Instruments Examiner	6/26/2006	F	08	10	72721	1	1010001	200053	20036	5000 - OTR	AT18150000	Tax & Revenue - RPTA	Reg
00026843	Operations Support Specialist	7/28/2025	F	11	10	96547	1	1010001	100109	20046	1000 - MGMT	AT12000000	Mgmt & Admin/Fin Ops	Reg
00026987	Customer Service Representativ	3/10/2025	F	08	10	72721	1	1010001	200076	20013	7000 - OFT	AT15000000	Finance & Treasury	Reg
00027010	Associate Treasurer Operation	7/17/2023	F	16	7	210908	1	1010001	200078	20008	7000 - OFT	AT15000000	Finance & Treasury	Reg
00027056	Senior Revenue Officer	9/2/1997	F	12	10	118558	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00027110	Financial Analyst	1/3/2011	F	12	5	104168	1	1010001	200088	20012	7000 - OFT	AT15000000	Finance & Treasury	Reg
00027212	Customer Service Tax Specialis		V	07	0	51456	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	
00027255	Customer Service Tax Specialis	8/14/2023	F	09	10	80032	1	1010001	100029	20039	5000 - OTR	AT18202000	Tax & Revenue - CSA	Reg
00027311	Contract Specialist	1/5/2015	F	13	10	137565	1	1010001	100022	20045	1000 - MGMT	AT12000000	Mgmt & Admin/Fin Ops	Reg
00027426	Senior Capital Budget Analyst	3/13/2023	F	13	6	123874	1	1010001	200030	20004	3000 - OBP	AT11000000	Budget and Planning	Reg
00027456	Payroll Technician	3/27/2023	F	07	7	62184	1	1060030	200009	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00027472	Payroll Specialist	5/2/2005	F	11	7	89329	1	1060020	200004	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00027510	Senior Auditor (Tax)	8/17/1992	F	13	10	137561	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00027513	Senior Systems Accountant	11/14/2005	F	13	10	137561	1	1010001	200028	20033	5000 - OTR	AT18030000	Tax & Revenue - RAA	Reg
00027522	Banking Operations Manager	1/3/2022	F	14	9	158522	1	1010001	200070	20011	7000 - OFT	AT15000000	Finance & Treasury	Reg
00027529	Financial Analyst	4/23/1988	F	12	5	104168	1	1010001	200070	20015	7000 - OFT	AT15000000	Finance & Treasury	Reg
00027536	Unit Manager	3/30/2009	F	13	6	123874	1	1010001	200054	20035	5000 - OTR	AT18120000	Tax & Revenue - RPTA	Reg
00027596	Deputy Controller		V	17	0	215236.5	1	1010001	200040	20019	2000 - OFOS	AT14000000	Fin Operations & Sys	
00027671	Director Operating Budget	12/7/2008	F	16	1	176948	1	1010001	200032	20003	3000 - OBP	AT11000000	Budget and Planning	Reg
00027682	Senior Financial Reporting and	3/5/2001	F	14	10	162565	1	1010001	200029	20005	3000 - OBP	AT11000000	Budget and Planning	Reg
00027685	Customer Service Specialist	3/2/2009	F	09	10	80032	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00027717	Accounting Manager	12/22/2008	F	15	7	176605	1	1010001	200016	20022	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00027746	Information Technology Special	10/26/2009	F	14	10	162565	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00027753	Office Production Assistant	1/13/2025	F	09	10	80032	1	1010001	100151	20002	3000 - OBP	AT11000000	Budget and Planning	Reg
00027779	Fiscal Analyst	7/17/2000	F	15	6	171867	1	1010001	200034	20028	4000 - ORA	AT17000000	Revenue Analysis	Reg
00027813	Management Analyst	3/16/1998	F	12	10	118558	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00028071	Chief Collections Division	8/31/2020	F	15	3	157652	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00028072	Tax Examining Technician		V	09	0	62158	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	
00028078	Auditor (Tax)	4/12/2021	F	11	6	86923	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00028079	Deputy Recorder of Deeds	4/20/2015	F	14	1	126178	1	1010001	200053	20036	5000 - OTR	AT18150000	Tax & Revenue - RPTA	Reg
00028080	Director Real Property Tax Ad	7/17/2023	F	16	5	199588	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00028081	Tax Fraud Specialist	11/19/2012	F	12	6	107046	1	1010001	200058	20037	5000 - OTR	AT18014000	Tax & Revenue - CO	Reg
00028084	Customer Service Specialist	4/18/2016	F	09	7	74074	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00028085	Auditor (Tax)	3/30/2009	F	12	9	115680	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00028086	Financial Analyst	10/6/2025	F	12	5	104168	1	1010001	200076	20013	7000 - OFT	AT15000000	Finance & Treasury	Reg
00028087	Information Technology Special	8/3/2020	F	14	7	150436	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00028088	Appraiser	5/1/2005	F	13	8	130717	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00028089	Customer Service Tax Specialis	8/28/2023	F	09	1	62158	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00028090	Appraiser	7/8/2019	F	12	4	101290	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00028091	Appraiser	12/26/2006	F	12	10	118558	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00028096	Customer Service Specialist	9/2/1997	F	11	10	96554	1	1010001	100029	20039	5000 - OTR	AT18202000	Tax & Revenue - CSA	Reg
00028097	Revenue Accounting Specialist	1/9/2006	F	12	6	107046	1	1010001	200028	20033	5000 - OTR	AT18030000	Tax & Revenue - RAA	Reg
00028098	Assistant General Counsel	7/3/2023	F	14	4	138307	1	1010001	100093	20031	5000 - OTR	AT18020000	Tax & Revenue - GC	Reg
00028099	Auditor (Tax)		V	12	0	92656	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	
00028100	Assistant General Counsel	6/24/2007	F	15	10	190823	1	1010001	100093	20031	5000 - OTR	AT18020000	Tax & Revenue - GC	Reg
00028102	Customer Service Specialist	3/3/2008	F	09	10	80032	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00028103	Supervisory Auditor (Tax)	4/3/2005	F	14	8	154479	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00028106	Tax Academy Specialist	3/30/2009	F	12	4	101290	1	1010001	200059	20038	5000 - OTR	AT18014000	Tax & Revenue - CO	Reg
00028110	Revenue Officer	9/13/2021	F	11	2	77299	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00028111	Senior Supervisory Auditor	7/3/2000	F	14	10	162565	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00028114	Fiscal Analyst	7/25/2005	F	15	7	176605	1	1010001	200034	20028	4000 - ORA	AT17000000	Revenue Analysis	Reg
00028119	Tax Examining Technician	8/8/2005	F	09	10	80032	1	1010001	200055	20034	5000 - OTR	AT18061000	Tax & Revenue - RPA	Reg
00028121	Geographic Information Systems	12/12/2016	F	13	7	127295	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00028122	Real Property Market Analyst	8/25/2014	F	13	7	127295	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00028123	Information Technology Speciai	10/26/2009	F	14	6	146393	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00028124	Revenue Officer (Advisor)	6/30/2014	F	13	3	113607	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00028126	Administrative Assistant	6/12/2005	F	11	10	96554	1	1010001	200058	20037	5000 - OTR	AT18014000	Tax & Revenue - CO	Reg
00028127	Customer Service Tax Specialis		V	09	0	62158	1	1010001	100029	20039	5000 - OTR	AT18202000	Tax & Revenue - CSA	

00028128	Auditor (Tax)	4/17/2005	F	12	10	118558	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00028129	Tax Fraud Manager	10/1/1997	F	14	8	154479	1	1010001	200058	20037	5000 - OTR	AT18014000	Tax & Revenue - CO	Reg
00028130	Customer Service System Analyst	2/16/2010	F	12	10	118558	1	1010001	100029	20039	5000 - OTR	AT18202000	Tax & Revenue - CSA	Reg
00028131	Senior Auditor (Tax)	2/17/2009	F	13	8	130717	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00028135	Tax Examining Technician	3/1/1999	F	09	10	80032	1	1010001	200055	20034	5000 - OTR	AT18061000	Tax & Revenue - RPA	Reg
00028139	Revenue Officer		V	11	0	74893	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	
00028146	Accountant (Capital Assets)	10/26/2020	F	12	8	112802	1	1010001	200016	20023	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00028148	Supervisory Auditor (Tax)	11/13/2007	F	14	8	154479	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00028149	Tax Examining Technician	12/31/2001	F	09	10	80032	1	1010001	200055	20034	5000 - OTR	AT18061000	Tax & Revenue - RPA	Reg
00028150	Information Technology Special	9/14/2009	F	14	10	162565	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00028151	Revenue Officer	1/20/1998	F	11	10	96547	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00028152	Tax Examining Technician	2/20/2006	F	09	10	80032	1	1010001	200055	20034	5000 - OTR	AT18063000	Tax & Revenue - RPA	Reg
00028153	Customer Service Representativ	7/20/2020	F	08	5	63711	IA	1010001	200076	20013	7000 - OFT	AT15000000	Finance & Treasury	Reg
00028156	Business Analyst	6/7/2021	F	13	6	123874	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00028160	Special Assistant	10/11/2022	F	13	10	137565	1	1010001	100151	20031	5000 - OTR	AT18010000	Tax & Revenue - DCFD	Reg
00028164	Policy Analyst	2/28/2022	F	13	7	127297	1	1010001	200081	20010	7000 - OFT	AT15000000	Finance & Treasury	Reg
00028165	Fiscal Analyst	12/2/2013	F	14	8	154479	1	1010001	200034	20028	4000 - ORA	AT17000000	Revenue Analysis	Reg
00028168	Operating Budget Manager	4/25/2011	F	15	10	190823	1	1010001	200032	20003	3000 - OBP	AT11000000	Budget and Planning	Reg
00028170	Information Technology Special	8/14/2023	F	14	10	162565	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00028171	Paralegal Specialist	2/28/2000	F	13	10	137565	1	1010001	100093	20031	5000 - OTR	AT18020000	Tax & Revenue - GC	Reg
00028174	Customer Service Specialist	3/2/2009	F	11	8	91740	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00028175	Customer Service Tax Specialis	6/21/2021	F	09	4	68116	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00028178	Supervisory Auditor (Tax)	10/1/1994	F	14	10	162565	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00028183	SENIOR FINANCIAL POLICY ADVISO		V	16	1	176948	1	1060105	100151	20040	1000 - MGMT	AT10000000	Executive Office	
00028187	Auditor (Tax)		V	12	0	92656	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	
00028188	Criminal Investigator	1/27/2014	F	13	10	142386	1	1010001	200058	20037	5000 - OTR	AT18014000	Tax & Revenue - CO	Reg
00028191	Auditor (Tax)	4/4/2005	F	12	10	118558	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00028192	Director Mgmt & Administration	5/12/1986	F	17	7	225100	1	1010001	100151	20040	1000 - MGMT	AT10000000	Executive Office	Reg
00032412	HR Specialist (Employee Benefi	4/24/2023	F	13	1	106763	1	1060020	100060	20042	1000 - MGMT	AT11100000	Office of Human Resources	Reg
00032462	Information Technology Special	6/22/2020	F	14	10	162565	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00032488	Capital Budget Advisor		V	14	0	126178	1	1010001	200030	20004	3000 - OBP	AT11000000	Budget and Planning	
00032523	Budget Technician	11/13/2018	F	08	5	63711	1	1010001	200032	20003	3000 - OBP	AT11000000	Budget and Planning	Reg
00032581	Financial Systems Advisor	11/12/2019	F	14	8	154479	1	1010001	200016	20022	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00032695	Auditor (Tax)	10/3/2004	F	12	10	118558	1	1010001	200058	20037	5000 - OTR	AT18014000	Tax & Revenue - CO	Reg
00032736	Appraiser	4/29/2019	F	13	4	117029	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00032739	Revenue Officer	10/30/2006	F	11	9	94141	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00032875	Senior Operating Budget Analyst	9/11/2023	F	13	10	137565	1	1010001	200032	20003	3000 - OBP	AT11000000	Budget and Planning	Reg
00032965	Technology & Innovation Office	3/30/2020	F	16	10	214712	1	1010001	100070	20048	6000 - OCIO	AT16100000	Chief Inform Officer - PPS	Reg
00033050	Supervisory Contract Specialis	7/5/2011	F	15	9	186083	1	1010001	100022	20045	1000 - MGMT	AT12000000	Mgmt & Admin/Fin Ops	Reg
00033150	Senior Operating Budget Analyst	6/21/2022	F	13	10	137565	1	1010001	200032	20003	3000 - OBP	AT11000000	Budget and Planning	Reg
00033200	Associate General Counsel	4/17/2006	F	16	10	214712	1	1010001	100093	20031	5000 - OTR	AT18020000	Tax & Revenue - GC	Reg
00033216	Deputy Assoc General Counsel	3/2/1998	F	16	10	214712	1	1010001	100093	20031	5000 - OTR	AT18020000	Tax & Revenue - GC	Reg
00033234	Training & Development Special	5/1/2023	F	12	8	112802	1	1060020	100148	20043	1000 - MGMT	AT11100000	Office of Human Resources	Reg
00033241	Executive Assistant	10/1/2002	F	14	10	162565	1	1010001	100151	20040	1000 - MGMT	AT10000000	Executive Office	Reg
00033524	Financial Systems Analyst	11/20/2023	F	12	10	118558	1	1010001	200029	20005	3000 - OBP	AT11000000	Budget and Planning	Reg
00033798	Auditor (Tax)	3/13/1997	F	12	10	118558	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00033951	Staff Assistant	10/2/2006	F	11	10	96554	1	1010001	100029	20039	5000 - OTR	AT18200000	Tax & Revenue - CSA	Reg
00033952	Supervisory IT Specialist	10/30/2006	F	15	10	190823	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00033953	Supervisory Revenue Officer		V	13	0	122164	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	
00033954	Customer Service Tax Specialis	3/16/2020	F	09	3	66130	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00033955	Management Analyst	1/23/2006	F	12	8	112802	1	1010001	200028	20033	5000 - OTR	AT18030000	Tax & Revenue - RAA	Reg
00033958	Supervisory Auditor (Tax)	10/11/2022	F	14	6	146393	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00033959	Information Technology Special	8/6/2007	F	14	10	162565	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00033961	Fiscal Analyst	2/9/2015	F	15	4	162390	1	1010001	200043	20030	4000 - ORA	AT17000000	Revenue Analysis	Reg
00033965	Assistant Operations Manager (8/20/2007	F	14	9	158522	1	1010001	200055	20034	5000 - OTR	AT18060000	Tax & Revenue - RPA	Reg
00033966	Tax Fraud Specialist	7/14/2014	F	12	3	98412	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00033968	Senior Auditor (Tax)		V	13	0	106763	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	
00033969	Auditor (Tax)		V	12	0	92656	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	
00033970	Deputy Director	2/12/2024	F	15	10	190823	1	1010001	200055	20034	5000 - OTR	AT18060000	Tax & Revenue - RPA	Temp

00034856	Fiscal Analyst	9/11/2023	F	15	10	190823	1	1010001	200034	20028	4000 - ORA	AT17000000	Revenue Analysis	Reg
00035093	Financial Database Analyst	12/27/2004	F	14	10	162565	1	1010001	200016	20023	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00035494	Associate General Counsel	2/7/2005	F	16	10	214711.3	1	1060105	100092	20044	1000 - MGMT	AT10000000	Executive Office	Reg
00035580	Associate General Counsel (Pub	11/9/2020	F	16	10	214712	1	1010001	100092	20044	1000 - MGMT	AT10000000	Executive Office	Reg
00035599	Operations Manager	2/19/2008	F	14	5	142350	1	1010001	100029	20039	5000 - OTR	AT18200000	Tax & Revenue - CSA	Reg
00035808	Assistant General Counsel	3/12/2001	F	15	10	190823	1	1060105	100092	20044	1000 - MGMT	AT10000000	Executive Office	Reg
00035940	Assistant General Counsel	4/30/2018	F	15	10	190823	1	1060105	100092	20044	1000 - MGMT	AT10000000	Executive Office	Reg
00035944	Assistant General Counsel	11/24/2008	F	15	9	186083	1	1010001	100093	20031	5000 - OTR	AT18020000	Tax & Revenue - GC	Reg
00036393	Human Resources Assistant	12/16/2024	F	07	7	62184	1	1060105	100058	20042	1000 - MGMT	AT11100000	Office of Human Resources	Reg
00037343	Senior Accountant	3/16/1998	F	13	10	137565	1	1010001	200016	20022	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00037369	Systems Accountant	8/20/2007	F	12	10	118558	1	1010001	200028	20033	5000 - OTR	AT18030000	Tax & Revenue - RAA	Reg
00037373	Appraiser	2/18/2020	F	12	5	104168	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00037375	Assessment Program Specialist	9/5/2017	F	11	6	86923	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00037376	Lead Legal Instruments Examine	5/26/2009	F	09	9	78046	1	1010001	200053	20036	5000 - OTR	AT18150000	Tax & Revenue - RPTA	Reg
00037377	Supervisory Appraiser	10/7/2013	F	14	6	146393	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00037378	Appraiser	7/14/2014	F	13	6	123873	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00037380	Appraiser	4/25/2022	F	11	2	77299	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00037381	Appraiser	6/12/2006	F	13	8	130717	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00037382	Appraiser	3/29/2021	F	12	1	92656	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00037383	AUDITOR		V	13	0	93069	1	1060105	100100	20026	8000 - OIO	AT13000000	Integrity & Oversight	Reg
00037384	Exemption Specialist	6/6/1983	F	13	10	137561	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00037386	Assessment Technician	3/24/2014	F	08	10	72721	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00037387	Continuous Improvement Officer	8/14/2023	F	15	10	190823	1	1010001	100151	20040	1000 - MGMT	AT10000000	Executive Office	Reg
00037389	Appraiser	2/14/2022	F	13	3	113607	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00038611	Appraiser	8/13/2001	F	14	10	162565	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00038612	IT Specialist (APPSW)	11/17/2025	F	13	10	137561	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00038774	Information Technology Special	2/16/2010	F	14	6	146393	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00039094	Appraiser	12/12/2005	F	13	10	137561	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00039261	Cash and Investment Manager	11/21/2022	F	15	4	162390	1	1010001	200070	20011	7000 - OFT	AT15000000	Finance & Treasury	Reg
00039371	Budget Reporting Advisor	1/17/2023	F	14	7	150436.7	1	1010001	200032	20003	3000 - OBP	AT11000000	Budget and Planning	Reg
00040052	Capital Budget/Cap Improv Prog	10/17/2005	F	15	6	171867	1	1010001	200030	20004	3000 - OBP	AT11000000	Budget and Planning	Reg
00040146	Financial Analyst	4/6/2015	F	09	8	76060	1	1010001	200076	20013	7000 - OFT	AT15000000	Finance & Treasury	Reg
00040317	Tax Fraud Specialist	12/31/2012	F	12	7	109924	1	1010001	200058	20037	5000 - OTR	AT18014000	Tax & Revenue - CO	Reg
00040318	Clerical Assistant	4/20/2015	F	06	10	60999	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00040320	Tax Examining Technician	12/21/1998	F	09	10	80032	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00040324	Clerical Assistant	9/19/2016	F	06	10	60999	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00040326	Supervisory Revenue Accounting	10/30/2006	F	14	9	158522	1	1010001	200028	20033	5000 - OTR	AT18030000	Tax & Revenue - RAA	Reg
00040327	Supervisory Revenue Officer	7/25/2016	F	13	1	106763	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00040328	Tax Examining Technician		V	09	0	62158	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00040329	Revenue Officer	5/21/1991	F	11	10	96547	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00040331	Revenue Officer	12/17/2001	F	11	10	96547	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00040333	Senior Revenue Officer	9/17/2007	F	12	6	107046	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00040335	Management and Program Analyst	5/14/2007	F	14	8	154479	1	1010001	200058	20037	5000 - OTR	AT18160000	Tax & Revenue - CO	Reg
00040336	Senior Auditor (Tax)	1/30/1989	F	13	10	137561	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00040337	Program Manager Center of Exc	11/21/2022	F	14	10	162565	1	1010001	100151	20031	5000 - OTR	AT18160000	Tax & Revenue - CO	Reg
00040339	Auditor (Tax)	6/8/2009	F	13	9	134139	1	1060119	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00040342	Audit Assistant	2/5/2018	F	08	7	67315	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00040345	Revenue Officer	1/9/2006	F	11	10	96547	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00040349	Revenue Officer	9/25/2023	F	09	3	66130	IA	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00040350	Revenue Officer	4/17/2005	F	11	10	96547	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00040352	Tax Auditor	3/27/2023	F	09	3	66130	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00040353	Revenue Officer		V	11	0	74893	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00040354	Auditor (Tax)		V	12	0	92656	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00040359	Customer Service Specialist	5/13/2019	F	09	3	66130	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00040360	Supervisory Information Techno		V	14	0	126178	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00040363	IT Specialist (APPSW)		V	14	0	126178	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00040364	IT Specialist (APPSW)	1/2/2024	F	14	10	162565	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00040365	Information Technology Special	10/26/2009	F	13	10	137561	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00040366	Information Technology Special	8/28/2023	F	14	1	126178	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg

00040371	Revenue Accounting Manager	7/15/2002	F	15	7	176605	1	1010001	200028	20033	5000 - OTR	AT18030000	Tax & Revenue - RAA	Reg
00040373	Lead Tax Fraud Specialist	1/21/2005	F	13	8	130717	1	1010001	200058	20037	5000 - OTR	AT18014000	Tax & Revenue - CO	Reg
00040374	Real Property Program Speciali	5/19/2014	F	12	7	109924	1	1010001	200054	20035	5000 - OTR	AT18120000	Tax & Revenue - RPTA	Reg
00040375	Real Property Program Speciali	8/10/2015	F	12	4	101290	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00040376	Real Property Program Speciali	8/8/2016	F	11	1	74893	1	1010001	200054	20035	5000 - OTR	AT18120000	Tax & Revenue - RPTA	Reg
00040377	Real Property Program Speciali	8/4/1997	F	12	9	115680	1	1010001	200054	20035	5000 - OTR	AT18120000	Tax & Revenue - RPTA	Reg
00040379	Director of Policy & Procedure	6/9/1997	F	16	10	214712	1	1010001	200024	20024	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00040380	Appraiser	9/17/2007	F	12	10	118558	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00040381	Tax Fraud Specialist	7/27/2015	F	12	7	109924	1	1010001	200058	20037	5000 - OTR	AT18014000	Tax & Revenue - CO	Reg
00040382	Appraiser	4/24/2023	F	11	1	74893	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00040383	Appraiser	7/10/2017	F	12	7	109924	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00042707	ASST GEN COUNSEL		V	15	0	169497.5	1	1010001	100092	20044	1000 - MGMT	AT10000000	Executive Office	
00043797	Audit Assistant	8/6/2007	F	09	10	80032	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00044035	Auditor (Tax)	11/13/2007	F	12	10	118558	1	1010001	200058	20037	5000 - OTR	AT18011000	Tax & Revenue - CO	Reg
00044453	Training & Development Special	4/24/2023	F	12	10	118558	1	1060020	100148	20043	1000 - MGMT	AT11100000	Office of Human Resources	Reg
00044567	Assoc General Counsel	1/20/2008	F	16	10	214712	1	1010001	100092	20044	1000 - MGMT	AT10000000	Executive Office	Reg
00045563	Fiscal Analyst	8/1/2022	F	15	10	190823	1	1010001	200036	20030	4000 - ORA	AT17000000	Revenue Analysis	Reg
00048166	Senior Auditor (Tax)	3/30/2009	F	13	10	137561	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00048167	Supervisory Revenue Officer	10/28/2019	F	13	6	123874	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00048168	Supervisor Revenue Officer	7/24/2005	F	13	10	137565	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00048169	Program Analyst	8/29/1988	F	14	10	162565	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00048170	Fiscal Analyst	7/20/2020	F	13	3	113607	1	1010001	200043	20030	4000 - ORA	AT17000000	Revenue Analysis	Reg
00048171	Senior Auditor (Tax)		V	13	0	106763	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	
00048172	Auditor (Tax)	10/13/2020	F	12	7	109924	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00048173	Lead Tax Fraud Specialist	5/14/2007	F	13	8	130717	1	1010001	200058	20037	5000 - OTR	AT18014000	Tax & Revenue - CO	Reg
00048174	Revenue Officer	9/6/2005	F	11	10	96547	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00048175	Tax Academy Specialist	12/12/2016	F	12	1	92656	1	1010001	200058	20037	5000 - OTR	AT18014000	Tax & Revenue - CO	Reg
00048176	Criminal Investigator	2/6/2017	F	13	10	142386	1	1010001	200058	20037	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00048177	Revenue Officer	2/3/1997	F	11	10	96547	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00048178	Tax Fraud Specialist	11/6/2023	F	12	2	95534	1	1010001	200058	20037	5000 - OTR	AT18014000	Tax & Revenue - CO	Reg
00048179	Senior Revenue Officer	8/27/2012	F	12	1	92656	1	1010001	200059	20038	5000 - OTR	AT18014000	Tax & Revenue - CO	Reg
00048180	Revenue Officer	7/23/2007	F	11	5	84517	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00048182	Revenue Officer	11/13/2006	F	11	5	84517	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00048185	Clerical Assistant		V	06	0	46437	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	
00048186	Audit Assistant	4/10/2023	F	08	10	72721	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00048187	Staff Assistant	5/2/2016	F	09	5	70102	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00048188	Auditor (Tax)		V	12	0	92656	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	
00048189	Auditor (Tax)	5/5/2025	F	12	7	109924	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00048190	Program Manager	11/6/2023	F	15	10	190823	1	1010001	100151	20031	5000 - OTR	AT18010000	Tax & Revenue - DCFO	Reg
00048192	Auditor (Tax)	11/21/2022	F	12	10	118558	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00048193	Chief Risk Officer	7/15/2013	F	17	7	225100	1	1010001	100151	20040	1000 - MGMT	AT10000000	Executive Office	Reg
00050909	Customer Service Representativ	1/24/2005	F	08	10	72721	1	1010001	200076	20013	7000 - OFT	AT15000000	Finance & Treasury	Reg
00063434	Fiscal Analyst	2/6/2006	F	15	9	186083	1	1010001	200043	20030	4000 - ORA	AT17000000	Revenue Analysis	Reg
00070277	Contract Specialist	3/31/2008	F	14	10	162565	1	1010001	100022	20045	1000 - MGMT	AT12000000	Mgmt & Admin/Fin Ops	Reg
00073608	Payroll Specialist	8/28/2023	F	09	7	74074	1	1060020	200004	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	Reg
00075254	Revenue Accounting Manager	5/15/1995	F	15	7	176605	1	1010001	200028	20033	5000 - OTR	AT18030000	Tax & Revenue - RAA	Reg
00075255	Policy Analyst	7/31/2023	F	12	5	104168	1	1010001	200081	20010	7000 - OFT	AT15000000	Finance & Treasury	Reg
00075265	Accountant		V	11	0	74893	1	1010001	200028	20033	5000 - OTR	AT18030000	Tax & Revenue - RAA	
00075870	Lead Customer Service Represen	4/7/2025	F	09	1	62159	1	1010001	200076	20013	7000 - OFT	AT15000000	Finance & Treasury	Reg
00076758	Customer Service Representativ	3/10/2025	F	07	3	55032	1	1010001	200076	20013	7000 - OFT	AT15000000	Finance & Treasury	Reg
00076891	Customer Service Representativ		V	07	1	51458	1	1010001	200076	20013	7000 - OFT	AT15000000	Finance & Treasury	
00077045	Accountant	4/4/2016	F	12	6	107046	1	1010001	200028	20033	5000 - OTR	AT18030000	Tax & Revenue - RAA	Reg
00077046	Appraiser	9/26/2022	F	13	2	110185	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00077047	Appraiser	7/28/2025	F	12	1	92656	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00077048	Senior Appraiser	4/22/2013	F	13	10	137561	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00077049	Management and Program Analyst	6/16/2025	F	12	10	118558	1	1010001	200055	20034	5000 - OTR	AT18063000	Tax & Revenue - RPA	Reg
00077050	Assistant General Counsel	3/14/2022	F	14	6	109794.8	1	1010001	100093	20031	5000 - OTR	AT18020000	Tax & Revenue - GC	Reg
00077052	Auditor (Tax)		V	12	0	92656	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	
00077053	HR Specialist Systems & Repor	2/27/2023	F	11	1	74893	1	1060020	100060	20042	1000 - MGMT	AT11100000	Office of Human Resources	Reg

00077055	Collections Supervisor	1/21/2020	F	12	10	118558	1	1060299	200049	20014	7000 - OFT	AT15000000	Finance & Treasury	Reg
00077057	Central Collections Unit Manag	7/1/2024	F	13	2	110185	1	1060299	200049	20014	7000 - OFT	AT15000000	Finance & Treasury	Reg
00077058	Financial Analyst	3/11/2024	F	11	7	89333	1	1060299	200049	20014	7000 - OFT	AT15000000	Finance & Treasury	Reg
00077059	Accountant	8/26/2013	F	12	10	118558	1	1060299	200049	20014	7000 - OFT	AT15000000	Finance & Treasury	Reg
00077060	Collections Representative	7/3/2023	F	08	6	65513	1	1060299	200049	20014	7000 - OFT	AT15000000	Finance & Treasury	Reg
00077062	Lead Collections Representativ	11/20/2023	F	10	3	72563	1	1010001	200076	20013	7000 - OFT	AT15000000	Finance & Treasury	Reg
00077368	Lead Customer Service Represen	4/18/2017	F	09	5	70102	1	1010001	200076	20013	7000 - OFT	AT15000000	Finance & Treasury	Reg
00077980	Operating Budget Advisor	2/16/2010	F	14	6	146393	1	1010001	200032	20003	3000 - OBP	AT11000000	Budget and Planning	Reg
00078019	Agency Fiscal Officer	1/8/2018	F	14	10	162565	IA	1060009	150003	10001	1000 - MGMT	AT12000000	Mgmt & Admin/Fin Ops	Reg
00078019	Agency Fiscal Officer	1/8/2018	F	14	10	162565	IA	1010001	100003	30073	1000 - MGMT	AT12000000	Mgmt & Admin/Fin Ops	Reg
00078203	Talent Acquisition Advisor	4/18/2022	F	13	2	110185	1	1060020	100060	20042	1000 - MGMT	AT11100000	Office of Human Resources	Reg
00078270	Revenue Officer	12/18/2023	F	11	6	86923	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00078271	Tax Examining Technician		V	09	0	62158	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	
00078272	Revenue Accounting Specialist	4/17/2005	F	12	8	112802	1	1010001	200028	20033	5000 - OTR	AT18030000	Tax & Revenue - RAA	Reg
00078277	Lead Tax Examining Technician	1/5/1998	F	10	10	87872	1	1010001	200055	20034	5000 - OTR	AT18061000	Tax & Revenue - RPA	Reg
00078278	Revenue Officer		V	11	0	74893	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	
00078279	Tax Examining Technician	3/3/2008	F	09	10	80032	1	1010001	200055	20034	5000 - OTR	AT18061000	Tax & Revenue - RPA	Reg
00078280	Appraiser	5/5/2014	F	12	6	107046	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00078282	Senior Appraiser		V	13	0	106763	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	
00078283	Senior Appraiser	8/3/2009	F	13	10	137561	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00078284	Appraiser	5/29/2005	F	13	10	137561	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00078285	Senior Appraiser	4/17/2012	F	13	8	130717	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00078286	Appraiser	10/31/2016	F	13	6	123873	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00078287	Appraiser	7/14/2025	F	12	1	92656	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00078288	Assessment Technician	2/16/2021	F	08	5	63711	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00078289	Assessment Technician	12/10/2018	F	08	5	63711	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00078290	Assessment Technician	1/9/2006	F	09	9	78046	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00078291	Staff Assistant		V	09	0	62159	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	
00078292	Tax Fraud Specialist	4/20/2015	F	12	2	95534	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00078293	REVENUE OFFICER		V	11	0	74893	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	
00078294	Tax Academy Specialist	1/21/2009	F	12	3	98412	1	1010001	200059	20038	5000 - OTR	AT18014000	Tax & Revenue - CO	Reg
00078295	Revenue Officer	1/12/2015	F	11	8	91735	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00078296	Supervisor Revenue Officer	4/1/1997	F	13	9	134142	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00078297	Revenue Officer	10/17/2005	F	11	5	84517	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00078298	Tax Examining Technician	4/7/2014	F	09	10	80032	1	1010001	200055	20034	5000 - OTR	AT18061000	Tax & Revenue - RPA	Reg
00078299	Tax Examining Technician	1/29/2001	F	09	8	76060	1	1010001	200055	20034	5000 - OTR	AT18061000	Tax & Revenue - RPA	Reg
00078300	Tax Examining Technician	10/5/2015	F	09	7	74074	1	1010001	200055	20034	5000 - OTR	AT18064000	Tax & Revenue - RPA	Reg
00078301	Contract Specialist	4/14/2008	F	13	8	130720	1	1010001	100022	20045	1000 - MGMT	AT12000000	Mgmt & Admin/Fin Ops	Reg
00078302	ACCOUNTANT		V	11	0	74893	1	1010001	200028	20033	5000 - OTR	AT18030000	Tax & Revenue - RAA	
00078337	Revenue Officer	5/8/2000	F	11	9	94141	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00082519	Accountant	3/13/2023	F	11	3	79705	1	1010001	200028	20033	5000 - OTR	AT18030000	Tax & Revenue - RAA	Reg
00082532	SENIOR ACCOUNTANT		V	13	0	122164	1	1010001	200016	20022	2000 - OFOS	AT14000000	Fin Operations & Sys	
00082534	Senior Accountant	12/11/2017	F	13	5	120452	1	1010001	200016	20023	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00082535	Accountant	6/29/2015	F	12	10	118558	1	1010001	200016	20022	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00082824	Assistant General Counsel	9/26/2022	F	15	10	190823	1	1060105	100092	20044	1000 - MGMT	AT10000000	Executive Office	Reg
00083180	TRIAL ATTORNEY	7/17/2023	F	14	5	159551	1	1010001	200058	20037	5000 - OTR	CB10006500	Bankruptcy & Finance Section	Reg
00083497	Customer Service Representativ	7/28/2025	F	07	10	67548	IA	1060151	700403	70602	7000 - OFT	AT15000000	Finance & Treasury	Reg
00083704	Quality Assurance Specialist	7/3/2023	F	11	10	96547	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00083705	Tax Fraud Specialist	3/31/2009	F	12	7	109924	1	1010001	200058	20037	5000 - OTR	AT18014000	Tax & Revenue - CO	Reg
00083706	Quality Assurance Specialist	10/28/2019	F	11	10	96547	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00084761	Customer Service Tax Specialis		V	07	1	51456	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	
00084762	Accounting Technician		V	08	0	56503	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	
00084765	Customer Service Tax Specialis	9/26/2022	F	09	2	64144	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00085158	Taxpayer Advocate Specialist	11/2/2015	F	11	5	84517	1	1010001	100029	20032	5000 - OTR	AT18010000	Tax & Revenue - DCFO	Reg
00085231	HR Program Manager (Classifica	9/30/2019	F	14	6	146393	1	1060020	100060	20042	1000 - MGMT	AT11100000	Office of Human Resources	Reg
00085428	Supervisory Customer Service T	2/22/2016	F	13	6	123874	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00085429	Real Property Program Speciali		V	12	0	92656	1	1010001	200054	20035	5000 - OTR	AT18120000	Tax & Revenue - RPTA	
00085430	Real Property Program Speciali		V	12	0	92656	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	
00085431	Accounting Technician	8/14/2023	F	08	10	72721	1	1010001	200054	20035	5000 - OTR	AT18120000	Tax & Revenue - RPTA	Reg

00085432	Risk and Compliance Specialist		V	14	0	126178	1	1010001	100151	20040	1000 - MGMT	AT10000000	Executive Office	
00085433	Supervisory Revenue Officer	7/20/2020	F	14	3	134264	1	1010001	200059	20038	5000 - OTR	AT18014000	Tax & Revenue - CO	Reg
00085434	Supervisory Revenue Officer	8/29/2022	F	14	6	146393	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00085435	Tax Examining Technician	8/7/2005	F	09	10	80032	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00085436	Tax Examining Technician		V	09	0	62158	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	
00085437	Financial Investments Manager	3/14/2022	F	14	10	162565	1	1010001	200070	20015	7000 - OFT	AT15000000	Finance & Treasury	Reg
00085438	Real Property Program Speciali		V	12	0	92656	1	1010001	200054	20035	5000 - OTR	AT18120000	Tax & Revenue - RPTA	
00085439	Legal Instruments Examiner	2/25/2002	F	08	10	72721	1	1010001	200054	20035	5000 - OTR	AT18150000	Tax & Revenue - RPTA	Reg
00085441	Fiscal Analyst	12/15/2014	F	15	10	190823	1	1010001	200036	20030	4000 - ORA	AT17000000	Revenue Analysis	Reg
00085442	Fiscal Analyst	6/15/2015	F	15	5	167129	1	1010001	200036	20030	4000 - ORA	AT17000000	Revenue Analysis	Reg
00085443	Fiscal Analyst	6/29/2015	F	15	4	162390	1	1010001	200036	20030	4000 - ORA	AT17000000	Revenue Analysis	Reg
00085505	Customer Service Representativ	11/5/2012	F	08	9	70919	1	1010001	200076	20013	7000 - OFT	AT15000000	Finance & Treasury	Reg
00085510	Customer Service Representativ	1/2/2024	F	07	2	53246	1	1010001	200076	20013	7000 - OFT	AT15000000	Finance & Treasury	Reg
00085586	Tax Examining Technician	12/29/2014	F	09	8	76060	1	1010001	200055	20034	5000 - OTR	AT18061000	Tax & Revenue - RPA	Reg
00085587	Tax Examining Technician	7/9/2007	F	09	8	76060	1	1010001	200055	20034	5000 - OTR	AT18061000	Tax & Revenue - RPA	Reg
00085632	Revenue Officer	1/9/2006	F	11	7	89329	1	1010001	200059	20038	5000 - OTR	AT18014000	Tax & Revenue - CO	Reg
00085633	Unclaimed Property Technician	2/18/2020	F	08	10	72721	1	1060086	200060	20016	7000 - OFT	AT15000000	Finance & Treasury	Reg
00085664	Risk and Compliance Specialist	2/9/2015	F	14	10	162565	1	1010001	100151	20040	1000 - MGMT	AT10000000	Executive Office	Reg
00085800	Risk and Compliance Specialist	3/9/2015	F	14	8	154479	1	1010001	100151	20040	1000 - MGMT	AT10000000	Executive Office	Reg
00085872	Financial Analyst	3/23/2015	F	12	7	109924	1	1060116	200094	20017	7000 - OFT	AT15000000	Finance & Treasury	Reg
00085934	Accounting Technician	6/11/2018	F	08	8	69117	1	1010001	200054	20035	5000 - OTR	AT18120000	Tax & Revenue - RPTA	Reg
00085936	Supervisory Returns Processing	10/23/2023	F	12	1	92664	1	1010001	200055	20034	5000 - OTR	AT18061000	Tax & Revenue - RPA	Term
00085937	Tax Examining Technician	12/31/2000	F	09	10	80032	1	1010001	200055	20034	5000 - OTR	AT18061000	Tax & Revenue - RPA	Reg
00085943	Lead Tax Examining Technician	12/26/2006	F	10	9	85685	1	1010001	200055	20034	5000 - OTR	AT18061000	Tax & Revenue - RPA	Reg
00085970	Customer Service Tax Specialis		V	07	0	51456	1	1010001	100029	20039	5000 - OTR	AT18202000	Tax & Revenue - CSA	
00086188	Human Resources Senior Advisor	9/12/2022	F	15	3	157652	1	1060020	100060	20042	1000 - MGMT	AT11100000	Office of Human Resources	Reg
00086207	Unclaimed Property Specialist	1/19/2021	F	11	3	79705	1	1060086	200060	20016	7000 - OFT	AT15000000	Finance & Treasury	Reg
00086210	LEGAL INSTRUMENTS EXAMINER		V	08	1	56503	1	1010001	200053	20036	5000 - OTR	AT18150000	Tax & Revenue - RPTA	
00086234	Program Analyst		V	13	0	122164	1	1010001	200055	20034	5000 - OTR	AT18060000	Tax & Revenue - RPA	
00087259	Accounting Technician	9/12/2022	F	08	4	61909	1	1010001	200059	20035	5000 - OTR	AT18120000	Tax & Revenue - RPTA	Reg
00088470	Senior Policy Analyst	3/7/2016	F	15	10	190823	1	1010001	200081	20010	7000 - OFT	AT19000000	Economic Devel Finance	Reg
00088929	Term- Communications Specialis		V	11	0	74893	Extra	1010001	100151	20031	5000 - OTR	AT18010000	Tax & Revenue - DCFO	
00090860	Contract Specialist	11/12/2013	F	13	9	134142	1	1010001	100022	20045	1000 - MGMT	AT12000000	Mgmt & Admin/Fin Ops	Reg
00091366	Assessment Technician	9/19/2016	F	08	7	67315	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00091424	Customer Service Tax Specialis		V	09	0	62158	1	1010001	100029	20039	5000 - OTR	AT18202000	Tax & Revenue - CSA	
00091425	Customer Service Tax Specialis	8/28/2023	F	07	10	67548	1	1010001	100029	20039	5000 - OTR	AT18202000	Tax & Revenue - CSA	Reg
00091426	Customer Service Tax Specialis	10/2/2017	F	09	8	76060	1	1010001	100029	20039	5000 - OTR	AT18202000	Tax & Revenue - CSA	Reg
00091427	Customer Service Tax Specialis	9/25/2023	F	09	6	72088	1	1010001	100029	20039	5000 - OTR	AT18202000	Tax & Revenue - CSA	Reg
00091428	Customer Service Tax Specialis	8/28/2023	F	09	2	64144	1	1010001	100029	20039	5000 - OTR	AT18202000	Tax & Revenue - CSA	Reg
00091429	Customer Service Tax Specialis	4/25/2022	F	09	4	68116	1	1010001	100029	20039	5000 - OTR	AT18202000	Tax & Revenue - CSA	Reg
00091430	Customer Service Tax Specialis	3/19/2023	F	07	3	55032	1	1010001	100029	20039	5000 - OTR	AT18202000	Tax & Revenue - CSA	Reg
00091431	Customer Service Tax Specialis	12/4/2023	F	09	1	62158	1	1010001	100029	20039	5000 - OTR	AT18202000	Tax & Revenue - CSA	Reg
00091432	Customer Service Tax Specialis	7/31/2023	F	09	3	66130	1	1010001	100029	20039	5000 - OTR	AT18202000	Tax & Revenue - CSA	Reg
00091433	Customer Service Tax Specialis	4/25/2022	F	09	3	66130	1	1010001	100029	20039	5000 - OTR	AT18202000	Tax & Revenue - CSA	Reg
00091434	Customer Service Tax Specialis	8/28/2023	F	07	3	55032	1	1010001	100029	20039	5000 - OTR	AT18202000	Tax & Revenue - CSA	Reg
00091436	Customer Service Tax Specialis		V	09	0	62158	1	1010001	100029	20039	5000 - OTR	AT18202000	Tax & Revenue - CSA	
00091437	Lead Customer Service Tax Spec	12/22/2008	F	11	5	84518	1	1010001	100029	20039	5000 - OTR	AT18202000	Tax & Revenue - CSA	Reg
00091438	Supervisory Customer Service T	7/19/2021	F	13	10	137565	1	1010001	100029	20039	5000 - OTR	AT18202000	Tax & Revenue - CSA	Reg
00091439	Appraiser	11/6/2023	F	13	1	106763	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00091440	Appraiser	3/20/2017	F	13	6	123873	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00091442	Assessment Technician		V	08	0	56503	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	
00091443	Appraiser	5/1/2017	F	13	6	123873	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00091444	Real Property Assessment Appea	10/1/2018	F	12	5	104168	1	1010001	200054	20035	5000 - OTR	AT18110000	Tax & Revenue - RPTA	Reg
00091445	Unclaimed Property Specialist	1/13/2014	F	11	8	91740	1	1060086	200060	20016	7000 - OFT	AT15000000	Finance & Treasury	Reg
00091446	Unclaimed Property Specialist	1/19/2021	F	11	7	89333	1	1060086	200060	20016	7000 - OFT	AT15000000	Finance & Treasury	Reg
00091447	Unclaimed Property Specialist	4/12/2021	F	09	5	70102	1	1060086	200060	20016	7000 - OFT	AT15000000	Finance & Treasury	Reg
00091448	Unclaimed Property Technician	9/19/2016	F	08	7	67315	1	1060086	200060	20016	7000 - OFT	AT15000000	Finance & Treasury	Reg
00091449	Collections Representative	5/21/2023	F	09	8	76060	1	1060299	200049	20014	7000 - OFT	AT15000000	Finance & Treasury	Reg
00091450	Collections Representative	10/20/2025	F	08	9	70919	1	1060299	200049	20014	7000 - OFT	AT15000000	Finance & Treasury	Reg

00091986	Accounts Payable Technician	10/24/2022	F	08	9	70919	IA	1010001	150017	10003	1000 - MGMT	AT12000000	Mgmt & Admin/Fin Ops	Reg
00091987	Financial Manager	10/13/2020	F	14	3	134264	IA	1010001	150003	10001	1000 - MGMT	AT12000000	Mgmt & Admin/Fin Ops	Reg
00092265	Customer Service Tax Specialis	8/15/2022	F	09	4	68116	1	1010001	100029	20039	5000 - OTR	AT18202000	Tax & Revenue - CSA	Reg
00092305	Senior Revenue Officer	9/9/2013	F	12	6	107046	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00093456	Collections Representative	7/17/2023	F	09	10	80032	1	1060299	200049	20014	7000 - OFT	AT15000000	Finance & Treasury	Reg
00093456	Collections Representative	12/31/2023	F	09	9	78046	1	1060299	200049	20014	7000 - OFT	AT15000000	Finance & Treasury	Reg
00093457	Lead Collections Representativ	2/12/2024	F	10	9	85689	1	1060299	200049	20014	7000 - OFT	AT15000000	Finance & Treasury	Reg
00094850	Banking Analyst	12/5/2022	F	12	10	118558	1	1010001	200070	20011	7000 - OFT	AT15000000	Finance & Treasury	Reg
00094853	Accountant	10/1/2018	F	12	1	92664	1	1060299	200049	20014	7000 - OFT	AT15000000	Finance & Treasury	Reg
00094854	Quality Assurance Program Anal	11/13/2007	F	13	9	134142	1	1060299	200049	20014	7000 - OFT	AT15000000	Finance & Treasury	Reg
00094857	Collections Representative	1/2/2024	F	07	10	67548	1	1060299	200049	20014	7000 - OFT	AT15000000	Finance & Treasury	Reg
00094858	Collections Representative	8/5/2019	F	09	4	68116	1	1060299	200049	20014	7000 - OFT	AT15000000	Finance & Treasury	Reg
00094864	Revenue Officer	9/4/2007	F	11	8	91735	1	1010001	200059	20038	5000 - OTR	AT18014000	Tax & Revenue - CO	Reg
00094865	Revenue Officer	7/23/2001	F	11	9	94141	1	1010001	200059	20038	5000 - OTR	AT18014000	Tax & Revenue - CO	Reg
00094866	Revenue Officer	8/11/2025	F	11	9	94141	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00094867	Revenue Officer	4/17/2005	F	11	6	86923	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00094868	Contract Specialist	10/1/2007	F	13	10	137565	1	1010001	100022	20045	1000 - MGMT	AT12000000	Mgmt & Admin/Fin Ops	Reg
00094869	Term-Accounting Technician	6/5/2023	F	07	7	62184	1	1010001	200054	20035	5000 - OTR	AT18120000	Tax & Revenue - RPTA	Term
00094870	Real Property Program Speciali	1/9/2006	F	12	5	104168	1	1010001	200054	20035	5000 - OTR	AT18120000	Tax & Revenue - RPTA	Reg
00094871	Supervisory Tax Academy Specia	1/16/2024	F	13	9	134142	1	1010001	200058	20037	5000 - OTR	AT18120000	Tax & Revenue - RPTA	Reg
00095569	Lead Customer Service Represen	1/2/1990	F	09	8	76060	IA	1010001	100071	60158	7000 - OFT	AT15000000	Finance & Treasury	Reg
00095570	Customer Service Representativ	3/24/2025	F	07	5	58608	1	1010001	200076	20013	7000 - OFT	AT15000000	Finance & Treasury	Reg
00096949	Lien Specialist	5/7/2012	F	11	5	84517	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00096950	Revenue Officer	6/29/2015	F	11	3	79705	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00096951	Data Analyst	8/19/2019	F	13	8	130717	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00096952	Data Analyst	5/9/2022	F	13	3	113607	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00096954	Management and Program Analyst	5/8/2023	F	12	7	109924	1	1010001	200055	20034	5000 - OTR	AT18060000	Tax & Revenue - RPA	Reg
00096955	Tax Policy Specialist		V	13	0	106763	1	1010001	200055	20034	5000 - OTR	AT18060000	Tax & Revenue - RPA	
00096956	Director of Collection and Enf	9/14/2020	F	16	9	214712	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00096958	Management & Program Analyst -	8/19/2019	F	12	7	109924	1	1010001	200055	20034	5000 - OTR	AT18060000	Tax & Revenue - RPA	Reg
00096959	Tax Examining Technician	11/16/2015	F	09	6	72088	1	1010001	200055	20034	5000 - OTR	AT18061000	Tax & Revenue - RPA	Reg
00096960	Unclaimed Property Coordinator	5/1/2006	F	11	9	94148	1	1060086	200060	20016	7000 - OFT	AT15000000	Finance & Treasury	Reg
00096961	Unclaimed Property Supervisor	2/6/2017	F	13	5	120452	1	1060086	200060	20016	7000 - OFT	AT15000000	Finance & Treasury	Reg
00097848	Customer Service Tax Specialis		V	09	0	62158	1	1010001	100029	20039	5000 - OTR	AT18202000	Tax & Revenue - CSA	
00098089	(Term) Senior Operating Budget	3/10/2025	F	13	8	130720	DIFS	3030304	200002	20050	3000 - OBP	AT11000000	Budget and Planning	Term
00098094	Financial Systems Specialist	1/4/1997	F	15	10	190823	1	1010001	100030	20020	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00098095	Director Financial Control & R	5/7/2001	F	16	9	214712	1	1010001	100030	20020	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00098096	Director Capital Budgets/Capi	1/21/2009	F	16	10	214712	DIFS	3030304	200002	20050	3000 - OBP	AT11000000	Budget and Planning	Reg
00098100	Budget Director (Cluster)	9/2/1997	F	16	10	214712	DIFS	3030304	200002	20050	3000 - OBP	AT11000000	Budget and Planning	Reg
00098106	Financial Systems & Accounting	4/18/2011	F	15	7	176605	1	1010001	100030	20020	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00098117	Revenue Accounting Manager	9/24/2012	F	15	10	190823	1	1010001	100030	20020	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00098119	Controller	3/31/1997	F	16	10	214712	1	1010001	100030	20020	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00098120	Accounting Manager	12/19/2011	F	14	10	162565	1	1010001	100030	20020	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00098121	Agency Fiscal Officer	1/5/1998	F	16	10	214712	1	1010001	100030	20020	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00098122	Grants Program Manager	1/3/2012	F	13	8	130720	1	1010001	100030	20020	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00098124	Accounts Payable Supervisor	10/13/1998	F	14	10	162565	1	1010001	100030	20020	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00098128	Budget Officer	3/2/1996	F	15	10	190823	DIFS	3030304	200002	20050	3000 - OBP	AT11000000	Budget and Planning	Reg
00098129	Budget System Operations Capit	12/19/2022	F	15	6	171867	DIFS	3030304	200002	20050	3000 - OBP	AT11000000	Budget and Planning	Reg
00099868	Fiscal Analyst	11/12/2019	F	15	6	171867	1	1010001	200036	20030	4000 - ORA	AT17000000	Revenue Analysis	Reg
00099876	Talent Acquisition Advisor	10/15/2019	F	13	4	117029	1	1060020	100060	20042	1000 - MGMT	AT11100000	Office of Human Resources	Reg
00099961	Budget Analyst	3/14/2022	F	12	8	112802	1	1060048	200028	20033	5000 - OTR	AT18030000	Tax & Revenue - RAA	Reg
00099962	Accountant		V	12	0	92656	1	1060048	200028	20033	5000 - OTR	AT18030000	Tax & Revenue - RAA	
00099963	Unclaimed Property Specialist	1/12/2015	F	11	5	84518	1	1060086	200060	20016	7000 - OFT	AT15000000	Finance & Treasury	Reg
00099964	Unclaimed Property Specialist	5/18/2015	F	11	5	84518	1	1060086	200060	20016	7000 - OFT	AT15000000	Finance & Treasury	Reg
00099965	Information Technology Special	4/25/2022	F	14	7	150436	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00099966	IT Project Coordinator		V	11	0	74893	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	
00099967	Information Technology Asset M		V	12	0	92656	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	
00099968	Information Technology Special	11/23/2020	F	14	7	150436	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00099969	Information Technology Special	10/26/2020	F	14	6	146393	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg

0009970	Information Technology Special	4/10/2023	F	14	10	162565	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
0009971	Information Technology Special	9/12/2022	F	14	10	162565	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
0009972	Financial Analyst	6/22/2020	F	13	6	123874	1	1010001	100151	20040	1000 - MGMT	AT10000000	Executive Office	Reg
0009981	Unclaimed Property Specialist	1/29/2001	F	11	6	86925	1	1060086	200060	20016	7000 - OFT	AT15000000	Finance & Treasury	Reg
00100163	HR Business Partner	2/26/2024	F	13	9	134142	1	1060020	100060	20042	1000 - MGMT	AT11100000	Office of Human Resources	Reg
00100299	Director Infrastructure Servi		V	16	0	176948	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	
00100300	Information Technology Manager	7/6/2021	F	15	10	190823	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00100302	Business Analyst	1/3/2022	F	13	10	137565	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00100303	Information Technology Special	4/24/2023	F	14	10	162565	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00100304	Information Technology Manager	3/30/2008	F	15	6	171867	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00100305	Information Technology Manager	1/17/2023	F	15	10	190823	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00104194	Risk and Compliance Specialist	7/19/2021	F	14	4	138307	1	1010001	100151	20040	1000 - MGMT	AT10000000	Executive Office	Reg
00105187	Financial Systems Support Spec	9/22/2025	F	12	5	104168	1	1010001	200016	20022	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00105293	Information Technology Asset M	3/13/2023	F	12	3	98412	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00105294	Information Technology Manager	10/23/2023	F	15	10	190823	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00105295	Information Technology Special		V	13	0	106763	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	
00105296	Technical Writer	9/11/2023	F	12	8	112802	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00105297	Azure Cloud Engineer		V	14	0	126178	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	
00105298	Budget Technician	10/12/2021	F	08	4	61909	1	1010001	200032	20003	3000 - OBP	AT11000000	Budget and Planning	Reg
00105348	PROGRAM ANALYST		V	12	0	92664	1	1010001	200094	20017	7000 - OFT	AT15000000	Finance & Treasury	
00105349	PROGRAM ANALYST		V	12	0	92664	1	1010001	200094	20017	7000 - OFT	AT15000000	Finance & Treasury	
00105352	Budget Technician	1/18/2022	F	08	3	60109	1	1010001	200030	20004	3000 - OBP	AT11000000	Budget and Planning	Reg
00105353	Budget Technician		V	08	0	56507	1	1010001	200032	20003	3000 - OBP	AT11000000	Budget and Planning	
00105354	Budget Technician	2/14/2022	F	08	4	61909	1	1010001	200032	20003	3000 - OBP	AT11000000	Budget and Planning	Reg
00105399	Program Director		V	15	0	169497.5	1	1060086	200060	20016	7000 - OFT	AT15000000	Finance & Treasury	
00106042	Operating Budget Manager		V	15	0	169497.5	1	1010001	200032	20003	3000 - OBP	AT11000000	Budget and Planning	
00106704	Talent Acquisition Advisor	9/26/2022	F	13	10	137565	1	1060020	100060	20042	1000 - MGMT	AT11100000	Office of Human Resources	Term
00107039	Human Resources Specialist HR	8/21/2023	F	09	9	78046	1	1060020	100060	20042	1000 - MGMT	AT11100000	Office of Human Resources	Reg
00108899	Human Resources Assistant	12/16/2024	F	07	4	56820	1	1060020	100060	20042	1000 - MGMT	AT11100000	Office of Human Resources	Reg
00109027	Human Resources Specialist	9/26/2022	F	13	2	110185	1	1060020	100060	20042	1000 - MGMT	AT11100000	Office of Human Resources	Reg
00109374	Lead Accounts Payable Technici	10/24/2022	F	09	10	80032	1	1010001	200016	20022	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00109634	Customer Service Tax Specialis	8/29/2022	F	07	3	55032	1	1010001	100029	20039	5000 - OTR	AT18202000	Tax & Revenue - CSA	Reg
00109635	Customer Service Tax Specialis	8/28/2023	F	09	3	66130	1	1010001	100029	20039	5000 - OTR	AT18202000	Tax & Revenue - CSA	Reg
00109636	Customer Service Tax Specialis		V	07	0	51456	1	1010001	100029	20039	5000 - OTR	AT18202000	Tax & Revenue - CSA	
00109637	Customer Service Tax Specialis	5/22/2023	F	09	2	64144	1	1010001	100029	20039	5000 - OTR	AT18202000	Tax & Revenue - CSA	Reg
00109638	Customer Service Tax Specialis		V	07	0	51456	1	1010001	100029	20039	5000 - OTR	AT18202000	Tax & Revenue - CSA	
00109639	Communications Specialist		V	09	0	62159	1	1010001	100151	20031	5000 - OTR	AT18010000	Tax & Revenue - DCFO	
00109640	Customer Service Tax Specialis	9/25/2023	F	09	2	64144	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00109641	Customer Service Tax Specialis	4/24/2023	F	09	8	76060	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00109642	Customer Service Tax Specialis	10/12/2021	F	09	1	62158	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00109643	Customer Service Tax Specialis	7/3/2023	F	09	10	80032	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00109644	Customer Service Tax Specialis	3/27/2023	F	09	3	66130	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00109645	Customer Service Tax Specialis	3/27/2023	F	09	2	64144	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00109646	Customer Service Tax Specialis	12/5/2022	F	09	6	72088	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00109670	Supervisory Customer Service T	8/14/2023	F	13	1	106763	1	1010001	100029	20039	5000 - OTR	AT18201000	Tax & Revenue - CSA	Reg
00109671	Accounts Payable Technician	11/21/2022	F	07	7	62184	1	1010001	200016	20022	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00109672	Accounts Payable Technician	11/21/2022	F	07	6	60396	1	1010001	200016	20022	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00109673	Senior Revenue Officer	4/17/2005	F	12	8	112802	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00109674	Revenue Officer	9/22/2025	F	11	5	84517	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00109675	Senior Revenue Officer	3/6/2017	F	12	3	98412	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00109676	Administrative Specialist		V	11	1	74893	1	1060020	200004	20025	2000 - OFOS	AT14100000	Fin Operations & Sys - PRS	
00109677	Information Technology Manager		V	15	0	169497.5	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	
00109678	IT Change Control Specialist	2/26/2024	F	13	10	137561	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00109682	IT Business Analyst		V	14	0	109999	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	
00109683	IT Business Analyst		V	14	0	109999	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	
00109684	IT Asset Management Specialist	3/30/2020	F	13	2	110185	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00109685	IT Business Analyst		V	14	0	109999	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	
00109686	IT Specialist (APPSW)	3/10/2025	F	14	6	146393	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00109687	Oracle Reporting and Analytics	2/12/2024	F	13	10	137565	1	1010001	100030	20020	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg

00109688	Data and Compliance Monitoring	8/25/2025	F	13	9	134142	1	1010001	100030	20020	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00109692	Director DIFS Support Center	11/20/2023	F	16	9	214712	1	1010001	100030	20020	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00109694	Change Management Specialist	12/18/2023	F	12	3	98415	1	1010001	100030	20020	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00109695	Change Management Specialist	10/6/2025	F	12	1	92664	1	1010001	100030	20020	2000 - OFOS	AT14000000	Fin Operations & Sys	Reg
00109897	Financial Data Advisor	1/17/2023	F	14	10	162565	1	1010001	100151	20002	3000 - OBP	AT11000000	Budget and Planning	Reg
00110219	Director Data Insight	5/1/2006	F	16	7	210908	1	1010001	200043	20030	4000 - ORA	AT17000000	Revenue Analysis	Reg
00110970	HR Business Partner	7/3/2023	F	13	10	137565	1	1060020	100060	20042	1000 - MGMT	AT11100000	Office of Human Resources	Term
00112279	Revenue Officer	4/13/2009	F	11	6	86923	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00112281	Revenue Officer	9/13/2021	F	11	1	74893	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	Reg
00112282	Tax Auditor	10/28/2019	F	09	4	68116	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00112283	Auditor (Tax)	11/17/2025	F	12	10	118558	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	Reg
00112284	Auditor (Tax)		V	12	0	92656	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	
00112290	IT Manager (Enterprise Program	12/15/2025	F	15	10	190823	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00112291	Information Technology Special	7/14/2025	F	14	9	158522	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00112292	IT Business Analyst		V	14	0	109999	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	
00112293	Information Technology Manager	10/20/2025	F	15	1	148172	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	Reg
00112294	IT Business Analyst		V	14	0	109999	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	
00112295	IT Business Analyst		V	14	0	109999	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	
00112296	FINANCIAL MGR		V	14	0	126178	1	1010001	100151	20006	7000 - OFT	AT15000000	Finance & Treasury	
00115619	Financial Manager		V	14	0	126178	1	1060090	200092	20017	7000 - OFT	AT15000000	Finance & Treasury	
00115620	Financial Investments Manager		V	14	0	126178	1	1060116	200094	20017	7000 - OFT	AT15000000	Finance & Treasury	
00115621	Unclaimed Property Analyst		V	12	0	92664	1	1060086	200060	20016	7000 - OFT	AT15000000	Finance & Treasury	
00115675	External Relations Officer	4/21/2025	F	15	10	190823	1	1010001	100151	20040	1000 - MGMT	AT10000000	Executive Office	Reg
00117534	Staff Assistant	10/6/2025	F	09	9	78046	1	1060299	200049	20014	7000 - OFT	AT15000000	Finance & Treasury	Reg
00117535	Collections Representative	11/3/2025	F	07	8	63972	1	1060299	200049	20014	7000 - OFT	AT15000000	Finance & Treasury	Temp
00117536	Collections Representative	11/3/2025	F	09	10	80032	1	1060299	200049	20014	7000 - OFT	AT15000000	Finance & Treasury	Reg
00117537	Collections Representative	11/3/2025	F	09	7	74074	1	1060299	200049	20014	7000 - OFT	AT15000000	Finance & Treasury	Reg
00117538	Collections Representative		V	09	0	62159	1	1060299	200049	20014	7000 - OFT	AT15000000	Finance & Treasury	
00117539	Collections Representative		V	09	0	62159	1	1060299	200049	20014	7000 - OFT	AT15000000	Finance & Treasury	
00117540	Collections Representative		V	09	0	62159	1	1060299	200049	20014	7000 - OFT	AT15000000	Finance & Treasury	
00117541	Collections Representative		V	09	0	62159	1	1060299	200049	20014	7000 - OFT	AT15000000	Finance & Treasury	
00117542	Information Technology Special		V	14	0	126178	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	
00117543	Information Technology Special		V	14	0	126178	1	1010001	100070	20048	6000 - OCIO	AT16200000	Chief Information Officer - IT	
00117544	Financial Analyst		V	12	0	92664	1	1060086	200060	20016	7000 - OFT	AT15000000	Finance & Treasury	
00117545	Financial Analyst		V	12	0	92664	1	1060086	200060	20016	7000 - OFT	AT15000000	Finance & Treasury	
00117546	Senior Auditor (Tax)		V	13	0	106763	1	1010001	200058	20037	5000 - OTR	AT18012000	Tax & Revenue - CO	
00117547	Senior Revenue Officer		V	12	0	92656	1	1010001	200059	20038	5000 - OTR	AT18015000	Tax & Revenue - CO	
00117548	Director Budget System Ops	4/8/2013	F	16	10	214712	1	1010001	200167	20074	3000 - OBP	AT11000000	Budget and Planning	Reg
00117549	Manager Budget System Operati	11/19/2000	F	15	8	181345	1	1010001	200167	20074	3000 - OBP	AT11000000	Budget and Planning	Reg
00117550	Budget Advisor Budget System	5/16/2016	F	14	5	142350	1	1010001	200167	20074	3000 - OBP	AT11000000	Budget and Planning	Reg
00117551	Budget Administration Analyst		V	14	1	126178	1	1010001	200167	20074	3000 - OBP	AT11000000	Budget and Planning	
00117552	Budget Administration Analyst		V	14	1	126178	1	1010001	200167	20074	3000 - OBP	AT11000000	Budget and Planning	

January 2026

Performance Oversight Hearing Questions – OCFO

IT UPGRADES: Project 100326 (IT UPGRADES) and Project 100327 (EQ9)

This project was established to fund the ongoing need for technology upgrade projects for the various systems required to support and enhance the agency’s mission of the financial management of the District while insuring the highest levels of integrity and security. Recent projects include migrating servers to Reston, establishing disaster recovery in the cloud and replacement of end-of-life servers, switches and other hardware.

A significant project funded by the IT Upgrades Project is our Cloud Contact Center as a Service (CCaaS) project. A cloud solution contract was successfully procured through cooperative procurement process on July 17th, 2025. Utilizing the Cooperative procurement and Migrator accelerator program has helped District find a cost effective and robust solution.

The Office of the Chief Financial Officer (OCFO) successfully launched a modern, cloud-based contact center solution leveraging Amazon Connect for the Central Collections Unit, Unclaimed Property and the OCFO IT Service Desk. This foundational deployment delivered a scalable platform designed to meet current needs and support future enhancements.

Key achievements include:

- Designed, built, and deployed a fully functional Amazon Connect instance tailored to OCFO requirements.
- AWS Environments Established
Provisioned and configured three distinct environments—Development, Sandbox, and Production—to support testing, training, and live operations.
- Intelligent Contact Center Capabilities Delivered
Implemented core features including:
 - Intelligent call routing
 - Interactive Voice Response (IVR)
 - User-friendly agent interfaces
 - Essential reporting and analytics

- Training and Documentation Completed
Developed comprehensive training materials and conducted sessions for agents and supervisors to ensure smooth adoption.

Some of the advantages gained are:

- Zero hardware investment required - agents need only a computer and reliable internet connection.
- Automatic maintenance handled by AWS with continuous updates, patches, and security enhancements.
- Instant scalability allows adding or removing agents with simple administrative portal changes.

Actions planned/scheduled for FY2026

OCFO is on track to retire the on-premises telephony system and deploy new capabilities to additional call centers by April 2026.

These call centers include:

- OTR Customer Service
- OTR E-Services
- OTR Audit and Criminal Investigations (Return Integrity Unit, Fraud Hotline)
- OTR Collections and Enforcement Administration
- OTR Recorder of Deeds
- OFOS District Integrated Financial System
- OFOS Payroll

We will continue enhancing call center operations and building on foundational capabilities. Potential future enhancements include ability to use:

- Natural Language Processing
- Real-Time Agent Assistance
- Predictive Analytics
- Omnichannel Intelligence

We are finalizing the contract to migrate the Image Data Capture System to the cloud and expect to begin in Q1 CY 2026. Following its successful migration, we plan to move the Managed File Transfer system to the cloud.

ITS/MITS (Project 100325)

The Core21 upgrade allowed the Modernized Integrated Tax System (MITS) to move from the contractor's (FAST) private cloud to Amazon Web Services (AWS) Cloud at no additional hosting cost. The project began in January 2025 and was completed in July 2025.

As part of this migration, the project team worked with OCTO to set up AWS Direct Connect for secure connectivity and a Key Management System (KMS) for data protection. This migration significantly improved the robustness and reliability of the MITS application, enhancing both Recovery Point Objective (RPO) and Recovery Time Objective (RTO). These improvements were successfully validated during a Disaster Recovery exercise on November 7, 2025. To ensure continuous improvement, we implemented two service packs:

- S21F (May 16, 2025) – Enhanced security, accessibility, and core product features.
- S21H (November 14, 2025) – Added more security improvements and new features.

User Experience Enhancements

- Faster and safer logins: We integrated MITS with Azure Entra, making logins quicker and more secure. We also improved taxpayer login by introducing SMS verification and promoting Passkeys for better security.
- Improved tax form usability: We redesigned and enhanced the accessibility and usability of tax form filings on mytax.dc.gov, working closely with business administration teams.

We do have the following additional actions planned/scheduled for FY2026:

- Migrating to AWS enables us to transition to a PostgreSQL database, which will significantly reduce MITS hosting costs—saving millions of dollars over the life of the contract. In addition to cost savings, PostgreSQL is expected to deliver improved performance and reliability.
- We also plan to upgrade from .NET 8 to .NET 10 (including a service pack) ahead of Microsoft's end-of-support timeline and migrate to Visual Studio 2026 to ensure continued security, compatibility, and access to the latest development tools.

Beyond infrastructure improvements, we will continue to enhance the usability and accessibility of the many web requests we manage. Additionally, we plan to engage a vendor to review these forms and provide recommendations to improve both compliance and our commitment to accessibility.

CARSS (Project 100334)

The District's asset management system, the Capital Asset Replacement Scheduling System (CARSS), contains a detailed inventory of all District-owned assets, including land, buildings, roads and streets, vehicles, and equipment. This system provides the basis for developing the District's capital improvements plan (CIP) as part of the annual budget process and determines the cost of deferred maintenance for current assets.

The OCFO utilized CARSS to produce its 2025 Long-Range Capital Financial Plan report in October, as is legislatively required, to report on the state of the District's assets and unfunded capital needs. The report identified those capital needs that were unable to be funded during the FY 2026-2031 CIP and provided a plan by which those unmet capital needs, including deferred maintenance, could be funded as soon as 2037.

Key highlights of this year's report include:

- \$16.70 billion of total capital needs identified; approximately \$10.71 billion of those needs are funded in the FY 2026 - 2031 CIP.
- \$5.98 billion of unfunded capital needs remain during the 6-year CIP period, up from \$2.99 billion last year, of which approximately \$2.44 billion is deferred maintenance.
- The increase in unmet capital needs is attributable to a net decrease in the size of the capital budget due to lower revenue forecasts compared to previous projections.
- The analysis shows that unmet capital needs can be funded as early as FY 2037, if the District commits 16.2% of its general fund budget to capital projects (12% to support debt service on borrowings and an average of 4.2% on pay-as-you-go cash funding) and no additional capital projects are added before addressing currently identified unmet needs.
- The District has a comparatively lower cost of borrowing compared to other cities and states due to strong bond ratings. The District's two main credits that are used to finance its Capital Improvements Plan are both very highly rated:

General Obligation bonds (Aa1/AA+/AA+) and In-come Tax Secured Revenue bonds (Aa1/AAA/AA+) by Moody's, S&P and Fitch, respectively.

- Challenges to executing this plan include economic uncertainty due to a variety of factors including persistent inflation, financial market volatility, and changes in federal trade, immigration and employment policies that could significantly affect the growth of the District's economy, particularly the continued contraction of the federal workforce.
- The nation's capital remains in a strong position compared to its peers to navigate these challenges and address its infrastructure needs due to prudent financial management policies (including strong reserves and highly funded pension and OPEB liabilities), a state-of-the-art asset management system, and a diverse local economy.

DIFS (Project 100328)

Phase 2 of the District Integrated Financial System ("DIFS") project went live as planned in 2025. The first module to go live in EPM was the CSFL on 05-SEPT-2025, followed by Operating, Revenue, and Capital modules on 14-OCT-2025 at which time agencies began formulating the FY2027 Budget. OBP will focus on working with the Mayor's budget team in January 2026. Following submission of the Mayor's budget to Council, the Council will then work with OBP to complete the final budget book using the Budget Formulation system in EPM. We anticipate use of the new Budget Formulation process in FY 2026 for the FY 2027 Budget will result in changes and enhancements to be implemented in subsequent releases during FY 2026. We have also identified enhancements and new functionality to be rolled out in Phase 3 (FY 2027) and Phase 4 (FY 2028) as needed.

Form 2 Detail: FY 2026 Enhancement Request

FY 2026 Agency Budget Request



Complete a separate Form 2 for each enhancement request. Agencies are limited to three Type D & E enhancement requests.

SECTION I. OVERVIEW Required for ALL requests

ENHANCEMENT TITLE* **Automated Testing as a Service (AtaaS)** ENHANCEMENT PRIORITY* # OUT OF #

AGENCY* Office of the Chief Financial Officer (OCFO) AGENCY CODE* ATO

AGENCY POINT OF CONTACT* James Snight POINT OF CONTACT EMAIL* James.snight@dc.gov

- REQUEST TYPE***
Mark the one request type that best describes this enhancement. No type is preferred over any other, but the questions in **Section II: Rationale** differ by type.
- A. Restore previous reduction or one-time funding } Complete Sections I-IV. Complete Section V to be considered for evidence rating.
 - B. Increased cost to maintain existing activity
 - C. Operational improvement with strong business case
 - D. Expand high-performing existing activity } Complete Sections I-V.
 - E. Completely new activity with highly likely or proven positive outcomes

FUNDING REQUEST*
Enter amount of Local Funds requested and indicate whether funds are one-time or recurring.

FY 2026 PERSONAL SERVICES (PS)	FY 2026 NON-PERSONAL SERVICES (NPS)	FY 2026 TOTAL REQUEST AMOUNT
\$0.00	\$878,040.00	\$878,040.00

ONE-TIME PARTIALLY RECURRING RECURRING

FUTURE COSTS*
If recurring, enter estimated costs over next four years.

TOTAL FY 2027	TOTAL FY 2028	TOTAL FY 2029
\$899,991.00	\$899,991.00	\$922,491.00

- ENHANCEMENT SUMMARY***
In your response:
- State the problem this enhancement is designed to address
 - Describe what the enhancement is and/or how it will work
 - Describe the impact the enhancement will have on the problem

Each month Oracle provides updates to the accounting, reporting and budgeting system used by the District. These updates must be tested to confirm they do not negatively impact existing business processes and procedures and we have only two weeks to test the new version each month before it goes live in production. We have contracted with a vendor to automate regression testing of the system to help us identify areas needing configuration or process changes. The implementation of this automated testing will be completed in Q2 of FY25 and funding will be needed in FY26 as the capital initiative transitions to operational support.

AGENCIES: Use this form to provide details about enhancement requests in your agency's FY 2026 budget request.

REQUIRED SECTIONS

- Sections I-IV for ALL requests.
- Section V for Type D/E requests. Types A, B, and C can complete this section to be considered for an evidence rating.
- Section VII for Type F requests.
- Section VI optional for all requests.

You must also submit a completed Form 2 Summary spreadsheet, including spend plan details for each enhancement request.

IMPORTANT: Agencies are limited to three Type D & E enhancement requests for FY 2026. If more than three Type D & E enhancements are submitted, OBPM will only consider and analyze the highest ranked.

RACIAL EQUITY BUDGET TOOL (REBT)
The Office of Racial Equity (ORE) has developed the Racial Equity Budget Tool (REBT) to guide agencies in assessing how their budgets benefit and/or negatively impact communities based on race, specifically Black,

EDITING RESTRICTIONS: This form uses editing restrictions to ensure consistent displays of information. If needed, the restrictions can be disabled by going to the Review tab at the top of the window, clicking on Protect, then Restrict Editing, and clicking Stop Protection. If prompted for a password, click OK.

Will legislative support be required to implement this enhancement?* YES NO
If yes, please submit a proposed BSA subtitle using Attachment D.

Form 2 Detail: FY 2026 Enhancement Request
 FY 2026 Agency Budget Request



SECTION II. RATIONALE *Required for ALL requests*

Has this enhancement request been submitted in past formulation cycles?* YES NO
 If yes, in which fiscal years was it submitted? Mark all that apply.
 FY 2025 FY 2024 FY 2023 FY 2022 FY 2021

What problem facing the District will this enhancement address and why does this problem exist?*
 Please provide as much detail as possible. Responses that identify and quantify specific problems will receive more favorable consideration.

Our accounting, reporting and budgeting system receives monthly updates to provide new features and functionality and to address bugs and process issues. Within two weeks we must test each new release before it migrates to production, identify and implement any changes needed as a result of the new release to ensure continuity of accounting and budgeting operations, and communicate out to District agencies any impacts of the monthly release. Automating the testing of business functions against the new release helps us manage the monthly release cycle by reducing the initial testing cycle, pinpointing processes that will fail or have issues when the new release goes live, test any needed workarounds, and communicate changes to agency personnel. Since we are subscribing to the system we do not have the ability to routinely delay the monthly release.

How does this enhancement address this problem and its underlying causes?*
 Please provide as much detail as possible. Responses that clearly demonstrate how the proposed enhancement will address the underlying causes will receive more favorable consideration. Please describe any data the agency has collected and/or any analysis the agency has conducted to understand the problem and its potential solutions.

This enhancement provides funding in the operating budget for the testing needed to maintain system integrity. The testing service reduces the testing time of a new release and allows us to be better prepared to test and communicate out any changes needed to continue business operations once the new release goes live.

Is this enhancement meant to sustain a project initiated with non-local funding (e.g. ARPA, federal grants, SPRs)? YES NO
 If yes, please provide a rationale for why these non-local funds are no longer available:
 Click or tap here to enter text.

How can this enhancement be scaled down to be accommodated within a constrained budget?*
 Scaling can occur in FY 2026 or the out-years and can be based on fewer residents served, scaled back staffing, adjusted implementation timeline, etc. Please add a new row for each scaled down scenario and rank the scaled down options in order of agency preference.

Use the text box below the table to provide additional detail. If the enhancement cannot be scaled down, please indicate so in the textbox.

RANKING	Describe each proposed approach to scale down the enhancement request and explain the expected impact with each scenario	FY 2026	FY 2027	FY 2028	FY 2029
1	[scenario title]: [description and expected impact]	[enter \$]	[enter \$]	[enter \$]	[enter \$]
2	[scenario title]: [description and expected impact]	[enter \$]	[enter \$]	[enter \$]	[enter \$]

Without modifying the existing, approved contract we cannot scale back services.

SECTION II. RATIONALE (continued) *Required for ALL requests*

QUESTIONS SPECIFIC TO ENHANCEMENT TYPE*

Mark the appropriate enhancement type and use the space below the table to answer the questions for that enhancement type.

IF YOUR ENHANCEMENT TYPE IS...	THEN ANSWER THESE QUESTIONS...
<input type="checkbox"/> A. Restore previous reduction or one-time funding	Why is the restoration of this reduction critical for the District at this time? What negative impact will result if this reduction is not restored? Please cite any relevant agency performance measures or other data that support your response.
<input checked="" type="checkbox"/> B. Increased cost to <u>maintain</u> existing activity	Why are costs increasing to maintain existing levels of service? What are the main cost drivers and what options have the agency already implemented or considered implementing to lower these costs? <i>Changes to the number of people served or the type of services provided should be categorized as a Type D request.</i>
<input type="checkbox"/> C. Operational improvement with a strong business case	How will this enhancement help the District save money in this or future fiscal years? How much will it save?
<input type="checkbox"/> D. Expand high-performing existing activity	Why is this program or activity considered to be high performing? How do the outputs or outcomes compare to those of similar programs within or outside of District government? Please cite any relevant agency performance measures or other data that support your response.
<input type="checkbox"/> E. Completely new activity with highly likely or proven positive outcomes	What will be the District's return on investment, as measured by how many and/or which District residents are served, or some other measure?

Responses to Questions*

The enhancement provides the operating budget funding needed to use this service. Our contract with our testing service provider calls for an increase every other year.

Form 2 Detail: FY 2026 Enhancement Request

FY 2026 Agency Budget Request

SECTION III. PERFORMANCE RATIONALE & IMPACT

Required for ALL requests

PERFORMANCE IMPACT

What data will the agency collect to understand the impact of this enhancement?*

Data may include measurements of the demand or need for programs over time, monitoring the quality and/or efficiency of programs, and/or assessing the impact of the enhancement on longer term goals. Please list specific data sources that will be collected and analyzed.

The OCFO will track the number of defects found/identified by the automated testing results vs. number of defects found/reported by users that should have been found by the automated testing scripts.

PERFORMANCE TEAM IS HERE TO HELP!

Need help thinking through this section or identifying data sources or performance measures? Reach out to your OBPM Performance Analyst or to Chief Performance Officer Lia Katz (lia.katz@dc.gov).

What challenges or risks does the agency anticipate related to this enhancement request? What mitigation or management strategies will the agency adopt to address those challenges?

The biggest risk to the District is having to rely on manual testing to try and identify processes impacted by an upgrade. Automated testing should create consistent test results when performing regression testing.

Will any performance measures currently in the agency's performance plan be impacted by this enhancement? What new measures will be added to understand the impact of the enhancement?*

- If you are proposing a new metric, write "NEW" in the columns for FY 2024 and FY 2025.
- Identify the "measure type: will the metric measure quantity; quality; efficiency; outcome; context; or is a District wide indicator of environmental trends.
- Please provide the previous year's data and the current year's target for the metric. Please also provide the anticipated targets for next year in the case that (a) the enhancement is funded and (b) the enhancement is not funded.

Form 2 Detail: FY 2026 Enhancement Request
 FY 2026 Agency Budget Request



Performance Measure	New for FY26?	Measure Type	Which direction is desired?	FY 2024 Actual	FY 2025 Target	Anticipated FY 2026 Target	
						With enhancement funding	Without enhancement funding
[enter]	[Select...]	[Select...]	[enter]	[enter]	[enter]	[enter]	[enter]
[enter]	[Select...]	[Select...]	[enter]	[enter]	[enter]	[enter]	[enter]
[enter]	[Select...]	[Select...]	[enter]	[enter]	[enter]	[enter]	[enter]

SECTION IV. BUDGETING FOR RACIAL EQUITY

Required for ALL requests

Is one of the goals of this enhancement to reduce or eliminate a racial equity gap?*

 YES NOWhich of the four goals in the District's [Racial Equity Action Plan](#) (REAP) or your agency specific REAP does this enhancement request advance?*. Check all that apply.

1. Improving DC Government staff understanding and commitment to achieving racial equity (e.g., training, capacity building, or use of racial equity tools)
2. Reducing or eliminating a known racial and ethnic inequity (domains include housing, health, economic opportunity, safety, education, neighborhood life, and civic engagement)
3. Enhancing opportunities to meaningfully engage DC residents in decision-making processes and strengthening partnerships
4. Improving DC government ability to be an equitable employer and engage in racially equitable hiring, promotion, and retention practices (e.g., building pipelines with HBCU/HSI, staff development funds, or community of practice on hiring)

What racial inequity or REAP sub-goal(s) does this enhancement request address?*

For example, health disparity, educational gap, disproportionality in housing, bolstering existing community resources, etc. Please be as specific as possible. For REAP goals, please list the specific action (e.g. 1B, see District's REAP for supporting actions).

Click or tap here to enter text.

What is the rationale for addressing the inequity in this way and/or with this program?*

For example, is the enhancement in response to a legislative requirement or mandate, community engagement efforts, demographic data, or something else?

Click or tap here to enter text.

In what ways have you meaningfully involved internal and external stakeholders in the development of your agency's budget request, including staff and communities of color?*. See ORE's [Meaningful Community Engagement Guide](#).

Click or tap here to enter text.

If this budget enhancement could potentially cause unintended benefits or burdens, please detail what racial or ethnic groups might be positively or negatively impacted.* For example, the location for a new airport could disrupt traffic patterns and create noise and air pollution that impact residents in the immediate vicinity, which could worsen racial health inequities.

Click or tap here to enter text.

SECTION V. EVIDENCE-BASED BUDGETING

Required for Type D & E requests. Optional for Types A, B & C.

This section is required for all Type D and E enhancement requests that would expand existing activities or launch completely new activities. This section may be completed for Type A, B and C enhancement requests to be considered for an evidence rating.

If the activities described in this enhancement are successfully implemented, what outcome(s) will improve?* OBPM expects that it will be possible for agencies to identify for almost all enhancement requests a new performance measure (Section III of this form) that aligns with the outcome measures identified in the evidence provided. If this is not feasible, please explain below.

Click or tap here to enter text.

What evidence supports the likelihood that this enhancement will achieve the desired outcome?*

Please describe the quantitative studies or other measures that show the outcomes of similar efforts previously undertaken in the District or in other cities (see sidebar for what OBPM will look for to review enhancements as evidence-based or supported by preliminary evidence). Provide links to cite your sources, which may include formal evaluation studies, evidence standards, or evidence clearinghouses.

Click or tap here to enter text.

Which parts of your enhancement are identical to the model(s) the evidence comes from?*

As applicable, your answer should describe sameness in the target population, intervention, and availability of inputs/resources needed, etc.

Click or tap here to enter text.

Which parts of your enhancement are different from the model(s) evaluated in the studies linked?*

Explain why deviations are necessary for success in DC.

Click or tap here to enter text.

Are you building or planning to build evidence to support this enhancement using a formal program evaluation?*

YES NO

If yes, please describe or link below to the planned evaluation design, research question(s), and timeline for results.

Click or tap here to enter text.

THE LAB@DC TEAM IS HERE TO HELP!

Have questions about the evidence? Email the.lab@dc.gov (and CC your OBPM Budget Analyst). The Lab can pre-review evidence, brainstorm future evaluation ideas, offer suggestions on where to look for evidence, and help you think through the evidence you've found.

HELPFUL TIPS TO GET STARTED:

In general, evidence ratings follow the principles listed below; the quality of the evidence provided and how well it matches the enhancement may also affect the final evidence rating:

- Experimental studies (also called randomized evaluations or randomized control trials) that show that a program or intervention *caused* an outcome may receive a **STRONG/4-star** evidence rating
- Quasi-experimental studies that suggest that a program or intervention *caused* an outcome by comparing outcomes between the group receiving the enhancement and a very similar group that doesn't receive the enhancement may receive a **MODERATE/3-star** evidence rating
- Correlational studies with appropriate statistical controls may receive a **PROMISING/2-star** evidence rating
- Before-and-after comparison studies (also called pre-post comparison studies) may receive a **SOME/1-star** evidence rating

Consider the positive impact(s) this enhancement should have on District residents or government operations. These are the outcome(s) of the enhancement. Try searching [Google Scholar](#) or a similar database for relevant existing research. Government evidence clearinghouses (like [What Works Clearinghouse](#) for education and [CrimeSolutions](#) for public safety) are also good places to search according to specialized topics.

SECTION VI. PROJECT PLAN *Optional for All Requests*

This section is optional. However, it is recommended for Type D and E enhancement requests that would expand existing activities or launch completely new activities.

This project plan can be used to show how the agency will deliver the intended results before the end of the fiscal year. Complete as best you can, knowing the plan might evolve.

PROJECT OWNER

Who is the single person who will be most responsible for this initiative? If the project owner must be hired, specify who will own the project until that time.

NAME Click or tap here to enter text.
 TITLE Click or tap here to enter text.
 EMAIL Click or tap here to enter text.
 PHONE Click or tap here to enter text.

BUSINESS PARTNER COORDINATION

What other agencies or stakeholders would be critical to this project’s success, and what communication have you had with them?

Click or tap here to enter text.

PROJECT TIMELINE

Describe below anticipated implementation milestones by quarter to show how the agency will deliver the intended results. Please identify specific months or dates, if known.

PREPARATION FOR PROJECT LAUNCH (before start of fiscal year)	
FY 2025 Q4	[enter]
FISCAL YEAR STARTS, FUNDS DISBURSED	
FY 2026 Q1	[enter]
FY 2026 Q2	[enter]
FY 2026 Q3	[enter]
FY 2026 Q4	[enter]

Form 2 Detail: FY 2026 Enhancement Request

FY 2026 Agency Budget Request

Complete a separate Form 2 for each enhancement request. Agencies are limited to three Type D & E enhancement requests.

SECTION I. OVERVIEW Required for ALL requests

ENHANCEMENT TITLE* ENHANCEMENT PRIORITY*
Ongoing Operations for Oracle EPM – District’s Budget Formulation Tool Replacing BFA/IBA **1** OUT OF **1**

AGENCY* AGENCY CODE*
 Office of the Chief Financial Officer **ATO**

AGENCY POINT OF CONTACT* POINT OF CONTACT EMAIL*
 Eric Cannady eric.cannady@dc.gov

REQUEST TYPE*
 Mark the one request type that best describes this enhancement. No type is preferred over any other, but the questions in **Section II: Rationale** differ by type.

A. Restore previous reduction or one-time funding
 B. Increased cost to maintain existing activity
 C. Operational improvement with strong business case

 D. Expand high-performing existing activity
 E. Completely new activity with highly likely or proven positive outcomes

Complete Sections I-IV. Complete Section V to be considered for evidence rating.
 Complete Sections I-V.

FUNDING REQUEST*
 Enter amount of Local Funds requested and indicate whether funds are one-time or recurring.

FY 2026 PERSONAL SERVICES (PS)	FY 2026 NON-PERSONAL SERVICES (NPS)	FY 2026 TOTAL REQUEST AMOUNT
\$943,714	0	\$943,714

ONE-TIME PARTIALLY RECURRING RECURRING

FUTURE COSTS*
 If recurring, enter estimated costs over next four years.

TOTAL FY 2027	TOTAL FY 2028	TOTAL FY 2029
\$960,229	\$977,033	\$994,131

ENHANCEMENT SUMMARY*
 In your response:

- State the problem this enhancement is designed to address
- Describe what the enhancement is and/or how it will work
- Describe the impact the enhancement will have on the problem

The District embarked on the DIFS project in FY2019 with the goal of replacing both SOAR – the District’s general ledger and BFA – the District’s budget formulation tool, as the underlying technologies within each application was outdated and costly to support. The District went live with Phase 1 of DIFS – SOAR replacement at the start of FY2023. At the start of FY2025 budget formulation cycle (FY2024), the District went live with IBA which was an Interim Budget solution for the BFA replacement. During FY2024 a team of OCFO and OCIO resources was formed to begin work on completing the migration to a new budget formulation tool – EPM (Enterprise Performance Management), an Oracle cloud-based product. This enhancement request is for 5 FTEs within the Office of Budget & Planning who will provide ongoing support, including managing all Level 1 tickets related to DIFS EPM, training, maintenance & operations of the EPM Budget application when it goes live for the District at the start of FY2026 in time for the Mayor’s FY27 budget formulation cycle.

AGENCIES: Use this form to provide details about enhancement requests in your agency’s FY 2026 budget request.

REQUIRED SECTIONS

- Sections I-IV for ALL requests.
- Section V for Type D/E requests. Types A, B, and C can complete this section to be considered for an evidence rating.
- Section VII for Type F requests.
- Section VI optional for all requests.

You must also submit a completed Form 2 Summary spreadsheet, including spend plan details for each enhancement request.

IMPORTANT: Agencies are limited to three Type D & E enhancement requests for FY 2026. If more than three Type D & E enhancements are submitted, OBPM will only consider and analyze the highest ranked.

RACIAL EQUITY BUDGET TOOL (REBT)
 The Office of Racial Equity (ORE) has developed the Racial Equity Budget Tool (REBT) to guide agencies in assessing how their budgets benefit and/or negatively impact communities based on race, specifically Black,

EDITING RESTRICTIONS: This form uses editing restrictions to ensure consistent displays of information. If needed, the restrictions can be disabled by going to the Review tab at the top of the window, clicking on Protect, then Restrict Editing, and clicking Stop Protection. If prompted for a password, click OK.

SECTION II. RATIONALE *Required for ALL requests*

Will legislative support be required to implement this enhancement?* YES NO
 If yes, please submit a proposed BSA subtitle using Attachment D.

Has this enhancement request been submitted in past formulation cycles?* YES NO
 If yes, in which fiscal years was it submitted? Mark all that apply.
 FY 2025 FY 2024 FY 2023 FY 2022 FY 2021

What problem facing the District will this enhancement address and why does this problem exist?*
 Please provide as much detail as possible. Responses that identify and quantify specific problems will receive more favorable consideration.

As a continuation of DIFS, the District will go live with EPM as the budget formulation and execution tool for the District replacing IBA on 10/1/2025 (start of FY2027 Budget Formulation). Once EPM goes live, the District will be required to ensure adequate staffing is maintained to meet the needs of quarterly EPM cloud upgrades that can and may impact the design and functionality deployed on 10/1 as well as business processes established upon go live that may be impacted by the quarterly updates. In addition to ensuring the EPM Budget formulation and execution are maintained and operational at the start of each fiscal year, the team supporting EPM for Budget formulation and execution will also be required to work cross agency/ and cross functionally within the OCFO to ensure all future approved budgets are loaded to DIFS timely for the start of the Budget execution period which occurs annually starting with the procurement requisitioning process in mid-August.

How does this enhancement address this problem and its underlying causes?*
 Please provide as much detail as possible. Responses that clearly demonstrate how the proposed enhancement will address the underlying causes will receive more favorable consideration. Please describe any data the agency has collected and/or any analysis the agency has conducted to understand the problem and its potential solutions.

This enhancement provides dedicated resources within the OCFO’s Office of Budget and Planning to provide ongoing functional support of the EPM Budget formulation and execution tool. The Oracle EPM application will have monthly updates pushed from Oracle so the District needs to ensure any changes pushed will function adequately and as expected.

Is this enhancement meant to sustain a project initiated with non-local funding (e.g. ARPA, federal grants, SPRs)? YES NO
 If yes, please provide a rationale for why these non-local funds are no longer available:
 The DIFS & IBA projects were funded by Capital funds. Once the District goes live with EPM on 10/1/2025 the staffing required to support EPM for Budget formulation and execution becomes an ongoing operating expense.

How can this enhancement be scaled down to be accommodated within a constrained budget?*
 Scaling can occur in FY 2026 or the out-years and can be based on fewer residents served, scaled back staffing, adjusted implementation timeline, etc. Please add a new row for each scaled down scenario and rank the scaled down options in order of agency preference.

Use the text box below the table to provide additional detail. If the enhancement cannot be scaled down, please indicate so in the textbox.

RANKING	Describe each proposed approach to scale down the enhancement request and explain the expected impact with each scenario	FY 2026	FY 2027	FY 2028	FY 2029
1	[scenario title]: enhancement cannot be scaled	[enter \$]	[enter \$]	[enter \$]	[enter \$]

Form 2 Detail: FY 2026 Enhancement Request
FY 2026 Agency Budget Request



2	[scenario title]: [description and expected impact]	[enter \$]	[enter \$]	[enter \$]	[enter \$]

The level of funding being requested is already at the minimum required level.

SECTION II. RATIONALE (continued) *Required for ALL requests*

QUESTIONS SPECIFIC TO ENHANCEMENT TYPE*

Mark the appropriate enhancement type and use the space below the table to answer the questions for that enhancement type.

IF YOUR ENHANCEMENT TYPE IS...	THEN ANSWER THESE QUESTIONS...
<input type="checkbox"/> A. Restore previous reduction or one-time funding	Why is the restoration of this reduction critical for the District at this time? What negative impact will result if this reduction is not restored? Please cite any relevant agency performance measures or other data that support your response.
<input checked="" type="checkbox"/> B. Increased cost to <u>maintain</u> existing activity	Why are costs increasing to maintain existing levels of service? What are the main cost drivers and what options have the agency already implemented or considered implementing to lower these costs? <i>Changes to the number of people served or the type of services provided should be categorized as a Type D request.</i>
<input type="checkbox"/> C. Operational improvement with a strong business case	How will this enhancement help the District save money in this or future fiscal years? How much will it save?
<input type="checkbox"/> D. Expand high-performing existing activity	Why is this program or activity considered to be high performing? How do the outputs or outcomes compare to those of similar programs within or outside of District government? Please cite any relevant agency performance measures or other data that support your response.
<input type="checkbox"/> E. Completely new activity with highly likely or proven positive outcomes	What will be the District's return on investment, as measured by how many and/or which District residents are served, or some other measure?

Responses to Questions*

The District embarked on the DIFS capital funded project in FY2019 with the goal of replacing both SOAR – the District’s general ledger and BFA – the District’s budget formulation tool, as the underlying technologies within each application was outdated and costly to support. The District went live with Phase 1 of DIFS – SOAR replacement at the start of FY2023. At the start of FY2025 budget formulation cycle (FY2024), the District went live with IBA which was an Interim Budget solution for the BFA replacement. During FY2024 a team of OCFO and OCIO resources was formed to begin work on completing the migration to a new budget formulation tool – EPM (Enterprise Performance Management), an Oracle cloud-based product. This operating impact of capital enhancement request is for 4 FTEs within the Office of Budget & Planning who will provide ongoing support, training, maintenance & operations of the EPM Budget application when it goes live for the District at the start of FY2026 in time for the Mayor’s FY27 budget formulation cycle.

Form 2 Detail: FY 2026 Enhancement Request

FY 2026 Agency Budget Request

SECTION III. PERFORMANCE RATIONALE & IMPACT

Required for ALL requests

PERFORMANCE IMPACT

What data will the agency collect to understand the impact of this enhancement?*

Data may include measurements of the demand or need for programs over time, monitoring the quality and/or efficiency of programs, and/or assessing the impact of the enhancement on longer term goals. Please list specific data sources that will be collected and analyzed.

OCFO has in place a process whereby users of EPM will enter Zendesk tickets. This will allow OCFO to track data in regards to user issues/concerns. In addition to this, EPM has a powerful feature called predictive planning that allows for better budget forecasting in the future. It does require a minimum of 3 years of historical data before it can be fully utilized.

PERFORMANCE TEAM IS HERE TO HELP!

Need help thinking through this section or identifying data sources or performance measures? Reach out to your OBPM Performance Analyst or to Chief Performance Officer Lia Katz (lia.katz@dc.gov).

What challenges or risks does the agency anticipate related to this enhancement request? What mitigation or management strategies will the agency adopt to address those challenges?

The Office of Budget & Planning does not foresee any risks or challenges if the enhancement request is approved, however if not approved there will be no dedicated resources to support the \$15 Million investment made by the District in replacing BFA with EPM.

Will any performance measures currently in the agency's performance plan be impacted by this enhancement? What new measures will be added to understand the impact of the enhancement?*

- If you are proposing a new metric, write "NEW" in the columns for FY 2024 and FY 2025.
- Identify the "measure type: will the metric measure quantity; quality; efficiency; outcome; context; or is a District wide indicator of environmental trends.
- Please provide the previous year's data and the current year's target for the metric. Please also provide the anticipated targets for next year in the case that (a) the enhancement is funded and (b) the enhancement is not funded.

Form 2 Detail: FY 2026 Enhancement Request
 FY 2026 Agency Budget Request



Performance Measure	New for FY26?	Measure Type	Which direction is desired?	FY 2024 Actual	FY 2025 Target	Anticipated FY 2026 Target	
						With enhancement funding	Without enhancement funding
[enter]	[Select...]	[Select...]	[enter]	[enter]	[enter]	[enter]	[enter]
[enter]	[Select...]	[Select...]	[enter]	[enter]	[enter]	[enter]	[enter]
[enter]	[Select...]	[Select...]	[enter]	[enter]	[enter]	[enter]	[enter]

SECTION IV. BUDGETING FOR RACIAL EQUITY

Required for ALL requests

Is one of the goals of this enhancement to reduce or eliminate a racial equity gap?*

 YES NO

Which of the four goals in the District's [Racial Equity Action Plan \(REAP\)](#) or your agency specific REAP does this enhancement request advance?* Check all that apply.

1. Improving DC Government staff understanding and commitment to achieving racial equity (e.g., training, capacity building, or use of racial equity tools)
2. Reducing or eliminating a known racial and ethnic inequity (domains include housing, health, economic opportunity, safety, education, neighborhood life, and civic engagement)
3. Enhancing opportunities to meaningfully engage DC residents in decision-making processes and strengthening partnerships
4. Improving DC government ability to be an equitable employer and engage in racially equitable hiring, promotion, and retention practices (e.g., building pipelines with HBCU/HSI, staff development funds, or community of practice on hiring)

What racial inequity or REAP sub-goal(s) does this enhancement request address?*

For example, health disparity, educational gap, disproportionality in housing, bolstering existing community resources, etc. Please be as specific as possible. For REAP goals, please list the specific action (e.g. 1B, see District's REAP for supporting actions).

N/A

What is the rationale for addressing the inequity in this way and/or with this program?*

For example, is the enhancement in response to a legislative requirement or mandate, community engagement efforts, demographic data, or something else?

N/A

In what ways have you meaningfully involved internal and external stakeholders in the development of your agency's budget request, including staff and communities of color?* See ORE's [Meaningful Community Engagement Guide](#).

Click or tap here to enter text.

If this budget enhancement could potentially cause unintended benefits or burdens, please detail what racial or ethnic groups might be positively or negatively impacted.* For example, the location for a new airport could disrupt traffic patterns and create noise and air pollution that impact residents in the immediate vicinity, which could worsen racial health inequities.

N/A

SECTION V. EVIDENCE-BASED BUDGETING

Required for Type D & E requests. Optional for Types A, B & C.

This section is required for all Type D and E enhancement requests that would expand existing activities or launch completely new activities. This section may be completed for Type A, B and C enhancement requests to be considered for an evidence rating.

If the activities described in this enhancement are successfully implemented, what outcome(s) will improve?* OBPM expects that it will be possible for agencies to identify for almost all enhancement requests a new performance measure (Section III of this form) that aligns with the outcome measures identified in the evidence provided. If this is not feasible, please explain below.

Click or tap here to enter text.

What evidence supports the likelihood that this enhancement will achieve the desired outcome?*

Please describe the quantitative studies or other measures that show the outcomes of similar efforts previously undertaken in the District or in other cities (see sidebar for what OBPM will look for to review enhancements as evidence-based or supported by preliminary evidence). Provide links to cite your sources, which may include formal evaluation studies, evidence standards, or evidence clearinghouses.

Click or tap here to enter text.

Which parts of your enhancement are identical to the model(s) the evidence comes from?*

As applicable, your answer should describe sameness in the target population, intervention, and availability of inputs/resources needed, etc.

Click or tap here to enter text.

Which parts of your enhancement are different from the model(s) evaluated in the studies linked?*

Explain why deviations are necessary for success in DC.

Click or tap here to enter text.

Are you building or planning to build evidence to support this enhancement using a formal program evaluation?*

YES NO

If yes, please describe or link below to the planned evaluation design, research question(s), and timeline for results.

Click or tap here to enter text.

THE LAB@DC TEAM IS HERE TO HELP!

Have questions about the evidence? Email the.lab@dc.gov (and CC your OBPM Budget Analyst). The Lab can pre-review evidence, brainstorm future evaluation ideas, offer suggestions on where to look for evidence, and help you think through the evidence you've found.

HELPFUL TIPS TO GET STARTED:

In general, evidence ratings follow the principles listed below; the quality of the evidence provided and how well it matches the enhancement may also affect the final evidence rating:

- Experimental studies (also called randomized evaluations or randomized control trials) that show that a program or intervention *caused* an outcome may receive a **STRONG/4-star** evidence rating
- Quasi-experimental studies that suggest that a program or intervention *caused* an outcome by comparing outcomes between the group receiving the enhancement and a very similar group that doesn't receive the enhancement may receive a **MODERATE/3-star** evidence rating
- Correlational studies with appropriate statistical controls may receive a **PROMISING/2-star** evidence rating
- Before-and-after comparison studies (also called pre-post comparison studies) may receive a **SOME/1-star** evidence rating

Consider the positive impact(s) this enhancement should have on District residents or government operations. These are the outcome(s) of the enhancement. Try searching [Google Scholar](#) or a similar database for relevant existing research. Government evidence clearinghouses (like [What Works Clearinghouse](#) for education and [CrimeSolutions](#) for public safety) are also good places to search according to specialized topics.

SECTION VI. PROJECT PLAN *Optional for All Requests*

This section is optional. However, it is recommended for Type D and E enhancement requests that would expand existing activities or launch completely new activities.

This project plan can be used to show how the agency will deliver the intended results before the end of the fiscal year. Complete as best you can, knowing the plan might evolve.

PROJECT OWNER

Who is the single person who will be most responsible for this initiative? If the project owner must be hired, specify who will own the project until that time.

NAME Click or tap here to enter text.
 TITLE Click or tap here to enter text.
 EMAIL Click or tap here to enter text.
 PHONE Click or tap here to enter text.

BUSINESS PARTNER COORDINATION

What other agencies or stakeholders would be critical to this project’s success, and what communication have you had with them?

Click or tap here to enter text.

PROJECT TIMELINE

Describe below anticipated implementation milestones by quarter to show how the agency will deliver the intended results. Please identify specific months or dates, if known.

PREPARATION FOR PROJECT LAUNCH (before start of fiscal year)	
FY 2025 Q4	[enter]
FISCAL YEAR STARTS, FUNDS DISBURSED	
FY 2026 Q1	[enter]
FY 2026 Q2	[enter]
FY 2026 Q3	[enter]
FY 2026 Q4	[enter]

Form 2 Detail: FY 2026 Enhancement Request

FY 2026 Agency Budget Request

Complete a separate Form 2 for each enhancement request. Agencies are limited to three Type D & E enhancement requests.

SECTION I. OVERVIEW Required for ALL requests

ENHANCEMENT TITLE* ENHANCEMENT PRIORITY*

DIFS Licenses # OUT OF #

AGENCY* AGENCY CODE*

Office of the Chief Financial Officer (OCFO) ATO

AGENCY POINT OF CONTACT* POINT OF CONTACT EMAIL*

James Snight James.snight@dc.gov

REQUEST TYPE*

Mark the one request type that best describes this enhancement. No type is preferred over any other, but the questions in **Section II: Rationale** differ by type.

A. Restore previous reduction or one-time funding
 B. Increased cost to maintain existing activity
 C. Operational improvement with strong business case
 D. Expand high-performing existing activity
 E. Completely new activity with highly likely or proven positive outcomes

Complete Sections I-IV. Complete Section V to be considered for evidence rating.

Complete Sections I-V.

FUNDING REQUEST*

Enter amount of Local Funds requested and indicate whether funds are one-time or recurring.

FY 2026 PERSONAL SERVICES (PS)	FY 2026 NON-PERSONAL SERVICES (NPS)	FY 2026 TOTAL REQUEST AMOUNT
\$0.00	\$972,512.00	\$972,512.00

ONE-TIME
 PARTIALLY RECURRING
 RECURRING

FUTURE COSTS*

If recurring, enter estimated costs over next four years.

TOTAL FY 2027	TOTAL FY 2028	TOTAL FY 2029
\$1,001,687.36	\$1,031,737.98	\$1,062,690.12

ENHANCEMENT SUMMARY*

In your response:

- State the problem this enhancement is designed to address
- Describe what the enhancement is and/or how it will work
- Describe the impact the enhancement will have on the problem

The District’s Integrated Financial System, a capital project implementation begun in 2018, rolled out to production in two phases. The first phase – Accounting and Budget Execution – went live at the start of FY23 and the cost of these two components received operating funds to cover the licenses at that time. The second phase – Budget Formulation – is scheduled to go live at the start of FY26 and an increase in operating funds is needed to fully cover the annual license fees. This increase will allow the OCFO to fully cover the annual licensing costs.

AGENCIES: Use this form to provide details about enhancement requests in your agency’s FY 2026 budget request.

REQUIRED SECTIONS

- Sections I-IV for ALL requests.
- Section V for Type D/E requests. Types A, B, and C can complete this section to be considered for an evidence rating.
- Section VII for Type F requests.
- Section VI optional for all requests.

You must also submit a completed Form 2 Summary spreadsheet, including spend plan details for each enhancement request.

IMPORTANT: Agencies are limited to **three Type D & E enhancement requests for FY 2026**. If more than three Type D & E enhancements are submitted, OBPM will only consider and analyze the highest ranked.

RACIAL EQUITY BUDGET TOOL (REBT)

The Office of Racial Equity (ORE) has developed the Racial Equity Budget Tool (REBT) to guide agencies in assessing how their budgets benefit and/or negatively impact communities based on race, specifically Black,

EDITING RESTRICTIONS: This form uses editing restrictions to ensure consistent displays of information. If needed, the restrictions can be disabled by going to the Review tab at the top of the window, clicking on Protect, then Restrict Editing, and clicking Stop Protection. If prompted for a password, click OK.

Will legislative support be required to implement this enhancement?* YES NO

If yes, please submit a proposed BSA subtitle using Attachment D.

Has this enhancement request been submitted in past formulation cycles?* YES NO

If yes, in which fiscal years was it submitted? Mark all that apply.

FY 2025
 FY 2024
 FY 2023
 FY 2022
 FY 2021

SECTION II. RATIONALE *Required for ALL requests*

What problem facing the District will this enhancement address and why does this problem exist?*

Please provide as much detail as possible. Responses that identify and quantify specific problems will receive more favorable consideration.

The District has fully funded the implementation costs of the DIFS project as a capital expenditure in the capital budget, but once the system goes live it becomes an operational support expenditure. The OCFO received funding in FY23 to cover the licensing cost of phase one of the project becoming operational. In order to fully fund the annual licensing costs once phase two goes live at start of FY26, additional funding is needed to cover the annual licensing/subscription costs.

How does this enhancement address this problem and its underlying causes?*

Please provide as much detail as possible. Responses that clearly demonstrate how the proposed enhancement will address the underlying causes will receive more favorable consideration. Please describe any data the agency has collected and/or any analysis the agency has conducted to understand the problem and its potential solutions.

The requested funding covers the FY27 Budget Formulation process that will be used starting with the budget cycle in FY26, allowing agencies to submit their annual budget requests for review by the Mayor’s budget team and then proceeding through the various Mayor/Council/Congress review and approval processes.

Is this enhancement meant to sustain a project initiated with non-local funding (e.g. ARPA, federal grants, SPRs)?

If yes, please provide a rationale for why these non-local funds are no longer available:

YES NO

Click or tap here to enter text.

How can this enhancement be scaled down to be accommodated within a constrained budget?*

Scaling can occur in FY 2026 or the out-years and can be based on fewer residents served, scaled back staffing, adjusted implementation timeline, etc. Please add a new row for each scaled down scenario and rank the scaled down options in order of agency preference.

Use the text box below the table to provide additional detail. If the enhancement cannot be scaled down, please indicate so in the textbox.

RANKING	Describe each proposed approach to scale down the enhancement request and explain the expected impact with each scenario	FY 2026	FY 2027	FY 2028	FY 2029
1	FULL FUNDING: Needed to meet our contractual obligation	\$972,512	\$1,001,687	\$1,031,738	\$1,062,690

These are the additional license costs related to the budget component of DIFS.

SECTION II. RATIONALE (continued) *Required for ALL requests*

QUESTIONS SPECIFIC TO ENHANCEMENT TYPE*

Mark the appropriate enhancement type and use the space below the table to answer the questions for that enhancement type.

IF YOUR ENHANCEMENT TYPE IS...	THEN ANSWER THESE QUESTIONS...
<input type="checkbox"/> A. Restore previous reduction or one-time funding	Why is the restoration of this reduction critical for the District at this time? What negative impact will result if this reduction is not restored? Please cite any relevant agency performance measures or other data that support your response.
<input checked="" type="checkbox"/> B. Increased cost to <u>maintain</u> existing activity	Why are costs increasing to maintain existing levels of service? What are the main cost drivers and what options have the agency already implemented or considered implementing to lower these costs? <i>Changes to the number of people served or the type of services provided should be categorized as a Type D request.</i>
<input type="checkbox"/> C. Operational improvement with a strong business case	How will this enhancement help the District save money in this or future fiscal years? How much will it save?
<input type="checkbox"/> D. Expand high-performing existing activity	Why is this program or activity considered to be high performing? How do the outputs or outcomes compare to those of similar programs within or outside of District government? Please cite any relevant agency performance measures or other data that support your response.
<input type="checkbox"/> E. Completely new activity with highly likely or proven positive outcomes	What will be the District's return on investment, as measured by how many and/or which District residents are served, or some other measure?

Responses to Questions*

Initial cost in FY26 fully funds the annual licenses following implementation of Budget Formulation. The annual increase covers the yearly cost increase in the contract. Because this system is used by all agencies to record transactions throughout the year to allow the OCFO to create the Annual Comprehensive Financial Report mandated by law the recompetee of the contract in FY29 will present an opportunity for determining if any adjustments can be made to the license requirements to decrease costs.

Form 2 Detail: FY 2026 Enhancement Request
 FY 2026 Agency Budget Request

SECTION III. PERFORMANCE RATIONALE & IMPACT

Required for ALL requests

PERFORMANCE IMPACT

What data will the agency collect to understand the impact of this enhancement?*

Data may include measurements of the demand or need for programs over time, monitoring the quality and/or efficiency of programs, and/or assessing the impact of the enhancement on longer term goals. Please list specific data sources that will be collected and analyzed.

In addition to publishing the ACFR, PAFR and Budget Book each year, the OCFO conducts user surveys and receives enhancement and change requests from users that allow it to configure the accounting, reporting and budgeting systems to meet the evolving needs of the District.

PERFORMANCE TEAM IS HERE TO HELP!

Need help thinking through this section or identifying data sources or performance measures? Reach out to your OBPM Performance Analyst or to Chief Performance Officer Lia Katz (lia.katz@dc.gov).

What challenges or risks does the agency anticipate related to this enhancement request? What mitigation or management strategies will the agency adopt to address those challenges?

If unable to fully fund the licensing costs of the District's financial system, the agency would be severely hindered in the ability to accurately report on the District's finances and to assist in the preparation of the annual budget. Preparation of the required annual ACFR would also be severely jeopardized. The District's bond ratings would likely be negatively impacted as well.

Will any performance measures currently in the agency's performance plan be impacted by this enhancement? What new measures will be added to understand the impact of the enhancement?*

- If you are proposing a new metric, write "NEW" in the columns for FY 2024 and FY 2025.
- Identify the "measure type: will the metric measure quantity; quality; efficiency; outcome; context; or is a District wide indicator of environmental trends.
- Please provide the previous year's data and the current year's target for the metric. Please also provide the anticipated targets for next year in the case that (a) the enhancement is funded and (b) the enhancement is not funded.

Form 2 Detail: FY 2026 Enhancement Request
 FY 2026 Agency Budget Request



Performance Measure	New for FY26?	Measure Type	Which direction is desired?	FY 2024 Actual	FY 2025 Target	Anticipated FY 2026 Target	
						With enhancement funding	Without enhancement funding
Streamlined, integrated budget formulation process	Yes	Efficiency	Improvement	N/A	N/A	Reduction in issues with budget formulation	Continued issues as the budget process unfolds
[enter]	[Select...]	[Select...]	[enter]	[enter]	[enter]	[enter]	[enter]
[enter]	[Select...]	[Select...]	[enter]	[enter]	[enter]	[enter]	[enter]

SECTION IV. BUDGETING FOR RACIAL EQUITY

Required for ALL requests

Is one of the goals of this enhancement to reduce or eliminate a racial equity gap?*

 YES NO

Which of the four goals in the District's [Racial Equity Action Plan](#) (REAP) or your agency specific REAP does this enhancement request advance?*. Check all that apply.

- 1. Improving DC Government staff understanding and commitment to achieving racial equity (e.g., training, capacity building, or use of racial equity tools)
- 2. Reducing or eliminating a known racial and ethnic inequity (domains include housing, health, economic opportunity, safety, education, neighborhood life, and civic engagement)
- 3. Enhancing opportunities to meaningfully engage DC residents in decision-making processes and strengthening partnerships
- 4. Improving DC government ability to be an equitable employer and engage in racially equitable hiring, promotion, and retention practices (e.g., building pipelines with HBCU/HSI, staff development funds, or community of practice on hiring)

What racial inequity or REAP sub-goal(s) does this enhancement request address?*

For example, health disparity, educational gap, disproportionality in housing, bolstering existing community resources, etc. Please be as specific as possible. For REAP goals, please list the specific action (e.g. 1B, see District's REAP for supporting actions).

[Click or tap here to enter text.](#)

What is the rationale for addressing the inequity in this way and/or with this program?*

For example, is the enhancement in response to a legislative requirement or mandate, community engagement efforts, demographic data, or something else?

[Click or tap here to enter text.](#)

In what ways have you meaningfully involved internal and external stakeholders in the development of your agency's budget request, including staff and communities of color?*. See ORE's [Meaningful Community Engagement Guide](#).

[Click or tap here to enter text.](#)

If this budget enhancement could potentially cause unintended benefits or burdens, please detail what racial or ethnic groups might be positively or negatively impacted.* For example, the location for a new airport could disrupt traffic patterns and create noise and air pollution that impact residents in the immediate vicinity, which could worsen racial health inequities.

[Click or tap here to enter text.](#)

SECTION V. EVIDENCE-BASED BUDGETING

Required for Type D & E requests. Optional for Types A, B & C.

This section is required for all Type D and E enhancement requests that would expand existing activities or launch completely new activities. This section may be completed for Type A, B and C enhancement requests to be considered for an evidence rating.

If the activities described in this enhancement are successfully implemented, what outcome(s) will improve?* OBPM expects that it will be possible for agencies to identify for almost all enhancement requests a new performance measure (Section III of this form) that aligns with the outcome measures identified in the evidence provided. If this is not feasible, please explain below.

Click or tap here to enter text.

What evidence supports the likelihood that this enhancement will achieve the desired outcome?*

Please describe the quantitative studies or other measures that show the outcomes of similar efforts previously undertaken in the District or in other cities (see sidebar for what OBPM will look for to review enhancements as evidence-based or supported by preliminary evidence). Provide links to cite your sources, which may include formal evaluation studies, evidence standards, or evidence clearinghouses.

Click or tap here to enter text.

Which parts of your enhancement are identical to the model(s) the evidence comes from?*

As applicable, your answer should describe sameness in the target population, intervention, and availability of inputs/resources needed, etc.

Click or tap here to enter text.

Which parts of your enhancement are different from the model(s) evaluated in the studies linked?*

Explain why deviations are necessary for success in DC.

Click or tap here to enter text.

Are you building or planning to build evidence to support this enhancement using a formal program evaluation?*

YES NO

If yes, please describe or link below to the planned evaluation design, research question(s), and timeline for results.

Click or tap here to enter text.

THE LAB@DC TEAM IS HERE TO HELP!

Have questions about the evidence? Email the.lab@dc.gov (and CC your OBPM Budget Analyst). The Lab can pre-review evidence, brainstorm future evaluation ideas, offer suggestions on where to look for evidence, and help you think through the evidence you've found.

HELPFUL TIPS TO GET STARTED:

In general, evidence ratings follow the principles listed below; the quality of the evidence provided and how well it matches the enhancement may also affect the final evidence rating:

- Experimental studies (also called randomized evaluations or randomized control trials) that show that a program or intervention *caused* an outcome may receive a **STRONG/4-star** evidence rating
- Quasi-experimental studies that suggest that a program or intervention *caused* an outcome by comparing outcomes between the group receiving the enhancement and a very similar group that doesn't receive the enhancement may receive a **MODERATE/3-star** evidence rating
- Correlational studies with appropriate statistical controls may receive a **PROMISING/2-star** evidence rating
- Before-and-after comparison studies (also called pre-post comparison studies) may receive a **SOME/1-star** evidence rating

Consider the positive impact(s) this enhancement should have on District residents or government operations. These are the outcome(s) of the enhancement. Try searching [Google Scholar](#) or a similar database for relevant existing research. Government evidence clearinghouses (like [What Works Clearinghouse](#) for education and [CrimeSolutions](#) for public safety) are also good places to search according to specialized topics.

SECTION VI. PROJECT PLAN *Optional for All Requests*

This section is optional. However, it is recommended for Type D and E enhancement requests that would expand existing activities or launch completely new activities.

This project plan can be used to show how the agency will deliver the intended results before the end of the fiscal year. Complete as best you can, knowing the plan might evolve.

PROJECT OWNER

Who is the single person who will be most responsible for this initiative? If the project owner must be hired, specify who will own the project until that time.

NAME Click or tap here to enter text.
 TITLE Click or tap here to enter text.
 EMAIL Click or tap here to enter text.
 PHONE Click or tap here to enter text.

BUSINESS PARTNER COORDINATION

What other agencies or stakeholders would be critical to this project’s success, and what communication have you had with them?

Click or tap here to enter text.

PROJECT TIMELINE

Describe below anticipated implementation milestones by quarter to show how the agency will deliver the intended results. Please identify specific months or dates, if known.

PREPARATION FOR PROJECT LAUNCH (before start of fiscal year)	
FY 2025 Q4	[enter]
FISCAL YEAR STARTS, FUNDS DISBURSED	
FY 2026 Q1	[enter]
FY 2026 Q2	[enter]
FY 2026 Q3	[enter]
FY 2026 Q4	[enter]

Form 2 Detail: FY 2026 Enhancement Request

FY 2026 Agency Budget Request

Complete a separate Form 2 for each enhancement request. Agencies are limited to three Type D & E enhancement requests.

SECTION I. OVERVIEW Required for ALL requests

ENHANCEMENT TITLE* ENHANCEMENT PRIORITY*
EPM Technical Support # OUT OF #

AGENCY* AGENCY CODE*
 Office of the Chief Financial Officer (OCFO) ATO

AGENCY POINT OF CONTACT* POINT OF CONTACT EMAIL*
 James Snight James.snight@dc.gov

REQUEST TYPE*
 Mark the one request type that best describes this enhancement. No type is preferred over any other, but the questions in **Section II: Rationale** differ by type.

A. Restore previous reduction or one-time funding } Complete Sections I-IV. Complete Section V to be considered for evidence rating.
 B. Increased cost to maintain existing activity
 C. Operational improvement with strong business case

 D. Expand high-performing existing activity } Complete Sections I-V.
 E. Completely new activity with highly likely or proven positive outcomes

FUNDING REQUEST*
 Enter amount of Local Funds requested and indicate whether funds are one-time or recurring.

FY 2026 PERSONAL SERVICES (PS)	FY 2026 NON-PERSONAL SERVICES (NPS)	FY 2026 TOTAL REQUEST AMOUNT
\$219,998.00	\$995,963.80	\$1,215,961.80

ONE-TIME PARTIALLY RECURRING RECURRING

FUTURE COSTS*
 If recurring, enter estimated costs over next four years.

TOTAL FY 2027	TOTAL FY 2028	TOTAL FY 2029
\$1,246,360.85	\$1,277,519.87	\$1,209,457.86

ENHANCEMENT SUMMARY*
 In your response:

- State the problem this enhancement is designed to address
- Describe what the enhancement is and/or how it will work
- Describe the impact the enhancement will have on the problem

The budget module in DIFS (aka EPM) is currently funded by the capital project to complete phase two, budget formulation. We anticipate going live in October 2025 at the start of FY26 with budget formulation to cover the FY27 budget formulation cycle. Staff assigned to the DIFS capital project will need to be funded through the operating budget. We are requesting funding for two FTE IT Specialist positions and three contractors starting in FY26 to provide technical support for EPM once it has gone live and the stabilization work has been completed.

AGENCIES: Use this form to provide details about enhancement requests in your agency's FY 2026 budget request.

REQUIRED SECTIONS

- Sections I-IV for ALL requests.
- Section V for Type D/E requests. Types A, B, and C can complete this section to be considered for an evidence rating.
- Section VII for Type F requests.
- Section VI optional for all requests.

You must also submit a completed Form 2 Summary spreadsheet, including spend plan details for each enhancement request.

IMPORTANT: Agencies are limited to three Type D & E enhancement requests for FY 2026. If more than three Type D & E enhancements are submitted, OBPM will only consider and analyze the highest ranked.

RACIAL EQUITY BUDGET TOOL (REBT)
 The Office of Racial Equity (ORE) has developed the Racial Equity Budget Tool (REBT) to guide agencies in assessing how their budgets benefit and/or negatively impact communities based on race, specifically Black,

EDITING RESTRICTIONS: This form uses editing restrictions to ensure consistent displays of information. If needed, the restrictions can be disabled by going to the Review tab at the top of the window, clicking on Protect, then Restrict Editing, and clicking Stop Protection. If prompted for a password, click OK.

Will legislative support be required to implement this enhancement?* YES NO

If yes, please submit a proposed BSA subtitle using Attachment D.

Has this enhancement request been submitted in past formulation cycles?* YES NO

If yes, in which fiscal years was it submitted? Mark all that apply.

FY 2025 FY 2024 FY 2023 FY 2022 FY 2021

SECTION II. RATIONALE *Required for ALL requests*

What problem facing the District will this enhancement address and why does this problem exist?*

Please provide as much detail as possible. Responses that identify and quantify specific problems will receive more favorable consideration.

The completion of the DIFS implementation project at the start of FY26 will require staff to support EPM.

How does this enhancement address this problem and its underlying causes?*

Please provide as much detail as possible. Responses that clearly demonstrate how the proposed enhancement will address the underlying causes will receive more favorable consideration. Please describe any data the agency has collected and/or any analysis the agency has conducted to understand the problem and its potential solutions.

Providing funding for two IT Specialists and three subject matter experts to support the annual budget cycle starting with FY27 will allow the OCFO to provide support to all District agencies during the budget cycle.

Is this enhancement meant to sustain a project initiated with non-local funding (e.g. ARPA, federal grants, SPRs)?

YES NO

If yes, please provide a rationale for why these non-local funds are no longer available:

Click or tap here to enter text.

How can this enhancement be scaled down to be accommodated within a constrained budget?*

Scaling can occur in FY 2026 or the out-years and can be based on fewer residents served, scaled back staffing, adjusted implementation timeline, etc. Please add a new row for each scaled down scenario and rank the scaled down options in order of agency preference.

Use the text box below the table to provide additional detail. If the enhancement cannot be scaled down, please indicate so in the textbox.

RANKING	Describe each proposed approach to scale down the enhancement request and explain the expected impact with each scenario	FY 2026	FY 2027	FY 2028	FY 2029
1	[scenario title]: [description and expected impact]	[enter \$]	[enter \$]	[enter \$]	[enter \$]
2	[scenario title]: [description and expected impact]	[enter \$]	[enter \$]	[enter \$]	[enter \$]

This enhancement request transitions staff from the capital project implementing the budget formulation component of DIFS to operational support. Contract staff that were supporting the interim budget system will no longer be needed and those costs will go away; because they were part of the capital project, the operating budget will not see a cost savings.

SECTION II. RATIONALE (continued) *Required for ALL requests*

QUESTIONS SPECIFIC TO ENHANCEMENT TYPE*

Mark the appropriate enhancement type and use the space below the table to answer the questions for that enhancement type.

IF YOUR ENHANCEMENT TYPE IS...	THEN ANSWER THESE QUESTIONS...
<input type="checkbox"/> A. Restore previous reduction or one-time funding	Why is the restoration of this reduction critical for the District at this time? What negative impact will result if this reduction is not restored? Please cite any relevant agency performance measures or other data that support your response.
<input checked="" type="checkbox"/> B. Increased cost to <u>maintain</u> existing activity	Why are costs increasing to maintain existing levels of service? What are the main cost drivers and what options have the agency already implemented or considered implementing to lower these costs? <i>Changes to the number of people served or the type of services provided should be categorized as a Type D request.</i>
<input type="checkbox"/> C. Operational improvement with a strong business case	How will this enhancement help the District save money in this or future fiscal years? How much will it save?
<input type="checkbox"/> D. Expand high-performing existing activity	Why is this program or activity considered to be high performing? How do the outputs or outcomes compare to those of similar programs within or outside of District government? Please cite any relevant agency performance measures or other data that support your response.
<input type="checkbox"/> E. Completely new activity with highly likely or proven positive outcomes	What will be the District's return on investment, as measured by how many and/or which District residents are served, or some other measure?

Responses to Questions*

The costs for supporting the budget formulation process development were borne by the capital project. Those costs will now need to be covered by the operating budget – which gives the appearance of costs increasing to maintain existing levels of service. In actuality, some of the contracting staff supporting the development will roll off and we'll see a decrease in spending. It just won't be reflecting in a lower operating cost overall.

Form 2 Detail: FY 2026 Enhancement Request
 FY 2026 Agency Budget Request

SECTION III. PERFORMANCE RATIONALE & IMPACT

Required for ALL requests

PERFORMANCE IMPACT

What data will the agency collect to understand the impact of this enhancement?*

Data may include measurements of the demand or need for programs over time, monitoring the quality and/or efficiency of programs, and/or assessing the impact of the enhancement on longer term goals. Please list specific data sources that will be collected and analyzed.

Following implementation of the new budget formulation process, the OCFO will conduct a satisfaction survey to identify which components of the new process met user expectations and where users would like to see improvements.

PERFORMANCE TEAM IS HERE TO HELP!

Need help thinking through this section or identifying data sources or performance measures? Reach out to your OBPM Performance Analyst or to Chief Performance Officer Lia Katz (lia.katz@dc.gov).

What challenges or risks does the agency anticipate related to this enhancement request? What mitigation or management strategies will the agency adopt to address those challenges?

The budget formulation process currently in use by the District is a heavily customized process requiring significant development each year to implement changes in order to capture budget changes and new legislative initiatives and requirements. While those annual changes will still occur, the EPM solution is being configured to improve the annual process. Users will need training materials and frequent communication during the first year (FY26 for the FY27 budget) to assist them in using the new tool. Failure to provide those materials and communication carries a risk that the newness of the system will slow down the annual budget process or cause confusion among users more accustomed to the current IBA system that's being replaced. The staff transitioning from the capital project to the operating budget will have participated in the development of the workflows and processes built into EPM and can provide assistance in guidance during the rollout of the new budgeting system.

Will any performance measures currently in the agency's performance plan be impacted by this enhancement? What new measures will be added to understand the impact of the enhancement?*

- If you are proposing a new metric, write "NEW" in the columns for FY 2024 and FY 2025.
- Identify the "measure type: will the metric measure quantity; quality; efficiency; outcome; context; or is a District wide indicator of environmental trends.
- Please provide the previous year's data and the current year's target for the metric. Please also provide the anticipated targets for next year in the case that (a) the enhancement is funded and (b) the enhancement is not funded.

Form 2 Detail: FY 2026 Enhancement Request
 FY 2026 Agency Budget Request



Performance Measure	New for FY26?	Measure Type	Which direction is desired?	FY 2024 Actual	FY 2025 Target	Anticipated FY 2026 Target	
						With enhancement funding	Without enhancement funding
[enter]	[Select...]	[Select...]	[enter]	[enter]	[enter]	[enter]	[enter]
[enter]	[Select...]	[Select...]	[enter]	[enter]	[enter]	[enter]	[enter]
[enter]	[Select...]	[Select...]	[enter]	[enter]	[enter]	[enter]	[enter]

SECTION IV. BUDGETING FOR RACIAL EQUITY

Required for ALL requests

Is one of the goals of this enhancement to reduce or eliminate a racial equity gap?*

 YES NO

Which of the four goals in the District's [Racial Equity Action Plan](#) (REAP) or your agency specific REAP does this enhancement request advance? Check all that apply.

- 1. Improving DC Government staff understanding and commitment to achieving racial equity (e.g., training, capacity building, or use of racial equity tools)
- 2. Reducing or eliminating a known racial and ethnic inequity (domains include housing, health, economic opportunity, safety, education, neighborhood life, and civic engagement)
- 3. Enhancing opportunities to meaningfully engage DC residents in decision-making processes and strengthening partnerships
- 4. Improving DC government ability to be an equitable employer and engage in racially equitable hiring, promotion, and retention practices (e.g., building pipelines with HBCU/HSI, staff development funds, or community of practice on hiring)

What racial inequity or REAP sub-goal(s) does this enhancement request address?*

For example, health disparity, educational gap, disproportionality in housing, bolstering existing community resources, etc. Please be as specific as possible. For REAP goals, please list the specific action (e.g. 1B, see District's REAP for supporting actions).

[Click or tap here to enter text.](#)

What is the rationale for addressing the inequity in this way and/or with this program?*

For example, is the enhancement in response to a legislative requirement or mandate, community engagement efforts, demographic data, or something else?

[Click or tap here to enter text.](#)

In what ways have you meaningfully involved internal and external stakeholders in the development of your agency's budget request, including staff and communities of color? See ORE's [Meaningful Community Engagement Guide](#).

[Click or tap here to enter text.](#)

If this budget enhancement could potentially cause unintended benefits or burdens, please detail what racial or ethnic groups might be positively or negatively impacted.* For example, the location for a new airport could disrupt traffic patterns and create noise and air pollution that impact residents in the immediate vicinity, which could worsen racial health inequities.

[Click or tap here to enter text.](#)

SECTION V. EVIDENCE-BASED BUDGETING*Required for Type D & E requests. Optional for Types A, B & C.*

This section is required for all Type D and E enhancement requests that would expand existing activities or launch completely new activities. This section may be completed for Type A, B and C enhancement requests to be considered for an evidence rating.

If the activities described in this enhancement are successfully implemented, what outcome(s) will improve?* OBPM expects that it will be possible for agencies to identify for almost all enhancement requests a new performance measure (Section III of this form) that aligns with the outcome measures identified in the evidence provided. If this is not feasible, please explain below.

Click or tap here to enter text.

What evidence supports the likelihood that this enhancement will achieve the desired outcome?*

Please describe the quantitative studies or other measures that show the outcomes of similar efforts previously undertaken in the District or in other cities (see sidebar for what OBPM will look for to review enhancements as evidence-based or supported by preliminary evidence). Provide links to cite your sources, which may include formal evaluation studies, evidence standards, or evidence clearinghouses.

Click or tap here to enter text.

Which parts of your enhancement are identical to the model(s) the evidence comes from?*

As applicable, your answer should describe sameness in the target population, intervention, and availability of inputs/resources needed, etc.

Click or tap here to enter text.

Which parts of your enhancement are different from the model(s) evaluated in the studies linked?*

Explain why deviations are necessary for success in DC.

Click or tap here to enter text.

Are you building or planning to build evidence to support this enhancement using a formal program evaluation?*

YES NO

If yes, please describe or link below to the planned evaluation design, research question(s), and timeline for results.

Click or tap here to enter text.

THE LAB@DC TEAM IS HERE TO HELP!

Have questions about the evidence? Email the.lab@dc.gov (and CC your OBPM Budget Analyst). The Lab can pre-review evidence, brainstorm future evaluation ideas, offer suggestions on where to look for evidence, and help you think through the evidence you've found.

HELPFUL TIPS TO GET STARTED:

In general, evidence ratings follow the principles listed below; the quality of the evidence provided and how well it matches the enhancement may also affect the final evidence rating:

- Experimental studies (also called randomized evaluations or randomized control trials) that show that a program or intervention *caused* an outcome may receive a **STRONG/4-star** evidence rating
- Quasi-experimental studies that suggest that a program or intervention *caused* an outcome by comparing outcomes between the group receiving the enhancement and a very similar group that doesn't receive the enhancement may receive a **MODERATE/3-star** evidence rating
- Correlational studies with appropriate statistical controls may receive a **PROMISING/2-star** evidence rating
- Before-and-after comparison studies (also called pre-post comparison studies) may receive a **SOME/1-star** evidence rating

Consider the positive impact(s) this enhancement should have on District residents or government operations. These are the outcome(s) of the enhancement. Try searching [Google Scholar](#) or a similar database for relevant existing research. Government evidence clearinghouses (like [What Works Clearinghouse](#) for education and [CrimeSolutions](#) for public safety) are also good places to search according to specialized topics.

SECTION VI. PROJECT PLAN *Optional for All Requests*

This section is optional. However, it is recommended for Type D and E enhancement requests that would expand existing activities or launch completely new activities.

This project plan can be used to show how the agency will deliver the intended results before the end of the fiscal year. Complete as best you can, knowing the plan might evolve.

PROJECT OWNER

Who is the single person who will be most responsible for this initiative? If the project owner must be hired, specify who will own the project until that time.

NAME Click or tap here to enter text.
 TITLE Click or tap here to enter text.
 EMAIL Click or tap here to enter text.
 PHONE Click or tap here to enter text.

BUSINESS PARTNER COORDINATION

What other agencies or stakeholders would be critical to this project’s success, and what communication have you had with them?

Click or tap here to enter text.

PROJECT TIMELINE

Describe below anticipated implementation milestones by quarter to show how the agency will deliver the intended results. Please identify specific months or dates, if known.

PREPARATION FOR PROJECT LAUNCH (before start of fiscal year)	
FY 2025 Q4	[enter]
FISCAL YEAR STARTS, FUNDS DISBURSED	
FY 2026 Q1	[enter]
FY 2026 Q2	[enter]
FY 2026 Q3	[enter]
FY 2026 Q4	[enter]

Form 2 Detail: FY 2026 Enhancement Request

FY 2026 Agency Budget Request



Complete a separate Form 2 for each enhancement request. Agencies are limited to three Type D & E enhancement requests.

SECTION I. OVERVIEW Required for ALL requests

ENHANCEMENT TITLE* SmartNet Support	ENHANCEMENT PRIORITY* # OUT OF #
AGENCY* Office of the Chief Financial Officer (OCFO)	AGENCY CODE* ATO
AGENCY POINT OF CONTACT* James Snight	POINT OF CONTACT EMAIL* James.snight@dc.gov

REQUEST TYPE*
Mark the one request type that best describes this enhancement. No type is preferred over any other, but the questions in **Section II: Rationale** differ by type.

<input type="checkbox"/> A. Restore previous reduction or one-time funding	}	Complete Sections I-IV. Complete Section V to be considered for evidence rating.
<input checked="" type="checkbox"/> B. Increased cost to maintain existing activity		
<input type="checkbox"/> C. Operational improvement with strong business case		
<input type="checkbox"/> D. Expand high-performing existing activity	}	Complete Sections I-V.
<input type="checkbox"/> E. Completely new activity with highly likely or proven positive outcomes		

FUNDING REQUEST*
Enter amount of Local Funds requested and indicate whether funds are one-time or recurring.

FY 2026 PERSONAL SERVICES (PS)	FY 2026 NON-PERSONAL SERVICES (NPS)	FY 2026 TOTAL REQUEST AMOUNT
\$0.00	\$63,722.00	\$63,722.00

ONE-TIME
 PARTIALLY RECURRING
 RECURRING

FUTURE COSTS*
If recurring, enter estimated costs over next four years.

TOTAL FY 2027	TOTAL FY 2028	TOTAL FY 2029
\$63,722.00	\$63,722.00	\$63,722.00

ENHANCEMENT SUMMARY*
In your response:

- State the problem this enhancement is designed to address
- Describe what the enhancement is and/or how it will work
- Describe the impact the enhancement will have on the problem

The OCFO has been replacing aging technology – switches and the internal firewall, in particular. While the purchase of the replacement hardware and software was part of our IT Upgrades project, licensing and support costs shift to the operating budget in FY26 requiring this additional funding to handle the operating impact of the capital purchases. The difference between the new maintenance cost of \$197,219 and the cost for maintaining the equipment being replaced is \$63,722.00.

AGENCIES: Use this form to provide details about enhancement requests in your agency's FY 2026 budget request.

REQUIRED SECTIONS

- Sections I-IV for ALL requests.
- Section V for Type D/E requests. Types A, B, and C can complete this section to be considered for an evidence rating.
- Section VII for Type F requests.
- Section VI optional for all requests.

You must also submit a completed Form 2 Summary spreadsheet, including spend plan details for each enhancement request.

IMPORTANT: Agencies are limited to **three Type D & E enhancement requests for FY 2026**. If more than three Type D & E enhancements are submitted, OBPM will only consider and analyze the highest ranked.

RACIAL EQUITY BUDGET TOOL (REBT)
The Office of Racial Equity (ORE) has developed the Racial Equity Budget Tool (REBT) to guide agencies in assessing how their budgets benefit and/or negatively impact communities based on race, specifically Black,

EDITING RESTRICTIONS: This form uses editing restrictions to ensure consistent displays of information. If needed, the restrictions can be disabled by going to the Review tab at the top of the window, clicking on Protect, then Restrict Editing, and clicking Stop Protection. If prompted for a password, click OK.

Will legislative support be required to implement this enhancement?* YES NO

If yes, please submit a proposed BSA subtitle using Attachment D.

Has this enhancement request been submitted in past formulation cycles?* YES NO

If yes, in which fiscal years was it submitted? Mark all that apply.

FY 2025
 FY 2024
 FY 2023
 FY 2022
 FY 2021

SECTION II. RATIONALE *Required for ALL requests*

What problem facing the District will this enhancement address and why does this problem exist?*

Please provide as much detail as possible. Responses that identify and quantify specific problems will receive more favorable consideration.

Aging hardware and software need to be replaced and then funding is needed for maintaining licensing and support of the switches and firewall.

How does this enhancement address this problem and its underlying causes?*

Please provide as much detail as possible. Responses that clearly demonstrate how the proposed enhancement will address the underlying causes will receive more favorable consideration. Please describe any data the agency has collected and/or any analysis the agency has conducted to understand the problem and its potential solutions.

The replacement of the existing hardware and software has been funded through the IT Upgrades project. We now need to maintain the hardware and software; this enhancement request provides that funding.

Is this enhancement meant to sustain a project initiated with non-local funding (e.g. ARPA, federal grants, SPRs)?

YES NO

If yes, please provide a rationale for why these non-local funds are no longer available:

Click or tap here to enter text.

How can this enhancement be scaled down to be accommodated within a constrained budget?*

Scaling can occur in FY 2026 or the out-years and can be based on fewer residents served, scaled back staffing, adjusted implementation timeline, etc. Please add a new row for each scaled down scenario and rank the scaled down options in order of agency preference.

Use the text box below the table to provide additional detail. If the enhancement cannot be scaled down, please indicate so in the textbox.

RANKING	Describe each proposed approach to scale down the enhancement request and explain the expected impact with each scenario	FY 2026	FY 2027	FY 2028	FY 2029
1	[scenario title]: [description and expected impact]	[enter \$]	[enter \$]	[enter \$]	[enter \$]
2	[scenario title]: [description and expected impact]	[enter \$]	[enter \$]	[enter \$]	[enter \$]

The contract for this equipment and software is being consolidated with another contract. There could be some savings from the consolidation but we do not have anything definite at this time.

SECTION II. RATIONALE (continued)

Required for ALL requests

QUESTIONS SPECIFIC TO ENHANCEMENT TYPE*

Mark the appropriate enhancement type and use the space below the table to answer the questions for that enhancement type.

IF YOUR ENHANCEMENT TYPE IS...	THEN ANSWER THESE QUESTIONS...
<input type="checkbox"/> A. Restore previous reduction or one-time funding	Why is the restoration of this reduction critical for the District at this time? What negative impact will result if this reduction is not restored? Please cite any relevant agency performance measures or other data that support your response.
<input checked="" type="checkbox"/> B. Increased cost to <u>maintain</u> existing activity	Why are costs increasing to maintain existing levels of service? What are the main cost drivers and what options have the agency already implemented or considered implementing to lower these costs? <i>Changes to the number of people served or the type of services provided should be categorized as a Type D request.</i>
<input type="checkbox"/> C. Operational improvement with a strong business case	How will this enhancement help the District save money in this or future fiscal years? How much will it save?
<input type="checkbox"/> D. Expand high-performing existing activity	Why is this program or activity considered to be high performing? How do the outputs or outcomes compare to those of similar programs within or outside of District government? Please cite any relevant agency performance measures or other data that support your response.
<input type="checkbox"/> E. Completely new activity with highly likely or proven positive outcomes	What will be the District's return on investment, as measured by how many and/or which District residents are served, or some other measure?

Responses to Questions*

The new equipment and software have higher maintenance costs. The enhancement request covers the difference between what we are already paying and the new maintenance costs.

SECTION III. PERFORMANCE RATIONALE & IMPACT

Required for ALL requests

PERFORMANCE IMPACT

What data will the agency collect to understand the impact of this enhancement?*

Data may include measurements of the demand or need for programs over time, monitoring the quality and/or efficiency of programs, and/or assessing the impact of the enhancement on longer term goals. Please list specific data sources that will be collected and analyzed.

The network team will be analyzing the performance of the new hardware and software to identify performance improvements.

PERFORMANCE TEAM IS HERE TO HELP!

Need help thinking through this section or identifying data sources or performance measures? Reach out to your OBPM Performance Analyst or to Chief Performance Officer Lia Katz (lia.katz@dc.gov).

What challenges or risks does the agency anticipate related to this enhancement request? What mitigation or management strategies will the agency adopt to address those challenges?

Normally newer hardware and software are more reliable and faster than the equipment it replaces – but there is a break-in and adjustment period needed to fine-tune the tools to deliver peak performance. Failure to optimize properly could result in network issues if not remediated.

Will any performance measures currently in the agency's performance plan be impacted by this enhancement? What new measures will be added to understand the impact of the enhancement?*

- If you are proposing a new metric, write “NEW” in the columns for FY 2024 and FY 2025.
- Identify the “measure type: will the metric measure quantity; quality; efficiency; outcome; context; or is a District wide indicator of environmental trends.
- Please provide the previous year’s data and the current year’s target for the metric. Please also provide the anticipated targets for next year in the case that (a) the enhancement is funded and (b) the enhancement is not funded.

Form 2 Detail: FY 2026 Enhancement Request
 FY 2026 Agency Budget Request



Performance Measure	New for FY26?	Measure Type	Which direction is desired?	FY 2024 Actual	FY 2025 Target	Anticipated FY 2026 Target	
						With enhancement funding	Without enhancement funding
[enter]	[Select...]	[Select...]	[enter]	[enter]	[enter]	[enter]	[enter]
[enter]	[Select...]	[Select...]	[enter]	[enter]	[enter]	[enter]	[enter]
[enter]	[Select...]	[Select...]	[enter]	[enter]	[enter]	[enter]	[enter]

SECTION IV. BUDGETING FOR RACIAL EQUITY

Required for ALL requests

Is one of the goals of this enhancement to reduce or eliminate a racial equity gap?*

 YES NO

Which of the four goals in the District's [Racial Equity Action Plan](#) (REAP) or your agency specific REAP does this enhancement request advance?*. Check all that apply.

- 1. Improving DC Government staff understanding and commitment to achieving racial equity (e.g., training, capacity building, or use of racial equity tools)
- 2. Reducing or eliminating a known racial and ethnic inequity (domains include housing, health, economic opportunity, safety, education, neighborhood life, and civic engagement)
- 3. Enhancing opportunities to meaningfully engage DC residents in decision-making processes and strengthening partnerships
- 4. Improving DC government ability to be an equitable employer and engage in racially equitable hiring, promotion, and retention practices (e.g., building pipelines with HBCU/HSI, staff development funds, or community of practice on hiring)

What racial inequity or REAP sub-goal(s) does this enhancement request address?*

For example, health disparity, educational gap, disproportionality in housing, bolstering existing community resources, etc. Please be as specific as possible. For REAP goals, please list the specific action (e.g. 1B, see District's REAP for supporting actions).

[Click or tap here to enter text.](#)

What is the rationale for addressing the inequity in this way and/or with this program?*

For example, is the enhancement in response to a legislative requirement or mandate, community engagement efforts, demographic data, or something else?

[Click or tap here to enter text.](#)

In what ways have you meaningfully involved internal and external stakeholders in the development of your agency's budget request, including staff and communities of color?*. See ORE's [Meaningful Community Engagement Guide](#).

[Click or tap here to enter text.](#)

If this budget enhancement could potentially cause unintended benefits or burdens, please detail what racial or ethnic groups might be positively or negatively impacted.* For example, the location for a new airport could disrupt traffic patterns and create noise and air pollution that impact residents in the immediate vicinity, which could worsen racial health inequities.

[Click or tap here to enter text.](#)

SECTION V. EVIDENCE-BASED BUDGETING

Required for Type D & E requests. Optional for Types A, B & C.

This section is required for all Type D and E enhancement requests that would expand existing activities or launch completely new activities. This section may be completed for Type A, B and C enhancement requests to be considered for an evidence rating.

If the activities described in this enhancement are successfully implemented, what outcome(s) will improve?* OBPM expects that it will be possible for agencies to identify for almost all enhancement requests a new performance measure (Section III of this form) that aligns with the outcome measures identified in the evidence provided. If this is not feasible, please explain below.

Click or tap here to enter text.

What evidence supports the likelihood that this enhancement will achieve the desired outcome?*

Please describe the quantitative studies or other measures that show the outcomes of similar efforts previously undertaken in the District or in other cities (see sidebar for what OBPM will look for to review enhancements as evidence-based or supported by preliminary evidence). Provide links to cite your sources, which may include formal evaluation studies, evidence standards, or evidence clearinghouses.

Click or tap here to enter text.

Which parts of your enhancement are identical to the model(s) the evidence comes from?*

As applicable, your answer should describe sameness in the target population, intervention, and availability of inputs/resources needed, etc.

Click or tap here to enter text.

Which parts of your enhancement are different from the model(s) evaluated in the studies linked?*

Explain why deviations are necessary for success in DC.

Click or tap here to enter text.

Are you building or planning to build evidence to support this enhancement using a formal program evaluation?*

YES NO

If yes, please describe or link below to the planned evaluation design, research question(s), and timeline for results.

Click or tap here to enter text.

THE LAB@DC TEAM IS HERE TO HELP!

Have questions about the evidence? Email the.lab@dc.gov (and CC your OBPM Budget Analyst). The Lab can pre-review evidence, brainstorm future evaluation ideas, offer suggestions on where to look for evidence, and help you think through the evidence you've found.

HELPFUL TIPS TO GET STARTED:

In general, evidence ratings follow the principles listed below; the quality of the evidence provided and how well it matches the enhancement may also affect the final evidence rating:

- Experimental studies (also called randomized evaluations or randomized control trials) that show that a program or intervention *caused* an outcome may receive a **STRONG/4-star** evidence rating
- Quasi-experimental studies that suggest that a program or intervention *caused* an outcome by comparing outcomes between the group receiving the enhancement and a very similar group that doesn't receive the enhancement may receive a **MODERATE/3-star** evidence rating
- Correlational studies with appropriate statistical controls may receive a **PROMISING/2-star** evidence rating
- Before-and-after comparison studies (also called pre-post comparison studies) may receive a **SOME/1-star** evidence rating

Consider the positive impact(s) this enhancement should have on District residents or government operations. These are the outcome(s) of the enhancement. Try searching [Google Scholar](#) or a similar database for relevant existing research. Government evidence clearinghouses (like [What Works Clearinghouse](#) for education and [CrimeSolutions](#) for public safety) are also good places to search according to specialized topics.

SECTION VI. PROJECT PLAN *Optional for All Requests*

This section is optional. However, it is recommended for Type D and E enhancement requests that would expand existing activities or launch completely new activities.

This project plan can be used to show how the agency will deliver the intended results before the end of the fiscal year. Complete as best you can, knowing the plan might evolve.

PROJECT OWNER

Who is the single person who will be most responsible for this initiative? If the project owner must be hired, specify who will own the project until that time.

NAME Click or tap here to enter text.
 TITLE Click or tap here to enter text.
 EMAIL Click or tap here to enter text.
 PHONE Click or tap here to enter text.

BUSINESS PARTNER COORDINATION

What other agencies or stakeholders would be critical to this project’s success, and what communication have you had with them?

Click or tap here to enter text.

PROJECT TIMELINE

Describe below anticipated implementation milestones by quarter to show how the agency will deliver the intended results. Please identify specific months or dates, if known.

PREPARATION FOR PROJECT LAUNCH (before start of fiscal year)	
FY 2025 Q4	[enter]
FISCAL YEAR STARTS, FUNDS DISBURSED	
FY 2026 Q1	[enter]
FY 2026 Q2	[enter]
FY 2026 Q3	[enter]
FY 2026 Q4	[enter]

Form 2 Detail: FY 2026 Enhancement Request

FY 2026 Agency Budget Request

Complete a separate Form 2 for each enhancement request. Agencies are limited to three Type D & E enhancement requests.

SECTION I. OVERVIEW Required for ALL requests

ENHANCEMENT TITLE* IT UPGRADES: SmartNet	ENHANCEMENT PRIORITY* # OUT OF #
AGENCY* Office of the Chief Financial Officer (OCFO)	AGENCY CODE* ATO
AGENCY POINT OF CONTACT* James Snight	POINT OF CONTACT EMAIL* James.snight@dc.gov

REQUEST TYPE*
 Mark the one request type that best describes this enhancement. No type is preferred over any other, but the questions in **Section II: Rationale** differ by type.

<input type="checkbox"/> A. Restore previous reduction or one-time funding	}	Complete Sections I-IV. Complete Section V to be considered for evidence rating.
<input checked="" type="checkbox"/> B. Increased cost to maintain existing activity		
<input type="checkbox"/> C. Operational improvement with strong business case		
<input type="checkbox"/> D. Expand high-performing existing activity	}	Complete Sections I-V.
<input type="checkbox"/> E. Completely new activity with highly likely or proven positive outcomes		

FUNDING REQUEST*
 Enter amount of Local Funds requested and indicate whether funds are one-time or recurring.

FY 2026 PERSONAL SERVICES (PS)	FY 2026 NON-PERSONAL SERVICES (NPS)	FY 2026 TOTAL REQUEST AMOUNT
\$0.00	\$300,000.00	\$300,000.00

ONE-TIME
 PARTIALLY RECURRING
 RECURRING

FUTURE COSTS*
 If recurring, enter estimated costs over next four years.

TOTAL FY 2027	TOTAL FY 2028	TOTAL FY 2029
[enter amount]	[enter amount]	[enter amount]

ENHANCEMENT SUMMARY*
 In your response:

- State the problem this enhancement is designed to address
- Describe what the enhancement is and/or how it will work
- Describe the impact the enhancement will have on the problem

Completion of SmartNet project to replace end-of-life hardware infrastructure and redesign existing network edge routing between OCFO and OCTO to provide proper redundancy and high availability in case of site failure.

AGENCIES: Use this form to provide details about enhancement requests in your agency's FY 2026 budget request.

REQUIRED SECTIONS

- Sections I-IV for ALL requests.
- Section V for Type D/E requests. Types A, B, and C can complete this section to be considered for an evidence rating.
- Section VII for Type F requests.
- Section VI optional for all requests.

You must also submit a completed Form 2 Summary spreadsheet, including spend plan details for each enhancement request.

IMPORTANT: Agencies are limited to three Type D & E enhancement requests for FY 2026. If more than three Type D & E enhancements are submitted, OBPM will only consider and analyze the highest ranked.

RACIAL EQUITY BUDGET TOOL (REBT)
 The Office of Racial Equity (ORE) has developed the Racial Equity Budget Tool (REBT) to guide agencies in assessing how their budgets benefit and/or negatively impact communities based on race, specifically Black,

EDITING RESTRICTIONS: This form uses editing restrictions to ensure consistent displays of information. If needed, the restrictions can be disabled by going to the Review tab at the top of the window, clicking on Protect, then Restrict Editing, and clicking Stop Protection. If prompted for a password, click OK.

Will legislative support be required to implement this enhancement?* YES NO

If yes, please submit a proposed BSA subtitle using Attachment D.

Has this enhancement request been submitted in past formulation cycles?* YES NO

If yes, in which fiscal years was it submitted? Mark all that apply.

FY 2025
 FY 2024
 FY 2023
 FY 2022
 FY 2021

SECTION II. RATIONALE *Required for ALL requests*

What problem facing the District will this enhancement address and why does this problem exist?*

Please provide as much detail as possible. Responses that identify and quantify specific problems will receive more favorable consideration.

Current infrastructure needs to be upgraded to provide reliable platform used by the OCFO. This funding will allow us to complete the replacing of aging/end-of-life hardware and to redesign the routing between OCFO and OCTO.

How does this enhancement address this problem and its underlying causes?*

Please provide as much detail as possible. Responses that clearly demonstrate how the proposed enhancement will address the underlying causes will receive more favorable consideration. Please describe any data the agency has collected and/or any analysis the agency has conducted to understand the problem and its potential solutions.

New hardware and its configuration will provide proper redundancy and high availability in case of a site failure.

Is this enhancement meant to sustain a project initiated with non-local funding (e.g. ARPA, federal grants, SPRs)?

If yes, please provide a rationale for why these non-local funds are no longer available:

YES NO

Click or tap here to enter text.

How can this enhancement be scaled down to be accommodated within a constrained budget?*

Scaling can occur in FY 2026 or the out-years and can be based on fewer residents served, scaled back staffing, adjusted implementation timeline, etc. Please add a new row for each scaled down scenario and rank the scaled down options in order of agency preference.

Use the text box below the table to provide additional detail. If the enhancement cannot be scaled down, please indicate so in the textbox.

RANKING	Describe each proposed approach to scale down the enhancement request and explain the expected impact with each scenario	FY 2026	FY 2027	FY 2028	FY 2029
1	[scenario title]: [description and expected impact]	[enter \$]	[enter \$]	[enter \$]	[enter \$]
2	[scenario title]: [description and expected impact]	[enter \$]	[enter \$]	[enter \$]	[enter \$]

One time replacement of hardware will mean future costs will be for operating support only, once equipment is in place.

SECTION II. RATIONALE (continued) *Required for ALL requests*

QUESTIONS SPECIFIC TO ENHANCEMENT TYPE*

Mark the appropriate enhancement type and use the space below the table to answer the questions for that enhancement type.

IF YOUR ENHANCEMENT TYPE IS...	THEN ANSWER THESE QUESTIONS...
<input type="checkbox"/> A. Restore previous reduction or one-time funding	Why is the restoration of this reduction critical for the District at this time? What negative impact will result if this reduction is not restored? Please cite any relevant agency performance measures or other data that support your response.
<input checked="" type="checkbox"/> B. Increased cost to <u>maintain</u> existing activity	Why are costs increasing to maintain existing levels of service? What are the main cost drivers and what options have the agency already implemented or considered implementing to lower these costs? <i>Changes to the number of people served or the type of services provided should be categorized as a Type D request.</i>
<input type="checkbox"/> C. Operational improvement with a strong business case	How will this enhancement help the District save money in this or future fiscal years? How much will it save?
<input type="checkbox"/> D. Expand high-performing existing activity	Why is this program or activity considered to be high performing? How do the outputs or outcomes compare to those of similar programs within or outside of District government? Please cite any relevant agency performance measures or other data that support your response.
<input type="checkbox"/> E. Completely new activity with highly likely or proven positive outcomes	What will be the District's return on investment, as measured by how many and/or which District residents are served, or some other measure?

Responses to Questions*

Costs are increasing to complete the purchase of hardware needed to replace aging equipment while providing stability to the OCFO's internal network, providing needed redundancy and ensuring high availability in case of a site failure.

Form 2 Detail: FY 2026 Enhancement Request

FY 2026 Agency Budget Request

SECTION III. PERFORMANCE RATIONALE & IMPACT
Required for ALL requests
PERFORMANCE IMPACT
What data will the agency collect to understand the impact of this enhancement?*

Data may include measurements of the demand or need for programs over time, monitoring the quality and/or efficiency of programs, and/or assessing the impact of the enhancement on longer term goals. Please list specific data sources that will be collected and analyzed.

Infrastructure Services Group will monitor network equipment to confirm correct configuration with OCTO on firewall settings and the OCFO switches supporting the network.

PERFORMANCE TEAM IS HERE TO HELP!

Need help thinking through this section or identifying data sources or performance measures? Reach out to your OBPM Performance Analyst or to Chief Performance Officer Lia Katz (lia.katz@dc.gov).

What challenges or risks does the agency anticipate related to this enhancement request? What mitigation or management strategies will the agency adopt to address those challenges?

Upgrade of the network began in FY25. This funding will ensure completion of the equipment upgrades providing a more stable, more secure network infrastructure.

Will any performance measures currently in the agency's performance plan be impacted by this enhancement? What new measures will be added to understand the impact of the enhancement?*

- If you are proposing a new metric, write "NEW" in the columns for FY 2024 and FY 2025.
- Identify the "measure type: will the metric measure quantity; quality; efficiency; outcome; context; or is a District wide indicator of environmental trends.
- Please provide the previous year's data and the current year's target for the metric. Please also provide the anticipated targets for next year in the case that (a) the enhancement is funded and (b) the enhancement is not funded.

Form 2 Detail: FY 2026 Enhancement Request
 FY 2026 Agency Budget Request



Performance Measure	New for FY26?	Measure Type	Which direction is desired?	FY 2024 Actual	FY 2025 Target	Anticipated FY 2026 Target	
						With enhancement funding	Without enhancement funding
[enter]	[Select...]	[Select...]	[enter]	[enter]	[enter]	[enter]	[enter]
[enter]	[Select...]	[Select...]	[enter]	[enter]	[enter]	[enter]	[enter]
[enter]	[Select...]	[Select...]	[enter]	[enter]	[enter]	[enter]	[enter]

SECTION IV. BUDGETING FOR RACIAL EQUITY

Required for ALL requests

Is one of the goals of this enhancement to reduce or eliminate a racial equity gap?*

 YES NO

Which of the four goals in the District's [Racial Equity Action Plan](#) (REAP) or your agency specific REAP does this enhancement request advance?*. Check all that apply.

- 1. Improving DC Government staff understanding and commitment to achieving racial equity (e.g., training, capacity building, or use of racial equity tools)
- 2. Reducing or eliminating a known racial and ethnic inequity (domains include housing, health, economic opportunity, safety, education, neighborhood life, and civic engagement)
- 3. Enhancing opportunities to meaningfully engage DC residents in decision-making processes and strengthening partnerships
- 4. Improving DC government ability to be an equitable employer and engage in racially equitable hiring, promotion, and retention practices (e.g., building pipelines with HBCU/HSI, staff development funds, or community of practice on hiring)

What racial inequity or REAP sub-goal(s) does this enhancement request address?*

For example, health disparity, educational gap, disproportionality in housing, bolstering existing community resources, etc. Please be as specific as possible. For REAP goals, please list the specific action (e.g. 1B, see District's REAP for supporting actions).

[Click or tap here to enter text.](#)

What is the rationale for addressing the inequity in this way and/or with this program?*

For example, is the enhancement in response to a legislative requirement or mandate, community engagement efforts, demographic data, or something else?

[Click or tap here to enter text.](#)

In what ways have you meaningfully involved internal and external stakeholders in the development of your agency's budget request, including staff and communities of color?*. See ORE's [Meaningful Community Engagement Guide](#).

[Click or tap here to enter text.](#)

If this budget enhancement could potentially cause unintended benefits or burdens, please detail what racial or ethnic groups might be positively or negatively impacted.* For example, the location for a new airport could disrupt traffic patterns and create noise and air pollution that impact residents in the immediate vicinity, which could worsen racial health inequities.

[Click or tap here to enter text.](#)

SECTION V. EVIDENCE-BASED BUDGETING

Required for Type D & E requests. Optional for Types A, B & C.

This section is required for all Type D and E enhancement requests that would expand existing activities or launch completely new activities. This section may be completed for Type A, B and C enhancement requests to be considered for an evidence rating.

If the activities described in this enhancement are successfully implemented, what outcome(s) will improve?* OBPM expects that it will be possible for agencies to identify for almost all enhancement requests a new performance measure (Section III of this form) that aligns with the outcome measures identified in the evidence provided. If this is not feasible, please explain below.

Click or tap here to enter text.

What evidence supports the likelihood that this enhancement will achieve the desired outcome?*

Please describe the quantitative studies or other measures that show the outcomes of similar efforts previously undertaken in the District or in other cities (see sidebar for what OBPM will look for to review enhancements as evidence-based or supported by preliminary evidence). Provide links to cite your sources, which may include formal evaluation studies, evidence standards, or evidence clearinghouses.

Click or tap here to enter text.

Which parts of your enhancement are identical to the model(s) the evidence comes from?*

As applicable, your answer should describe sameness in the target population, intervention, and availability of inputs/resources needed, etc.

Click or tap here to enter text.

Which parts of your enhancement are different from the model(s) evaluated in the studies linked?*

Explain why deviations are necessary for success in DC.

Click or tap here to enter text.

Are you building or planning to build evidence to support this enhancement using a formal program evaluation?*

YES NO

If yes, please describe or link below to the planned evaluation design, research question(s), and timeline for results.

Click or tap here to enter text.

THE LAB@DC TEAM IS HERE TO HELP!

Have questions about the evidence? Email the.lab@dc.gov (and CC your OBPM Budget Analyst). The Lab can pre-review evidence, brainstorm future evaluation ideas, offer suggestions on where to look for evidence, and help you think through the evidence you've found.

HELPFUL TIPS TO GET STARTED:

In general, evidence ratings follow the principles listed below; the quality of the evidence provided and how well it matches the enhancement may also affect the final evidence rating:

- Experimental studies (also called randomized evaluations or randomized control trials) that show that a program or intervention *caused* an outcome may receive a **STRONG/4-star** evidence rating
- Quasi-experimental studies that suggest that a program or intervention *caused* an outcome by comparing outcomes between the group receiving the enhancement and a very similar group that doesn't receive the enhancement may receive a **MODERATE/3-star** evidence rating
- Correlational studies with appropriate statistical controls may receive a **PROMISING/2-star** evidence rating
- Before-and-after comparison studies (also called pre-post comparison studies) may receive a **SOME/1-star** evidence rating

Consider the positive impact(s) this enhancement should have on District residents or government operations. These are the outcome(s) of the enhancement. Try searching [Google Scholar](#) or a similar database for relevant existing research. Government evidence clearinghouses (like [What Works Clearinghouse](#) for education and [CrimeSolutions](#) for public safety) are also good places to search according to specialized topics.

SECTION VI. PROJECT PLAN *Optional for All Requests*

This section is optional. However, it is recommended for Type D and E enhancement requests that would expand existing activities or launch completely new activities.

This project plan can be used to show how the agency will deliver the intended results before the end of the fiscal year. Complete as best you can, knowing the plan might evolve.

PROJECT OWNER

Who is the single person who will be most responsible for this initiative? If the project owner must be hired, specify who will own the project until that time.

NAME Click or tap here to enter text.
 TITLE Click or tap here to enter text.
 EMAIL Click or tap here to enter text.
 PHONE Click or tap here to enter text.

BUSINESS PARTNER COORDINATION

What other agencies or stakeholders would be critical to this project’s success, and what communication have you had with them?

Click or tap here to enter text.

PROJECT TIMELINE

Describe below anticipated implementation milestones by quarter to show how the agency will deliver the intended results. Please identify specific months or dates, if known.

PREPARATION FOR PROJECT LAUNCH (before start of fiscal year)	
FY 2025 Q4	[enter]
FISCAL YEAR STARTS, FUNDS DISBURSED	
FY 2026 Q1	[enter]
FY 2026 Q2	[enter]
FY 2026 Q3	[enter]
FY 2026 Q4	[enter]

Form 2 Detail: FY 2026 Enhancement Request

FY 2026 Agency Budget Request



Complete a separate Form 2 for each enhancement request. Agencies are limited to three Type D & E enhancement requests.

SECTION I. OVERVIEW Required for ALL requests

ENHANCEMENT TITLE* **IT Upgrades: Security Improvements** ENHANCEMENT PRIORITY* **#** OUT OF **#**

AGENCY* **Office of the Chief Financial Officer (OCFO)** AGENCY CODE* **ATO**

AGENCY POINT OF CONTACT* **James Snight** POINT OF CONTACT EMAIL* **James.snight@dc.gov**

REQUEST TYPE*
Mark the one request type that best describes this enhancement. No type is preferred over any other, but the questions in **Section II: Rationale** differ by type.

A. Restore previous reduction or one-time funding } Complete Sections I-IV. Complete Section V to be considered for evidence rating.

B. Increased cost to maintain existing activity

C. Operational improvement with strong business case

D. Expand high-performing existing activity } Complete Sections I-V.

E. Completely new activity with highly likely or proven positive outcomes

FUNDING REQUEST*
Enter amount of Local Funds requested and indicate whether funds are one-time or recurring.

FY 2026 PERSONAL SERVICES (PS)	FY 2026 NON-PERSONAL SERVICES (NPS)	FY 2026 TOTAL REQUEST AMOUNT
\$0.00	\$1,672,500.00	\$1,672,500.00

ONE-TIME PARTIALLY RECURRING RECURRING

FUTURE COSTS*
If recurring, enter estimated costs over next four years.

TOTAL FY 2027	TOTAL FY 2028	TOTAL FY 2029
\$1,460,025.00	\$1,503,825.75	\$1,548,940.52

ENHANCEMENT SUMMARY*
In your response:

- State the problem this enhancement is designed to address
- Describe what the enhancement is and/or how it will work
- Describe the impact the enhancement will have on the problem

Adopt a robust Security Services Platform, to include Managed Detection and Response capabilities. Integrate with existing Security Stack Solutions to provide complete visibility and event monitoring.

AGENCIES: Use this form to provide details about enhancement requests in your agency's FY 2026 budget request.

REQUIRED SECTIONS

- Sections I-IV for ALL requests.
- Section V for Type D/E requests. Types A, B, and C can complete this section to be considered for an evidence rating.
- Section VII for Type F requests.
- Section VI optional for all requests.

You must also submit a completed Form 2 Summary spreadsheet, including spend plan details for each enhancement request.

IMPORTANT: Agencies are limited to three Type D & E enhancement requests for FY 2026. If more than three Type D & E enhancements are submitted, OBPM will only consider and analyze the highest ranked.

RACIAL EQUITY BUDGET TOOL (REBT)
The Office of Racial Equity (ORE) has developed the Racial Equity Budget Tool (REBT) to guide agencies in assessing how their budgets benefit and/or negatively impact communities based on race, specifically Black,

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Will legislative support be required to implement this enhancement?* YES NO
If yes, please submit a proposed BSA subtitle using Attachment D.

Has this enhancement request been submitted in past formulation cycles?* YES NO
If yes, in which fiscal years was it submitted? Mark all that apply.

FY 2025 FY 2024 FY 2023 FY 2022 FY 2021

SECTION II. RATIONALE *Required for ALL requests*

What problem facing the District will this enhancement address and why does this problem exist?*

Please provide as much detail as possible. Responses that identify and quantify specific problems will receive more favorable consideration.

Current platform needs to be enhanced to upgrade to Windows 11, replace current Data Loss Prevention solution, improve Data Life Cycle and Governance Management, upgrade end-point MFA solution, manage HSM/KMS encryption keys, and provide security operations monitoring.

How does this enhancement address this problem and its underlying causes?*

Please provide as much detail as possible. Responses that clearly demonstrate how the proposed enhancement will address the underlying causes will receive more favorable consideration. Please describe any data the agency has collected and/or any analysis the agency has conducted to understand the problem and its potential solutions.

Enhanced security will be in place once the platform changes are made. In addition to moving off Windows 10 before its end-of life, we will be upgrading existing security systems and improving our ability to monitor our infrastructure.

Is this enhancement meant to sustain a project initiated with non-local funding (e.g. ARPA, federal grants, SPRs)?

YES NO

If yes, please provide a rationale for why these non-local funds are no longer available:

Click or tap here to enter text.

How can this enhancement be scaled down to be accommodated within a constrained budget?*

Scaling can occur in FY 2026 or the out-years and can be based on fewer residents served, scaled back staffing, adjusted implementation timeline, etc. Please add a new row for each scaled down scenario and rank the scaled down options in order of agency preference.

Use the text box below the table to provide additional detail. If the enhancement cannot be scaled down, please indicate so in the textbox.

RANKING	Describe each proposed approach to scale down the enhancement request and explain the expected impact with each scenario	FY 2026	FY 2027	FY 2028	FY 2029
1	[scenario title]: [description and expected impact]	[enter \$]	[enter \$]	[enter \$]	[enter \$]
2	[scenario title]: [description and expected impact]	[enter \$]	[enter \$]	[enter \$]	[enter \$]

Rollout of Windows 11 can't be scaled back. The new monitoring tools will work across the infrastructure and can't be scaled back but may provide operational efficiencies and the ability to reduce costs in future years.

SECTION II. RATIONALE (continued) *Required for ALL requests*

QUESTIONS SPECIFIC TO ENHANCEMENT TYPE*

Mark the appropriate enhancement type and use the space below the table to answer the questions for that enhancement type.

IF YOUR ENHANCEMENT TYPE IS...	THEN ANSWER THESE QUESTIONS...
<input type="checkbox"/> A. Restore previous reduction or one-time funding	Why is the restoration of this reduction critical for the District at this time? What negative impact will result if this reduction is not restored? Please cite any relevant agency performance measures or other data that support your response.
<input checked="" type="checkbox"/> B. Increased cost to <u>maintain</u> existing activity	Why are costs increasing to maintain existing levels of service? What are the main cost drivers and what options have the agency already implemented or considered implementing to lower these costs? <i>Changes to the number of people served or the type of services provided should be categorized as a Type D request.</i>
<input type="checkbox"/> C. Operational improvement with a strong business case	How will this enhancement help the District save money in this or future fiscal years? How much will it save?
<input type="checkbox"/> D. Expand high-performing existing activity	Why is this program or activity considered to be high performing? How do the outputs or outcomes compare to those of similar programs within or outside of District government? Please cite any relevant agency performance measures or other data that support your response.
<input type="checkbox"/> E. Completely new activity with highly likely or proven positive outcomes	What will be the District's return on investment, as measured by how many and/or which District residents are served, or some other measure?

Responses to Questions*

Like many other agencies, the OCFO needs to upgrade the operating system of laptops and desktops to Windows 11. We are also replacing existing solutions for data loss prevention, MFA and encryption keys management. These costs will improve security.

Form 2 Detail: FY 2026 Enhancement Request
 FY 2026 Agency Budget Request

SECTION III. PERFORMANCE RATIONALE & IMPACT *Required for ALL requests*

PERFORMANCE IMPACT

What data will the agency collect to understand the impact of this enhancement?*

Data may include measurements of the demand or need for programs over time, monitoring the quality and/or efficiency of programs, and/or assessing the impact of the enhancement on longer term goals. Please list specific data sources that will be collected and analyzed.

In implementing new security tools the infrastructure group will roll out an integrated view of the security products to improve monitoring.

PERFORMANCE TEAM IS HERE TO HELP!
 Need help thinking through this section or identifying data sources or performance measures? Reach out to your OBPM Performance Analyst or to Chief Performance Officer Lia Katz (lia.katz@dc.gov).

What challenges or risks does the agency anticipate related to this enhancement request? What mitigation or management strategies will the agency adopt to address those challenges?

Not replacing the existing operating system or equipment and only upgrading aging software leaves the agency vulnerable in its security posture against increasingly sophisticated tools used to exploit known avenues for attacking networks.

Will any performance measures currently in the agency's performance plan be impacted by this enhancement? What new measures will be added to understand the impact of the enhancement?*

- If you are proposing a new metric, write "NEW" in the columns for FY 2024 and FY 2025.
- Identify the "measure type: will the metric measure quantity; quality; efficiency; outcome; context; or is a District wide indicator of environmental trends.
- Please provide the previous year's data and the current year's target for the metric. Please also provide the anticipated targets for next year in the case that (a) the enhancement is funded and (b) the enhancement is not funded.

Enhancement aims to maintain and enhance existing security profile.

Form 2 Detail: FY 2026 Enhancement Request
 FY 2026 Agency Budget Request



Performance Measure	New for FY26?	Measure Type	Which direction is desired?	FY 2024 Actual	FY 2025 Target	Anticipated FY 2026 Target	
						With enhancement funding	Without enhancement funding
[enter]	[Select...]	[Select...]	[enter]	[enter]	[enter]	[enter]	[enter]
[enter]	[Select...]	[Select...]	[enter]	[enter]	[enter]	[enter]	[enter]
[enter]	[Select...]	[Select...]	[enter]	[enter]	[enter]	[enter]	[enter]

SECTION IV. BUDGETING FOR RACIAL EQUITY

Required for ALL requests

Is one of the goals of this enhancement to reduce or eliminate a racial equity gap?*

 YES NO

Which of the four goals in the District's [Racial Equity Action Plan](#) (REAP) or your agency specific REAP does this enhancement request advance?*. Check all that apply.

- 1. Improving DC Government staff understanding and commitment to achieving racial equity (e.g., training, capacity building, or use of racial equity tools)
- 2. Reducing or eliminating a known racial and ethnic inequity (domains include housing, health, economic opportunity, safety, education, neighborhood life, and civic engagement)
- 3. Enhancing opportunities to meaningfully engage DC residents in decision-making processes and strengthening partnerships
- 4. Improving DC government ability to be an equitable employer and engage in racially equitable hiring, promotion, and retention practices (e.g., building pipelines with HBCU/HSI, staff development funds, or community of practice on hiring)

What racial inequity or REAP sub-goal(s) does this enhancement request address?*

For example, health disparity, educational gap, disproportionality in housing, bolstering existing community resources, etc. Please be as specific as possible. For REAP goals, please list the specific action (e.g. 1B, see District's REAP for supporting actions).

[Click or tap here to enter text.](#)

What is the rationale for addressing the inequity in this way and/or with this program?*

For example, is the enhancement in response to a legislative requirement or mandate, community engagement efforts, demographic data, or something else?

[Click or tap here to enter text.](#)

In what ways have you meaningfully involved internal and external stakeholders in the development of your agency's budget request, including staff and communities of color?*. See ORE's [Meaningful Community Engagement Guide](#).

[Click or tap here to enter text.](#)

If this budget enhancement could potentially cause unintended benefits or burdens, please detail what racial or ethnic groups might be positively or negatively impacted.* For example, the location for a new airport could disrupt traffic patterns and create noise and air pollution that impact residents in the immediate vicinity, which could worsen racial health inequities.

[Click or tap here to enter text.](#)

SECTION V. EVIDENCE-BASED BUDGETING

Required for Type D & E requests. Optional for Types A, B & C.

This section is required for all Type D and E enhancement requests that would expand existing activities or launch completely new activities. This section may be completed for Type A, B and C enhancement requests to be considered for an evidence rating.

If the activities described in this enhancement are successfully implemented, what outcome(s) will improve?* OBPM expects that it will be possible for agencies to identify for almost all enhancement requests a new performance measure (Section III of this form) that aligns with the outcome measures identified in the evidence provided. If this is not feasible, please explain below.

Click or tap here to enter text.

What evidence supports the likelihood that this enhancement will achieve the desired outcome?*

Please describe the quantitative studies or other measures that show the outcomes of similar efforts previously undertaken in the District or in other cities (see sidebar for what OBPM will look for to review enhancements as evidence-based or supported by preliminary evidence). Provide links to cite your sources, which may include formal evaluation studies, evidence standards, or evidence clearinghouses.

Click or tap here to enter text.

Which parts of your enhancement are identical to the model(s) the evidence comes from?*

As applicable, your answer should describe sameness in the target population, intervention, and availability of inputs/resources needed, etc.

Click or tap here to enter text.

Which parts of your enhancement are different from the model(s) evaluated in the studies linked?*

Explain why deviations are necessary for success in DC.

Click or tap here to enter text.

Are you building or planning to build evidence to support this enhancement using a formal program evaluation?*

YES NO

If yes, please describe or link below to the planned evaluation design, research question(s), and timeline for results.

Click or tap here to enter text.

THE LAB@DC TEAM IS HERE TO HELP!

Have questions about the evidence? Email the.lab@dc.gov (and CC your OBPM Budget Analyst). The Lab can pre-review evidence, brainstorm future evaluation ideas, offer suggestions on where to look for evidence, and help you think through the evidence you've found.

HELPFUL TIPS TO GET STARTED:

In general, evidence ratings follow the principles listed below; the quality of the evidence provided and how well it matches the enhancement may also affect the final evidence rating:

- Experimental studies (also called randomized evaluations or randomized control trials) that show that a program or intervention *caused* an outcome may receive a **STRONG/4-star** evidence rating
- Quasi-experimental studies that suggest that a program or intervention *caused* an outcome by comparing outcomes between the group receiving the enhancement and a very similar group that doesn't receive the enhancement may receive a **MODERATE/3-star** evidence rating
- Correlational studies with appropriate statistical controls may receive a **PROMISING/2-star** evidence rating
- Before-and-after comparison studies (also called pre-post comparison studies) may receive a **SOME/1-star** evidence rating

Consider the positive impact(s) this enhancement should have on District residents or government operations. These are the outcome(s) of the enhancement. Try searching [Google Scholar](#) or a similar database for relevant existing research. Government evidence clearinghouses (like [What Works Clearinghouse](#) for education and [CrimeSolutions](#) for public safety) are also good places to search according to specialized topics.

SECTION VI. PROJECT PLAN *Optional for All Requests*

This section is optional. However, it is recommended for Type D and E enhancement requests that would expand existing activities or launch completely new activities.

This project plan can be used to show how the agency will deliver the intended results before the end of the fiscal year. Complete as best you can, knowing the plan might evolve.

PROJECT OWNER

Who is the single person who will be most responsible for this initiative? If the project owner must be hired, specify who will own the project until that time.

NAME Click or tap here to enter text.
 TITLE Click or tap here to enter text.
 EMAIL Click or tap here to enter text.
 PHONE Click or tap here to enter text.

BUSINESS PARTNER COORDINATION

What other agencies or stakeholders would be critical to this project’s success, and what communication have you had with them?

Click or tap here to enter text.

PROJECT TIMELINE

Describe below anticipated implementation milestones by quarter to show how the agency will deliver the intended results. Please identify specific months or dates, if known.

PREPARATION FOR PROJECT LAUNCH (before start of fiscal year)	
FY 2025 Q4	[enter]
FISCAL YEAR STARTS, FUNDS DISBURSED	
FY 2026 Q1	[enter]
FY 2026 Q2	[enter]
FY 2026 Q3	[enter]
FY 2026 Q4	[enter]

Form 2 Detail: FY 2025 Enhancement Request
 FY 2025 Agency Budget Request



Complete a separate Form 2 for each enhancement request.

SECTION I. OVERVIEW Required for ALL requests

ENHANCEMENT TITLE* FY25 IT Upgrades Project	ENHANCEMENT PRIORITY* 1 OUT OF 1
AGENCY* Office of the Chief Financial Officer	AGENCY CODE* ATO
AGENCY POINT OF CONTACT* Alok Chadda or James Snight	POINT OF CONTACT EMAIL* Alok.chadda@dc.gov or james.snight@dc.gov

REQUEST TYPE*
 Mark the one request type that best describes this enhancement. No type is preferred over any other, but the questions in **Section II: Rationale** differ by type.

- A. Restore previous reduction or one-time funding } Complete Sections I-IV.
- B. Increased cost to maintain existing activity } Complete Section V to be considered for evidence rating.
- C. Operational improvement with strong business case

- D. Expand high-performing existing activity } Complete Sections I-V.
- E. Completely new activity with highly likely or proven positive outcomes
- F. Continue ARPA SLFRF project } Complete Sections I-VII.

FUNDING REQUEST*

Enter amount of Local Funds requested and indicate whether funds are one-time or recurring.

FY 2025 PERSONAL SERVICES (PS)	FY 2025 NON-PERSONAL SERVICES (NPS)	FY 2025 TOTAL REQUEST AMOUNT
0.00	945,200.00	945,200.00

ONE-TIME
 PARTIALLY RECURRING
 RECURRING

FUTURE COSTS*

If recurring, enter estimated costs over next four years.

TOTAL FY 2026	TOTAL FY 2027	TOTAL FY 2028
945,200.00	945,200.00	945,200.00

ENHANCEMENT SUMMARY*

In your response:

- State the problem this enhancement is designed to address
- Describe what the enhancement is and/or how it will work
- Describe the impact the enhancement will have on the problem

IT Upgrade projects that are completing implementation in FY24 will need operational support in FY25:

A cloud based Contact Center as a Service (CCaaS) will replace an aging Telephony call center system with a cloud-based subscription service contact center to serve the Office of Tax and Revenue (Customer Service Administration, Collections and Enforcement administration, Return Integrity Unit, Recorder of deeds, E-services), the Office of the Chief Information Officer and the Office of Finance and Treasury’s Central Collection Unit, and Unclaimed Property (current Aspect/Alvaria users) as well as the Office of Financial Operations and Systems’ Office of Pay and Retirement Services. All of these teams are contacted daily for assistance. CCaaS provides an omnichannel system transforming the organization from a call center to contact center – including IVR, chatbot and callback features – maintained and supported by our subscription with the supplier. This removes

AGENCIES: Use this form to provide details about enhancement requests in your agency’s FY 2025 budget request.

REQUIRED SECTIONS

- **Sections I-IV** for ALL requests.
- **Section V** for Type D/E requests. *Types A, B, and C can complete this section to be considered for an evidence rating.*
- **Section VII** for Type F requests.
- **Section VI** optional for all requests.

You must also submit a completed Form 2 Summary spreadsheet, including spend plan details for each enhancement request.

IMPORTANT: Agencies are limited to three Type D, E, or F enhancement requests for FY 2025.

RACIAL EQUITY BUDGET TOOL (REBT)

The Office of Racial Equity (ORE) has developed the Racial Equity Budget Tool (REBT) to guide agencies in assessing how their budgets benefit and/or negatively impact communities based on race, specifically Black, Indigenous, and People of Color (BIPOC) communities. Please use **Section IV** to show how your agency

EDITING RESTRICTIONS: This form uses editing restrictions to ensure consistent displays of information. If needed, the restrictions can be disabled by going to the Review tab at the top of the window, clicking on Protect, then Restrict Editing, and clicking Stop Protection. If prompted for a password, click OK.

Form 2 Detail: FY 2025 Enhancement Request

FY 2025 Agency Budget Request

server deployment and maintenance costs as an OCIO responsibility. Annual support cost, less legacy support savings: \$605,000

CAMA Mobile Assessor Support: Newly implemented mobile application allows for onsite assessments by OTR's team to be recorded in real time and transmitted back to the Computer Aided Mass Appraisal system. This process improvement results in less delay in the review and approval of assessments. Additional benefits are increased Appraisal capacity, Efficiency with Prepwork (no more printing, paper and time savings), Efficient Field work (Updates on Ipad including appraiser notes, updates, sketches, and photos), and Elimination of duplicate data entry with Automated Data integrity Checks. Annual support cost: \$140,200.00.

Reston Tape Library: The transfer of primary network and application functions from the Waterfront facility to the OCTO Data Center requires the maintenance and support of the tape library needed to back-up and restore servers. Annual support cost: \$100,000.

DR SAN: The OCFO has established a Disaster Recovery Storage Area Network (SAN) in the OCTO Data Center. The SAN requires an annual maintenance and support agreement to keep the SAN under support. Annual cost: \$100,000.

Will legislative support be required to implement this enhancement?*

If yes, please submit a proposed BSA subtitle using Attachment D.

YES NO

Does this enhancement advance a District Recovery Goal?*

If yes, please select from the dropdown list.

YES NO

**Oversight, Accountability,
Efficiency**

SECTION II. RATIONALE *Required for ALL requests*

What problem facing the District will this enhancement address and why does this problem exist?*

Please provide as much detail as possible. Responses that identify and quantify specific problems will receive more favorable consideration.

[See detailed description above.](#)

How does this enhancement address this problem and its underlying causes?*

Please provide as much detail as possible. Responses that clearly demonstrate how the proposed enhancement will address the underlying causes will receive more favorable consideration. Please describe any data the agency has collected and/or any analysis the agency has conducted to understand the problem and its potential solutions.

[See detailed description above.](#)

How can this enhancement be scaled down to be accommodated within a constrained budget?

Scaling can occur in FY 2025 or the out-years and can be based on fewer residents served, scaled back staffing, adjusted implementation timeline, etc. Please add a new row for each scaled down scenario. Use the text box below the table to provide any additional detail.

NOTE: This question is optional, but providing OBPM with scaling options can increase the likelihood of the enhancement being funded even within a constrained budget environment.

Describe each proposed approach to scale down the enhancement request. Explain how the approach leads to a lower request amount.	FY 2025	FY 2026	FY 2027	FY 2028
[scenario title]: [description and rationale]	[enter \$]	[enter \$]	[enter \$]	[enter \$]
[scenario title]: [description and rationale]	[enter \$]	[enter \$]	[enter \$]	[enter \$]

[Click or tap here to enter text.](#)

SECTION II. RATIONALE (continued) *Required for ALL requests*

QUESTIONS SPECIFIC TO ENHANCEMENT TYPE*

Mark the appropriate enhancement type and use the space below the table to answer the questions for that enhancement type.

IF YOUR ENHANCEMENT TYPE IS...	THEN ANSWER THESE QUESTIONS...
<input type="checkbox"/> A. Restore previous reduction or one-time funding	Why is the restoration of this reduction critical for the District at this time? What negative impact will result if this reduction is not restored? Please cite any relevant agency KPIs, workload measures, or other data that support your response.
<input checked="" type="checkbox"/> B. Increased cost to <u>maintain</u> existing activity	Why are costs increasing to maintain existing levels of service? What are the main cost drivers and what options have the agency already implemented or considered implementing to lower these costs? <i>Changes to the number of people served or the type of services provided should be categorized as a Type D request.</i>
<input checked="" type="checkbox"/> C. Operational improvement with a strong business case	How will this enhancement help the District save money in this or future fiscal years? How much will it save?
<input type="checkbox"/> D. Expand high-performing existing activity	Why is this program or activity considered to be high performing? How do the outputs or outcomes compare to those of similar programs within or outside of District government? Please cite any relevant agency KPIs, workload measures, or other data that support your response.
<input type="checkbox"/> E. Completely new activity with highly likely or proven positive outcomes	What will be the District's return on investment, as measured by how many and/or which District residents are served, or some other measure?
<input type="checkbox"/> F. Continuation of ARPA SLFRF project	Complete Section VII.

Responses to Questions*

See detailed description above. These system upgrades provide higher levels of service to District taxpayers and property owners. The upgrades using the OCTO Data Center are needed to reduce the risk of data loss and the potentially severe consequences of such losses.

SECTION III. PERFORMANCE RATIONALE & IMPACT *Required for ALL requests*

IMPACT STATEMENT

In 2-3 sentences, describe the expected positive impact of this enhancement on District residents or government operations.*

See detailed description above.

PERFORMANCE IMPACT

What data will the agency collect to understand the impact of this enhancement?*

Data may include measurements of the demand or need for programs over time, monitoring the quality and/or efficiency of programs, and/or assessing the impact of the enhancement on longer term goals. Please list specific data sources that will be collected and analyzed.

The call center and mobile assessor systems provide reports on various aspects of system usage, expanding the scope of data available to managers and staff using these systems relative to current operations.

What challenges or risks does the agency anticipate related to this enhancement request? What mitigation or management strategies will the agency adopt to address those challenges?

As with any system implementation, managers will need to be vigilant in participating along with staff in reporting any system questions or difficulties, working together with the implementers to address issues as they arise.

Will any performance measures currently in the agency's performance plan be impacted by this enhancement? What new measures will be added to understand the impact of the enhancement?*

If you are proposing a new metric, write "NEW" in the columns for FY 2022-2023. Metrics can be measurements of outputs, desired outcomes, operational efficiency, inputs or resources, or volume of demand or work for a particular program. Metrics may appear in both tables in this section.

PERFORMANCE TEAM IS HERE TO HELP!
 Need help thinking through this section or identifying data sources, KPIs, or Workload Measures? Reach out to your OBPM Performance Analyst or to Chief Performance Officer Lia Katz (lia.katz@dc.gov).

HELPFUL TIPS & DEFINITIONS

- **Key Performance Indicators (KPIs)** are quantitative measures of performance associated with targets. They typically include a statistic, like a percentage, and an object, like "tickets dismissed when contested."
- **Workload Measures (WMs)** measure the volume of work performed—e.g., the number of parking tickets issued—and do not have associated targets. Typically, workload measures provide information about service demand.
- **In most cases, agency activities do not aim to increase or decrease workload measures.** In rare instances, if an agency is working to increase or decrease volume of work directly, a measure may be tracked as a KPI, with an associated target (e.g., "number of trees planted.").

Key Performance Indicator (KPI) or Workload Measure (WM)	New for FY24?	If new, explain how this metric was developed:	Which direction is desired?	FY 2022 Actual	FY 2023 Target	FY 2023 Actual
[enter]	[enter]	[enter]	[enter]	[enter]	[enter]	[enter]
[enter]	[enter]	[enter]	[enter]	[enter]	[enter]	[enter]

Form 2 Detail: FY 2025 Enhancement Request
FY 2025 Agency Budget Request



[enter]	[enter]	[enter]	[enter]	[enter]	[enter]
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SECTION IV. BUDGETING FOR RACIAL EQUITY

Required for ALL requests

Is one of the goals of this enhancement to reduce or eliminate a racial equity gap?*

 YES NOWhich of the four goals in the District's [Racial Equity Action Plan](#) (REAP) or your agency-specific REAP does this enhancement request advance?*. Check all that apply.

1. Improving DC Government staff understanding and commitment to achieving racial equity (e.g., training, capacity building, or use of racial equity tools)
2. Reducing or eliminating a known racial and ethnic inequity (domains include housing, health, economic opportunity, safety, education, neighborhood life, and civic engagement)
3. Enhancing opportunities to meaningfully engage DC residents in decision-making processes and strengthening partnerships
4. Improving DC government ability to be an equitable employer and engage in racially equitable hiring, promotion, and retention practices (e.g., building pipelines with HBCU/HSI, staff development funds, or community of practice on hiring)

What racial inequity or REAP sub-goal(s) does this enhancement request address?*

For example, health disparity, educational gap, disproportionality in housing, bolstering existing community resources, etc. Please be as specific as possible. For REAP goals, please list the specific action (e.g. 1B, see District's REAP for supporting actions).

[Click or tap here to enter text.](#)

What is the rationale for addressing the inequity in this way and/or with this program?*

For example, is the enhancement in response to a legislative requirement or mandate, community engagement efforts, demographic data, or something else?

[Click or tap here to enter text.](#)In what ways have you meaningfully involved internal and external stakeholders in the development of your agency's budget request, including staff and communities of color?*. See ORE's [Meaningful Community Engagement Guide](#).[Click or tap here to enter text.](#)

If this budget enhancement could potentially cause unintended benefits or burdens, please detail what racial or ethnic groups might be positively or negatively impacted.* For example, the location for a new airport could disrupt traffic patterns and create noise and air pollution that impact residents in the immediate vicinity, which could worsen racial health inequities.

[Click or tap here to enter text.](#)

SECTION V. EVIDENCE-BASED BUDGETING*Required for Type D, E & F requests. Optional for Types A, B & C.*

This section is required for all Type D, E, and F enhancement requests that would expand existing activities, launch completely new activities, or continue ARPA SLFRF projects. This section may be completed for Type A, B and C enhancement requests to be considered for an evidence rating.

What evidence supports the likelihood that this enhancement will achieve the desired outcome?*

Please describe the quantitative studies or other measures that show the outcomes of similar efforts previously undertaken in the District or in other cities (see sidebar for what OBPM will look for to review enhancements as evidence-based or supported by preliminary evidence). Provide links to cite your sources, which may include formal evaluation studies, evidence standards, or evidence clearinghouses.

[Click or tap here to enter text.](#)

Which parts of your enhancement are identical to the model(s) the evidence comes from?*

If the enhancement is identical to the model in the evidence and the population served is similar, how will you ensure your agency implements the model in the same way? If your enhancement includes just a part of the model or serves a different population, describe how it differs and why that deviation is necessary for success in DC.

[Click or tap here to enter text.](#)

Are you building or planning to build evidence to support this enhancement using a formal program evaluation?*

YES NO

If yes, please describe or link below to the planned evaluation design, research question(s), and timeline for results.

[Click or tap here to enter text.](#)

THE LAB@DC TEAM IS HERE TO HELP!

Have questions about the evidence? Email the.lab@dc.gov (and CC your OBPM Budget Analyst). The Lab can pre-review evidence, brainstorm future evaluation ideas, offer suggestions on where to look for evidence, and help you think through the evidence you've found.

HELPFUL TIPS & DEFINITIONS:

Enhancements that are evidence-based are those for which the investment is partially or fully supported by quantitative data from one or more:

- Experimental studies (also called randomized evaluations or randomized control trials)
- Quasi-experimental studies that compare outcomes between the group receiving the enhancement and a very similar group that doesn't receive the enhancement

Enhancements with preliminary evidence include those supported by:

- Quantitative studies or data (like KPIs) that measure recipients' outcomes after the program or compare outcomes before and after
- Benchmark analyses or other data that compare outcomes for recipients to outcomes for non-recipients.

Which KPI or Workload Measure listed in Section III (Performance Rationale & Impact) captures the most important outcome(s) in the evidence cited?* OBPM expects that it will be possible for agencies to identify for almost all enhancement requests a new or existing KPI or workload measure that aligns with the outcome measures identified in the evidence provided. If this is not feasible, please explain below.

[Click or tap here to enter text.](#)

SECTION VI. PROJECT PLAN *Optional for All Requests*

This section is optional. However, it is recommended for Type D, E, and F enhancement requests that would expand existing activities, launch completely new activities, or continue ARPA SLFRF projects.

This project plan can be used to show how the agency will deliver the intended results before the end of the fiscal year. Complete as best you can, knowing the plan might evolve.

PROJECT OWNER

Who is the single person who will be most responsible for this initiative? If the project owner must be hired, specify who will own the project until that time.

NAME [Click or tap here to enter text.](#)
 TITLE [Click or tap here to enter text.](#)
 EMAIL [Click or tap here to enter text.](#)
 PHONE [Click or tap here to enter text.](#)

BUSINESS PARTNER COORDINATION

What other agencies or stakeholders would be critical to this project’s success, and what communication have you had with them?

[Click or tap here to enter text.](#)

PROJECT TIMELINE

Describe below anticipated implementation milestones by quarter to show how the agency will deliver the intended results. Please identify specific months or dates, if known.

PREPARATION FOR PROJECT LAUNCH (before start of fiscal year)	
FY 2024 Q4	[enter]
FISCAL YEAR STARTS, FUNDS DISBURSED	
FY 2025 Q1	[enter]
FY 2025 Q2	[enter]
FY 2025 Q3	[enter]
FY 2025 Q4	[enter]

Form 2 Detail: FY 2025 Enhancement Request
 FY 2025 Agency Budget Request

SECTION VII. REQUESTS TO CONTINUE ARPA-FUNDED PROJECTS

Required for all Type F requests.

PROJECT INFORMATION

PROJECT NAME [Click or tap here to enter text.](#)

PROJECT CODE [Click or tap here to enter text.](#)

ARPA FUND TYPE [Select...](#)

PROJECT PERFORMANCE & RATIONALE

Please refer to the FRF Clearance Request Memo for this project to answer the following questions.

What stated problems did this project set out to address?* [Click or tap here to enter text.](#)

To what extent has this project addressed these stated problems?* [Click or tap here to enter text.](#)

How will more years of funding help address these stated problems?* [Click or tap here to enter text.](#)

To what extent did this work exist before the creation of this ARPA-funded project?* For example, was the project an augmentation of existing work or a brand-new initiative? [Click or tap here to enter text.](#)

Why should this project continue beyond the end of the COVID public health emergency?* [Click or tap here to enter text.](#)

Please summarize any changes to the project design or scope since receiving clearance to spend funds.* [Click or tap here to enter text.](#)

Form 2 Detail: FY 2025 Enhancement Request
 FY 2025 Agency Budget Request

Complete a separate Form 2 for each enhancement request.

SECTION I. OVERVIEW Required for ALL requests

ENHANCEMENT TITLE* ENHANCEMENT PRIORITY*
Merchant Services **1** OUT OF **1**

AGENCY* AGENCY CODE*
 Office of Finance and Treasury **ATO**

AGENCY POINT OF CONTACT* POINT OF CONTACT EMAIL*
 Jeanne Hoover Jeanne.hoover@dc.gov

- REQUEST TYPE***
 Mark the one request type that best describes this enhancement. No type is preferred over any other, but the questions in **Section II: Rationale** differ by type.
- A. Restore previous reduction or one-time funding } Complete Sections I-IV.
 - B. Increased cost to maintain existing activity } Complete Section V to be considered for evidence rating.
 - C. Operational improvement with strong business case
 - D. Expand high-performing existing activity } Complete Sections I-V.
 - E. Completely new activity with highly likely or proven positive outcomes
 - F. Continue ARPA SLFRF project } Complete Sections I-VII.

FUNDING REQUEST*
 Enter amount of Local Funds requested and indicate whether funds are one-time or recurring.

FY 2025 PERSONAL SERVICES (PS)	FY 2025 NON-PERSONAL SERVICES (NPS)	FY 2025 TOTAL REQUEST AMOUNT
[enter amount]	1,800,000	1,800,000

ONE-TIME
 PARTIALLY RECURRING
 RECURRING

FUTURE COSTS*
 If recurring, enter estimated costs over next four years.

TOTAL FY 2026	TOTAL FY 2027	TOTAL FY 2028
2,300,000	2,800,000	3,300,000

- ENHANCEMENT SUMMARY***
 In your response:
- State the problem this enhancement is designed to address
 - Describe what the enhancement is and/or how it will work
 - Describe the impact the enhancement will have on the problem

Problem Statement:
 The Office of Finance and Treasury uses merchant service processors as a tool for accepting payments for services rendered throughout various District agencies. Electronic Banking recently contracted with JPM Chase Paymentech to accept American Express along with current brands VISA, Mastercard, and Discover. During the past two years of the D.C. health emergency pandemic, there has been an increased number of merchant accounts as well as merchant processing to the JPM Chase Paymentech processing platform. As a result, merchant services processing fees have increased significantly. These are the fees charged by the processor for each transaction. The increased level of card brand acceptance has also increased the cost of merchant fees.

Proposed Solution:
 The District had begun to pursue merchant services processing changes that would pass along the processing cost (transaction cost) to the customer as a “convenience fee.” However, due to the cancellation of the Convenience Fee Implementation with DMV and

AGENCIES: Use this form to provide details about enhancement requests in your agency’s FY 2025 budget request.

- REQUIRED SECTIONS**
- **Sections I-IV** for ALL requests.
 - **Section V** for Type D/E requests. *Types A, B, and C can complete this section to be considered for an evidence rating.*
 - **Section VII** for Type F requests.
 - **Section VI** optional for all requests.

You must also submit a completed Form 2 Summary spreadsheet, including spend plan details for each enhancement request.

IMPORTANT: Agencies are limited to three Type D, E, or F enhancement requests for FY 2025.

RACIAL EQUITY BUDGET TOOL (REBT)
 The Office of Racial Equity (ORE) has developed the Racial Equity Budget Tool (REBT) to guide agencies in assessing how their budgets benefit and/or negatively impact communities based on race, specifically Black, Indigenous, and People of Color (BIPOC) communities. Please use **Section IV** to show how your agency

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Form 2 Detail: FY 2025 Enhancement Request
FY 2025 Agency Budget Request



other agencies, OCFO needs the full funding required for these merchant fee processing costs.

Will legislative support be required to implement this enhancement?*

If yes, please submit a proposed BSA subtitle using Attachment D.

YES NO

Does this enhancement advance a District Recovery Goal?*

If yes, please select from the dropdown list.

YES NO

Select...

SECTION II. RATIONALE *Required for ALL requests*

What problem facing the District will this enhancement address and why does this problem exist?*

Please provide as much detail as possible. Responses that identify and quantify specific problems will receive more favorable consideration.

Problem Statement:

The Office of Finance and Treasury, uses merchant service processors as a tool for accepting payments for services rendered throughout various District agencies. Electronic Banking recently contracted with JPM Chase Paymentech to accept American Express along with current brands VISA, Mastercard, and Discover. During the past two years of the D.C. health emergency pandemic, there has been an increased number of merchant accounts as well as merchant processing to JPM Chase Paymentech processing platform. As a result, merchant fees have increased significantly. The increased level of card brand acceptance has also resulted in an increase of merchant fees cost.

How does this enhancement address this problem and its underlying causes?*

Please provide as much detail as possible. Responses that clearly demonstrate how the proposed enhancement will address the underlying causes will receive more favorable consideration. Please describe any data the agency has collected and/or any analysis the agency has conducted to understand the problem and its potential solutions.

Due to the cancellation of the Convenience Fee Implementation with DMV and other agencies, OCFO needs the full funding required to pay for these merchant fee processing costs.

How can this enhancement be scaled down to be accommodated within a constrained budget?

Scaling can occur in FY 2025 or the out-years and can be based on fewer residents served, scaled back staffing, adjusted implementation timeline, etc. Please add a new row for each scaled down scenario. Use the text box below the table to provide any additional detail.

NOTE: This question is optional, but providing OBPM with scaling options can increase the likelihood of the enhancement being funded even within a constrained budget environment.

Describe each proposed approach to scale down the enhancement request. Explain how the approach leads to a lower request amount.	FY 2025	FY 2026	FY 2027	FY 2028
[scenario title]: [description and rationale]	[enter \$]	[enter \$]	[enter \$]	[enter \$]
[scenario title]: [description and rationale]	[enter \$]	[enter \$]	[enter \$]	[enter \$]

[Click or tap here to enter text.](#)

SECTION II. RATIONALE (continued)

Required for ALL requests

QUESTIONS SPECIFIC TO ENHANCEMENT TYPE*

Mark the appropriate enhancement type and use the space below the table to answer the questions for that enhancement type.

IF YOUR ENHANCEMENT TYPE IS...	THEN ANSWER THESE QUESTIONS...
<input type="checkbox"/> A. Restore previous reduction or one-time funding	Why is the restoration of this reduction critical for the District at this time? What negative impact will result if this reduction is not restored? Please cite any relevant agency KPIs, workload measures, or other data that support your response.
<input checked="" type="checkbox"/> B. Increased cost to <u>maintain</u> existing activity	Why are costs increasing to maintain existing levels of service? What are the main cost drivers and what options have the agency already implemented or considered implementing to lower these costs? Changes to the number of people served or the type of services provided should be categorized as a Type D request.
<input type="checkbox"/> C. Operational improvement with a strong business case	How will this enhancement help the District save money in this or future fiscal years? How much will it save?
<input type="checkbox"/> D. Expand high-performing existing activity	Why is this program or activity considered to be high performing? How do the outputs or outcomes compare to those of similar programs within or outside of District government? Please cite any relevant agency KPIs, workload measures, or other data that support your response.
<input type="checkbox"/> E. Completely new activity with highly likely or proven positive outcomes	What will be the District’s return on investment, as measured by how many and/or which District residents are served, or some other measure?
<input type="checkbox"/> F. Continuation of ARPA SLFRF project	<p>Complete Section VII.</p>

Responses to Questions*

The Office of Finance and Treasury, uses merchant service processors as a tool for accepting payments for services rendered throughout various District agencies. Electronic Banking recently contracted with JPM Chase Paymentech to accept American Express along with current brands VISA, Mastercard, and Discover. During the past two years of the D.C. health emergency pandemic, there has been an increased number of merchant accounts as well as merchant processing to JPM Chase Paymentech processing platform. As a result, merchant fees have increased significantly. The increased level of card brand acceptance has also resulted in an increase of merchant fees cost.

We proposed a “convenience fee” approach that would pass along these transaction fee costs to customers. This initiative did not go forward.

Form 2 Detail: FY 2025 Enhancement Request
 FY 2025 Agency Budget Request

SECTION III. PERFORMANCE RATIONALE & IMPACT *Required for ALL requests*

IMPACT STATEMENT

In 2-3 sentences, describe the expected positive impact of this enhancement on District residents or government operations.*

District residents will continue to be able to purchase services using a credit or debit card.

PERFORMANCE IMPACT

What data will the agency collect to understand the impact of this enhancement?*

Data may include measurements of the demand or need for programs over time, monitoring the quality and/or efficiency of programs, and/or assessing the impact of the enhancement on longer term goals. Please list specific data sources that will be collected and analyzed.

OFT will track and monitor specific agency usage.

What challenges or risks does the agency anticipate related to this enhancement request? What mitigation or management strategies will the agency adopt to address those challenges?

Click or tap here to enter text.

Will any performance measures currently in the agency's performance plan be impacted by this enhancement? What new measures will be added to understand the impact of the enhancement?*

N/A

PERFORMANCE TEAM IS HERE TO HELP!
 Need help thinking through this section or identifying data sources, KPIs, or Workload Measures? Reach out to your OBPM Performance Analyst or to Chief Performance Officer Lia Katz (lia.katz@dc.gov).

HELPFUL TIPS & DEFINITIONS

- **Key Performance Indicators (KPIs)** are quantitative measures of performance associated with targets. They typically include a statistic, like a percentage, and an object, like “tickets dismissed when contested.”
- **Workload Measures (WMs)** measure the volume of work performed—e.g., the number of parking tickets issued—and do not have associated targets. Typically, workload measures provide information about service demand.
- **In most cases, agency activities do not aim to increase or decrease workload measures.** In rare instances, if an agency is working to increase or decrease volume of work directly, a measure may be tracked as a KPI, with an associated target (e.g., “number of trees planted.”).

Key Performance Indicator (KPI) or Workload Measure (WM)	New for FY24?	If new, explain how this metric was developed:	Which direction is desired?	FY 2022 Actual	FY 2023 Target	FY 2023 Actual
[enter]	[enter]	[enter]	[enter]	[enter]	[enter]	[enter]
[enter]	[enter]	[enter]	[enter]	[enter]	[enter]	[enter]
[enter]	[enter]	[enter]	[enter]	[enter]	[enter]	[enter]

SECTION IV. BUDGETING FOR RACIAL EQUITY

Required for ALL requests

Is one of the goals of this enhancement to reduce or eliminate a racial equity gap?*

 YES NO

Which of the four goals in the District's [Racial Equity Action Plan](#) (REAP) or your agency-specific REAP does this enhancement request advance?* Check all that apply.

1. Improving DC Government staff understanding and commitment to achieving racial equity (e.g., training, capacity building, or use of racial equity tools)
2. Reducing or eliminating a known racial and ethnic inequity (domains include housing, health, economic opportunity, safety, education, neighborhood life, and civic engagement)
3. Enhancing opportunities to meaningfully engage DC residents in decision-making processes and strengthening partnerships
4. Improving DC government ability to be an equitable employer and engage in racially equitable hiring, promotion, and retention practices (e.g., building pipelines with HBCU/HSI, staff development funds, or community of practice on hiring)

What racial inequity or REAP sub-goal(s) does this enhancement request address?*

For example, health disparity, educational gap, disproportionality in housing, bolstering existing community resources, etc. Please be as specific as possible. For REAP goals, please list the specific action (e.g. 1B, see District's REAP for supporting actions).

N/A

What is the rationale for addressing the inequity in this way and/or with this program?*

For example, is the enhancement in response to a legislative requirement or mandate, community engagement efforts, demographic data, or something else?

N/A

In what ways have you meaningfully involved internal and external stakeholders in the development of your agency's budget request, including staff and communities of color?* See ORE's [Meaningful Community Engagement Guide](#).

N/A

If this budget enhancement could potentially cause unintended benefits or burdens, please detail what racial or ethnic groups might be positively or negatively impacted.* For example, the location for a new airport could disrupt traffic patterns and create noise and air pollution that impact residents in the immediate vicinity, which could worsen racial health inequities.

N/A

SECTION V. EVIDENCE-BASED BUDGETING*Required for Type D, E & F requests. Optional for Types A, B & C.*

This section is required for all Type D, E, and F enhancement requests that would expand existing activities, launch completely new activities, or continue ARPA SLFRF projects. This section may be completed for Type A, B and C enhancement requests to be considered for an evidence rating.

What evidence supports the likelihood that this enhancement will achieve the desired outcome?*

Please describe the quantitative studies or other measures that show the outcomes of similar efforts previously undertaken in the District or in other cities (see sidebar for what OBPM will look for to review enhancements as evidence-based or supported by preliminary evidence). Provide links to cite your sources, which may include formal evaluation studies, evidence standards, or evidence clearinghouses.

[Click or tap here to enter text.](#)

Which parts of your enhancement are identical to the model(s) the evidence comes from?*

If the enhancement is identical to the model in the evidence and the population served is similar, how will you ensure your agency implements the model in the same way? If your enhancement includes just a part of the model or serves a different population, describe how it differs and why that deviation is necessary for success in DC.

[Click or tap here to enter text.](#)

Are you building or planning to build evidence to support this enhancement using a formal program evaluation?*

YES NO

If yes, please describe or link below to the planned evaluation design, research question(s), and timeline for results.

[Click or tap here to enter text.](#)

THE LAB@DC TEAM IS HERE TO HELP!

Have questions about the evidence? Email the.lab@dc.gov (and CC your OBPM Budget Analyst). The Lab can pre-review evidence, brainstorm future evaluation ideas, offer suggestions on where to look for evidence, and help you think through the evidence you've found.

HELPFUL TIPS & DEFINITIONS:

Enhancements that are evidence-based are those for which the investment is partially or fully supported by quantitative data from one or more:

- Experimental studies (also called randomized evaluations or randomized control trials)
- Quasi-experimental studies that compare outcomes between the group receiving the enhancement and a very similar group that doesn't receive the enhancement

Enhancements with preliminary evidence include those supported by:

- Quantitative studies or data (like KPIs) that measure recipients' outcomes after the program or compare outcomes before and after
- Benchmark analyses or other data that compare outcomes for recipients to outcomes for non-recipients.

Which KPI or Workload Measure listed in Section III (Performance Rationale & Impact) captures the most important outcome(s) in the evidence cited?* OBPM expects that it will be possible for agencies to identify for almost all enhancement requests a new or existing KPI or workload measure that aligns with the outcome measures identified in the evidence provided. If this is not feasible, please explain below.

[Click or tap here to enter text.](#)

SECTION VI. PROJECT PLAN *Optional for All Requests*

This section is optional. However, it is recommended for Type D, E, and F enhancement requests that would expand existing activities, launch completely new activities, or continue ARPA SLFRF projects.

This project plan can be used to show how the agency will deliver the intended results before the end of the fiscal year. Complete as best you can, knowing the plan might evolve.

PROJECT OWNER

Who is the single person who will be most responsible for this initiative? If the project owner must be hired, specify who will own the project until that time.

NAME [Click or tap here to enter text.](#)
 TITLE [Click or tap here to enter text.](#)
 EMAIL [Click or tap here to enter text.](#)
 PHONE [Click or tap here to enter text.](#)

BUSINESS PARTNER COORDINATION

What other agencies or stakeholders would be critical to this project’s success, and what communication have you had with them?

[Click or tap here to enter text.](#)

PROJECT TIMELINE

Describe below anticipated implementation milestones by quarter to show how the agency will deliver the intended results. Please identify specific months or dates, if known.

PREPARATION FOR PROJECT LAUNCH (before start of fiscal year)	
FY 2024 Q4	[enter]
FISCAL YEAR STARTS, FUNDS DISBURSED	
FY 2025 Q1	[enter]
FY 2025 Q2	[enter]
FY 2025 Q3	[enter]
FY 2025 Q4	[enter]

Form 2 Detail: FY 2025 Enhancement Request

FY 2025 Agency Budget Request

SECTION VII. REQUESTS TO CONTINUE ARPA-FUNDED PROJECTS

Required for all Type F requests.

PROJECT INFORMATION

PROJECT NAME [Click or tap here to enter text.](#)PROJECT CODE [Click or tap here to enter text.](#)ARPA FUND TYPE [Select...](#)

PROJECT PERFORMANCE & RATIONALE

Please refer to the FRF Clearance Request Memo for this project to answer the following questions.

What stated problems did this project set out to address?* [Click or tap here to enter text.](#)

To what extent has this project addressed these stated problems?* [Click or tap here to enter text.](#)

How will more years of funding help address these stated problems?* [Click or tap here to enter text.](#)

To what extent did this work exist before the creation of this ARPA-funded project?* For example, was the project an augmentation of existing work or a brand-new initiative? [Click or tap here to enter text.](#)

Why should this project continue beyond the end of the COVID public health emergency?* [Click or tap here to enter text.](#)

Please summarize any changes to the project design or scope since receiving clearance to spend funds.* [Click or tap here to enter text.](#)

Form 2 Detail: FY 2026 Enhancement Request

FY 2026 Agency Budget Request



Complete a separate Form 2 for each enhancement request. Agencies are limited to three Type D & E enhancement requests.

SECTION I. OVERVIEW Required for ALL requests

ENHANCEMENT TITLE* ENHANCEMENT PRIORITY*
Oracle Communication # OUT OF #
Replacement

AGENCY* AGENCY CODE*
 Office of the Chief Financial Officer (OCFO) ATO

AGENCY POINT OF CONTACT* POINT OF CONTACT EMAIL*
 Click or tap here to enter text. Click or tap here to enter text.

- REQUEST TYPE***
 Mark the one request type that best describes this enhancement. No type is preferred over any other, but the questions in **Section II: Rationale** differ by type.
- A. Restore previous reduction or one-time funding } Complete Sections I-IV.
 - B. Increased cost to maintain existing activity } Complete Section V to be considered for evidence rating.
 - C. Operational improvement with strong business case
 - D. Expand high-performing existing activity } Complete Sections I-V.
 - E. Completely new activity with highly likely or proven positive outcomes

FUNDING REQUEST*
 Enter amount of Local Funds requested and indicate whether funds are one-time or recurring.

FY 2026 PERSONAL SERVICES (PS)	FY 2026 NON-PERSONAL SERVICES (NPS)	FY 2026 TOTAL REQUEST AMOUNT
\$0.00	\$351,600.00	\$351,600.00

ONE-TIME PARTIALLY RECURRING RECURRING

FUTURE COSTS*
 If recurring, enter estimated costs over next four years.

TOTAL FY 2027	TOTAL FY 2028	TOTAL FY 2029
\$351,600.00	\$369,180.00	\$387,264.00

- ENHANCEMENT SUMMARY***
 In your response:
- State the problem this enhancement is designed to address
 - Describe what the enhancement is and/or how it will work
 - Describe the impact the enhancement will have on the problem

The current interface platform used to communicate between Oracle’s Government Cloud and the District has been less than reliable. This has resulted in having to suspend the gateway connection until the problem has been resolved and then restart or rerun transactions to keep PASS and DIFS in sync. A replacement is needed to stabilize and improve data exchanges (files and real-time messaging).

Will legislative support be required to implement this enhancement?* YES NO
 If yes, please submit a proposed BSA subtitle using Attachment D.

AGENCIES: Use this form to provide details about enhancement requests in your agency’s FY 2026 budget request.

REQUIRED SECTIONS

- Sections I-IV for ALL requests.
- Section V for Type D/E requests. Types A, B, and C can complete this section to be considered for an evidence rating.
- Section VII for Type F requests.
- Section VI optional for all requests.

You must also submit a completed Form 2 Summary spreadsheet, including spend plan details for each enhancement request.

IMPORTANT: Agencies are limited to three Type D & E enhancement requests for FY 2026. If more than three Type D & E enhancements are submitted, OBPM will only consider and analyze the highest ranked.

RACIAL EQUITY BUDGET TOOL (REBT)
 The Office of Racial Equity (ORE) has developed the Racial Equity Budget Tool (REBT) to guide agencies in assessing how their budgets benefit and/or negatively impact communities based on race, specifically Black,

EDITING RESTRICTIONS: This form uses editing restrictions to ensure consistent displays of information. If needed, the restrictions can be disabled by going to the Review tab at the top of the window, clicking on Protect, then Restrict Editing, and clicking Stop Protection. If prompted for a password, click OK.

Form 2 Detail: FY 2026 Enhancement Request

FY 2026 Agency Budget Request

SECTION II. RATIONALE

Required for ALL requests

Has this enhancement request been submitted in past formulation cycles?

If yes, in which fiscal years was it submitted? Mark all that apply.

- FY 2025
 FY 2024
 FY 2023
 FY 2022
 FY 2021

YES NO

What problem facing the District will this enhancement address and why does this problem exist?*

Please provide as much detail as possible. Responses that identify and quantify specific problems will receive more favorable consideration.

The District needs to keep our procurement system (PASS) and our accounting system in the Cloud (DIFS) in sync with each other. The current platform provided by Oracle for reaching their Government Cloud has experienced disconnects, file transfer delays and required reprocessing of transactions.

How does this enhancement address this problem and its underlying causes?*

Please provide as much detail as possible. Responses that clearly demonstrate how the proposed enhancement will address the underlying causes will receive more favorable consideration. Please describe any data the agency has collected and/or any analysis the agency has conducted to understand the problem and its potential solutions.

Market research has shown that other public sector entities have deployed a commercial product and are not experiencing any of the timeouts, disconnects and delays experienced by the District.

Is this enhancement meant to sustain a project initiated with non-local funding (e.g. ARPA, federal grants, SPRs)?

If yes, please provide a rationale for why these non-local funds are no longer available:

YES NO

Click or tap here to enter text.

How can this enhancement be scaled down to be accommodated within a constrained budget?*

Scaling can occur in FY 2026 or the out-years and can be based on fewer residents served, scaled back staffing, adjusted implementation timeline, etc. Please add a new row for each scaled down scenario and rank the scaled down options in order of agency preference.

Use the text box below the table to provide additional detail. If the enhancement cannot be scaled down, please indicate so in the textbox.

RANKING	Describe each proposed approach to scale down the enhancement request and explain the expected impact with each scenario	FY 2026	FY 2027	FY 2028	FY 2029
1	[scenario title]: [description and expected impact]	[enter \$]	[enter \$]	[enter \$]	[enter \$]
2	[scenario title]: [description and expected impact]	[enter \$]	[enter \$]	[enter \$]	[enter \$]

Until the platform is in place and running efficiently it will not be possible to identify opportunities to scale back. The requirement that PASS and DIFS stay in sync may prevent us from scaling back or adjusting.

SECTION II. RATIONALE (continued) *Required for ALL requests*

QUESTIONS SPECIFIC TO ENHANCEMENT TYPE*

Mark the appropriate enhancement type and use the space below the table to answer the questions for that enhancement type.

IF YOUR ENHANCEMENT TYPE IS...	THEN ANSWER THESE QUESTIONS...
<input type="checkbox"/> A. Restore previous reduction or one-time funding	Why is the restoration of this reduction critical for the District at this time? What negative impact will result if this reduction is not restored? Please cite any relevant agency performance measures or other data that support your response.
<input type="checkbox"/> B. Increased cost to <u>maintain</u> existing activity	Why are costs increasing to maintain existing levels of service? What are the main cost drivers and what options have the agency already implemented or considered implementing to lower these costs? <i>Changes to the number of people served or the type of services provided should be categorized as a Type D request.</i>
<input checked="" type="checkbox"/> C. Operational improvement with a strong business case	How will this enhancement help the District save money in this or future fiscal years? How much will it save?
<input type="checkbox"/> D. Expand high-performing existing activity	Why is this program or activity considered to be high performing? How do the outputs or outcomes compare to those of similar programs within or outside of District government? Please cite any relevant agency performance measures or other data that support your response.
<input type="checkbox"/> E. Completely new activity with highly likely or proven positive outcomes	What will be the District's return on investment, as measured by how many and/or which District residents are served, or some other measure?

Responses to Questions*

While the District will not see any direct savings in cost, the implementation of a better, more stable and more secure interface platform will provide indirect savings – both the OCFO and OCTO will benefit from not having to disable the gateway, investigate data exchange interruptions to determine what transactions can be picked up and completed and which ones will need to be rerun, and then coordinate with one another in order to resume data exchanges.

Form 2 Detail: FY 2026 Enhancement Request
 FY 2026 Agency Budget Request

SECTION III. PERFORMANCE RATIONALE & IMPACT

Required for ALL requests

PERFORMANCE IMPACT

What data will the agency collect to understand the impact of this enhancement?*

Data may include measurements of the demand or need for programs over time, monitoring the quality and/or efficiency of programs, and/or assessing the impact of the enhancement on longer term goals. Please list specific data sources that will be collected and analyzed.

The OCFO will continue to monitor the health of the Oracle Platform and document any outages requiring the suspension of the gateway between the District and Oracle.

PERFORMANCE TEAM IS HERE TO HELP!

Need help thinking through this section or identifying data sources or performance measures? Reach out to your OBPM Performance Analyst or to Chief Performance Officer Lia Katz (lia.katz@dc.gov).

What challenges or risks does the agency anticipate related to this enhancement request? What mitigation or management strategies will the agency adopt to address those challenges?

The biggest risk will not be implementing a new solution for the communication needed between DIFS and PASS. Establishing a better performing platform will reduce the interruption of communication between the systems and increase the reliability of the data exchange.

Will any performance measures currently in the agency's performance plan be impacted by this enhancement? What new measures will be added to understand the impact of the enhancement?*

- If you are proposing a new metric, write "NEW" in the columns for FY 2024 and FY 2025.
- Identify the "measure type: will the metric measure quantity; quality; efficiency; outcome; context; or is a District wide indicator of environmental trends.
- Please provide the previous year's data and the current year's target for the metric. Please also provide the anticipated targets for next year in the case that (a) the enhancement is funded and (b) the enhancement is not funded.

Form 2 Detail: FY 2026 Enhancement Request
 FY 2026 Agency Budget Request



Performance Measure	New for FY26?	Measure Type	Which direction is desired?	FY 2024 Actual	FY 2025 Target	Anticipated FY 2026 Target	
						With enhancement funding	Without enhancement funding
[enter]	[Select...]	[Select...]	[enter]	[enter]	[enter]	[enter]	[enter]
[enter]	[Select...]	[Select...]	[enter]	[enter]	[enter]	[enter]	[enter]
[enter]	[Select...]	[Select...]	[enter]	[enter]	[enter]	[enter]	[enter]

SECTION IV. BUDGETING FOR RACIAL EQUITY

Required for ALL requests

Is one of the goals of this enhancement to reduce or eliminate a racial equity gap?*

 YES NO

Which of the four goals in the District's [Racial Equity Action Plan](#) (REAP) or your agency specific REAP does this enhancement request advance? Check all that apply.

- 1. Improving DC Government staff understanding and commitment to achieving racial equity (e.g., training, capacity building, or use of racial equity tools)
- 2. Reducing or eliminating a known racial and ethnic inequity (domains include housing, health, economic opportunity, safety, education, neighborhood life, and civic engagement)
- 3. Enhancing opportunities to meaningfully engage DC residents in decision-making processes and strengthening partnerships
- 4. Improving DC government ability to be an equitable employer and engage in racially equitable hiring, promotion, and retention practices (e.g., building pipelines with HBCU/HSI, staff development funds, or community of practice on hiring)

What racial inequity or REAP sub-goal(s) does this enhancement request address?*

For example, health disparity, educational gap, disproportionality in housing, bolstering existing community resources, etc. Please be as specific as possible. For REAP goals, please list the specific action (e.g. 1B, see District's REAP for supporting actions).

[Click or tap here to enter text.](#)

What is the rationale for addressing the inequity in this way and/or with this program?*

For example, is the enhancement in response to a legislative requirement or mandate, community engagement efforts, demographic data, or something else?

[Click or tap here to enter text.](#)

In what ways have you meaningfully involved internal and external stakeholders in the development of your agency's budget request, including staff and communities of color? See ORE's [Meaningful Community Engagement Guide](#).

[Click or tap here to enter text.](#)

If this budget enhancement could potentially cause unintended benefits or burdens, please detail what racial or ethnic groups might be positively or negatively impacted.* For example, the location for a new airport could disrupt traffic patterns and create noise and air pollution that impact residents in the immediate vicinity, which could worsen racial health inequities.

[Click or tap here to enter text.](#)

SECTION V. EVIDENCE-BASED BUDGETING

Required for Type D & E requests. Optional for Types A, B & C.

This section is required for all Type D and E enhancement requests that would expand existing activities or launch completely new activities. This section may be completed for Type A, B and C enhancement requests to be considered for an evidence rating.

If the activities described in this enhancement are successfully implemented, what outcome(s) will improve?* OBPM expects that it will be possible for agencies to identify for almost all enhancement requests a new performance measure (Section III of this form) that aligns with the outcome measures identified in the evidence provided. If this is not feasible, please explain below.

Click or tap here to enter text.

What evidence supports the likelihood that this enhancement will achieve the desired outcome?*

Please describe the quantitative studies or other measures that show the outcomes of similar efforts previously undertaken in the District or in other cities (see sidebar for what OBPM will look for to review enhancements as evidence-based or supported by preliminary evidence). Provide links to cite your sources, which may include formal evaluation studies, evidence standards, or evidence clearinghouses.

Click or tap here to enter text.

Which parts of your enhancement are identical to the model(s) the evidence comes from?*

As applicable, your answer should describe sameness in the target population, intervention, and availability of inputs/resources needed, etc.

Click or tap here to enter text.

Which parts of your enhancement are different from the model(s) evaluated in the studies linked?*

Explain why deviations are necessary for success in DC.

Click or tap here to enter text.

Are you building or planning to build evidence to support this enhancement using a formal program evaluation?*

YES NO

If yes, please describe or link below to the planned evaluation design, research question(s), and timeline for results.

Click or tap here to enter text.

THE LAB@DC TEAM IS HERE TO HELP!

Have questions about the evidence? Email the.lab@dc.gov (and CC your OBPM Budget Analyst). The Lab can pre-review evidence, brainstorm future evaluation ideas, offer suggestions on where to look for evidence, and help you think through the evidence you've found.

HELPFUL TIPS TO GET STARTED:

In general, evidence ratings follow the principles listed below; the quality of the evidence provided and how well it matches the enhancement may also affect the final evidence rating:

- Experimental studies (also called randomized evaluations or randomized control trials) that show that a program or intervention *caused* an outcome may receive a **STRONG/4-star** evidence rating
- Quasi-experimental studies that suggest that a program or intervention *caused* an outcome by comparing outcomes between the group receiving the enhancement and a very similar group that doesn't receive the enhancement may receive a **MODERATE/3-star** evidence rating
- Correlational studies with appropriate statistical controls may receive a **PROMISING/2-star** evidence rating
- Before-and-after comparison studies (also called pre-post comparison studies) may receive a **SOME/1-star** evidence rating

Consider the positive impact(s) this enhancement should have on District residents or government operations. These are the outcome(s) of the enhancement. Try searching [Google Scholar](#) or a similar database for relevant existing research. Government evidence clearinghouses (like [What Works Clearinghouse](#) for education and [CrimeSolutions](#) for public safety) are also good places to search according to specialized topics.

SECTION VI. PROJECT PLAN *Optional for All Requests*

This section is optional. However, it is recommended for Type D and E enhancement requests that would expand existing activities or launch completely new activities.

This project plan can be used to show how the agency will deliver the intended results before the end of the fiscal year. Complete as best you can, knowing the plan might evolve.

PROJECT OWNER

Who is the single person who will be most responsible for this initiative? If the project owner must be hired, specify who will own the project until that time.

NAME Click or tap here to enter text.
 TITLE Click or tap here to enter text.
 EMAIL Click or tap here to enter text.
 PHONE Click or tap here to enter text.

BUSINESS PARTNER COORDINATION

What other agencies or stakeholders would be critical to this project’s success, and what communication have you had with them?

Click or tap here to enter text.

PROJECT TIMELINE

Describe below anticipated implementation milestones by quarter to show how the agency will deliver the intended results. Please identify specific months or dates, if known.

PREPARATION FOR PROJECT LAUNCH (before start of fiscal year)	
FY 2025 Q4	[enter]
FISCAL YEAR STARTS, FUNDS DISBURSED	
FY 2026 Q1	[enter]
FY 2026 Q2	[enter]
FY 2026 Q3	[enter]
FY 2026 Q4	[enter]

Form 2 Detail: FY 2026 Enhancement Request

FY 2026 Agency Budget Request

Complete a separate Form 2 for each enhancement request. Agencies are limited to three Type D & E enhancement requests.

SECTION I. OVERVIEW Required for ALL requests

ENHANCEMENT TITLE* ENHANCEMENT PRIORITY*
Treasury Management System Support # OUT OF #

AGENCY* AGENCY CODE*
 Office of the Chief Financial Officer (OCFO) ATO

AGENCY POINT OF CONTACT* POINT OF CONTACT EMAIL*
 James Snight James.snight@dc.gov

REQUEST TYPE*
 Mark the one request type that best describes this enhancement. No type is preferred over any other, but the questions in **Section II: Rationale** differ by type.

A. Restore previous reduction or one-time funding } Complete Sections I-IV. Complete Section V to be considered for evidence rating.
 B. Increased cost to maintain existing activity
 C. Operational improvement with strong business case

 D. Expand high-performing existing activity } Complete Sections I-V.
 E. Completely new activity with highly likely or proven positive outcomes

FUNDING REQUEST*
 Enter amount of Local Funds requested and indicate whether funds are one-time or recurring.

FY 2026 PERSONAL SERVICES (PS)	FY 2026 NON-PERSONAL SERVICES (NPS)	FY 2026 TOTAL REQUEST AMOUNT
\$0.00	\$544,540.00	\$544,540.00

ONE-TIME
 PARTIALLY RECURRING
 RECURRING

FUTURE COSTS*
 If recurring, enter estimated costs over next four years.

TOTAL FY 2027	TOTAL FY 2028	TOTAL FY 2029
\$560,876.20	\$677,702.49	\$595,033.56

ENHANCEMENT SUMMARY*
 In your response:

- State the problem this enhancement is designed to address
- Describe what the enhancement is and/or how it will work
- Describe the impact the enhancement will have on the problem

The OCFO is in the process of awarding a new contract for Treasury Management services. We anticipate implementation of the Treasury Management System (TMS) to begin in FY25 and will need to fund annual license and maintenance costs from the operating budget in FY26. This system is used by OFT to manage banking accounts and investments.

Will legislative support be required to implement this enhancement?* YES NO
 If yes, please submit a proposed BSA subtitle using Attachment D.

AGENCIES: Use this form to provide details about enhancement requests in your agency's FY 2026 budget request.

REQUIRED SECTIONS

- Sections I-IV for ALL requests.
- Section V for Type D/E requests. Types A, B, and C can complete this section to be considered for an evidence rating.
- Section VII for Type F requests.
- Section VI optional for all requests.

You must also submit a completed Form 2 Summary spreadsheet, including spend plan details for each enhancement request.


IMPORTANT: Agencies are limited to three Type D & E enhancement requests for FY 2026. If more than three Type D & E enhancements are submitted, OBPM will only consider and analyze the highest ranked.

RACIAL EQUITY BUDGET TOOL (REBT)
 The Office of Racial Equity (ORE) has developed the Racial Equity Budget Tool (REBT) to guide agencies in assessing how their budgets benefit and/or negatively impact communities based on race, specifically Black,

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Form 2 Detail: FY 2026 Enhancement Request
 FY 2026 Agency Budget Request

SECTION II. RATIONALE *Required for ALL requests*

Has this enhancement request been submitted in past formulation cycles?  YES NO

If yes, in which fiscal years was it submitted? Mark all that apply.

FY 2025 FY 2024 FY 2023 FY 2022 FY 2021

What problem facing the District will this enhancement address and why does this problem exist?*
 Please provide as much detail as possible. Responses that identify and quantify specific problems will receive more favorable consideration.

The OCFO needs to replace its current Treasury Management System due to the expiring contract in order to continue managing bank accounts and investments.

How does this enhancement address this problem and its underlying causes?*
 Please provide as much detail as possible. Responses that clearly demonstrate how the proposed enhancement will address the underlying causes will receive more favorable consideration. Please describe any data the agency has collected and/or any analysis the agency has conducted to understand the problem and its potential solutions.

A new contract will be awarded and implemented starting in FY25. Annual licenses and maintenance costs will need to be funded from the operating budget starting with the exercise of option year one in FY26.

Is this enhancement meant to sustain a project initiated with non-local funding (e.g. ARPA, federal grants, SPRs)? YES NO

If yes, please provide a rationale for why these non-local funds are no longer available:
 Click or tap here to enter text.

How can this enhancement be scaled down to be accommodated within a constrained budget?*
 Scaling can occur in FY 2026 or the out-years and can be based on fewer residents served, scaled back staffing, adjusted implementation timeline, etc. Please add a new row for each scaled down scenario and rank the scaled down options in order of agency preference.
 Use the text box below the table to provide additional detail. If the enhancement cannot be scaled down, please indicate so in the textbox.

RANKING	Describe each proposed approach to scale down the enhancement request and explain the expected impact with each scenario	FY 2026	FY 2027	FY 2028	FY 2029
1	[scenario title]: [description and expected impact]	[enter \$]	[enter \$]	[enter \$]	[enter \$]
2	[scenario title]: [description and expected impact]	[enter \$]	[enter \$]	[enter \$]	[enter \$]

With the contract not yet being awarded, we are unable to identify any options for scaling back until the replacement system is implemented and functional.

SECTION II. RATIONALE (continued) *Required for ALL requests*

QUESTIONS SPECIFIC TO ENHANCEMENT TYPE*

Mark the appropriate enhancement type and use the space below the table to answer the questions for that enhancement type.

IF YOUR ENHANCEMENT TYPE IS...	THEN ANSWER THESE QUESTIONS...
<input type="checkbox"/> A. Restore previous reduction or one-time funding	Why is the restoration of this reduction critical for the District at this time? What negative impact will result if this reduction is not restored? Please cite any relevant agency performance measures or other data that support your response.
<input checked="" type="checkbox"/> B. Increased cost to <u>maintain</u> existing activity	Why are costs increasing to maintain existing levels of service? What are the main cost drivers and what options have the agency already implemented or considered implementing to lower these costs? <i>Changes to the number of people served or the type of services provided should be categorized as a Type D request.</i>
<input type="checkbox"/> C. Operational improvement with a strong business case	How will this enhancement help the District save money in this or future fiscal years? How much will it save?
<input type="checkbox"/> D. Expand high-performing existing activity	Why is this program or activity considered to be high performing? How do the outputs or outcomes compare to those of similar programs within or outside of District government? Please cite any relevant agency performance measures or other data that support your response.
<input type="checkbox"/> E. Completely new activity with highly likely or proven positive outcomes	What will be the District's return on investment, as measured by how many and/or which District residents are served, or some other measure?

Responses to Questions*

The current interim system has been funded through the DIFS capital project and will move to operational support in FY26. While there is no expected increase in costs for the services, this will be the first time the system's implementation will be completed with operating funds needed to maintain support.

Form 2 Detail: FY 2026 Enhancement Request
 FY 2026 Agency Budget Request

SECTION III. PERFORMANCE RATIONALE & IMPACT

Required for ALL requests

PERFORMANCE IMPACT

What data will the agency collect to understand the impact of this enhancement?*

Data may include measurements of the demand or need for programs over time, monitoring the quality and/or efficiency of programs, and/or assessing the impact of the enhancement on longer term goals. Please list specific data sources that will be collected and analyzed.

This replacement system will be used primarily by OFT and the team members using the new system will be surveyed to determine whether the replacement system better meets its operational needs.

PERFORMANCE TEAM IS HERE TO HELP!

Need help thinking through this section or identifying data sources or performance measures? Reach out to your OBPM Performance Analyst or to Chief Performance Officer Lia Katz (lia.katz@dc.gov).

What challenges or risks does the agency anticipate related to this enhancement request? What mitigation or management strategies will the agency adopt to address those challenges?

Replacing a system that users are familiar with will require an adjustment period as system users become familiar with the new system. Training materials will be provided to assist in that transition – although the primary functions exercised in the current system are requirements for the new system, the look and feel may be slightly different.

Will any performance measures currently in the agency's performance plan be impacted by this enhancement? What new measures will be added to understand the impact of the enhancement?*

- If you are proposing a new metric, write “NEW” in the columns for FY 2024 and FY 2025.
- Identify the “measure type: will the metric measure quantity; quality; efficiency; outcome; context; or is a District wide indicator of environmental trends.
- Please provide the previous year’s data and the current year’s target for the metric. Please also provide the anticipated targets for next year in the case that (a) the enhancement is funded and (b) the enhancement is not funded.

Form 2 Detail: FY 2026 Enhancement Request
 FY 2026 Agency Budget Request



Performance Measure	New for FY26?	Measure Type	Which direction is desired?	FY 2024 Actual	FY 2025 Target	Anticipated FY 2026 Target	
						With enhancement funding	Without enhancement funding
[enter]	[Select...]	[Select...]	[enter]	[enter]	[enter]	[enter]	[enter]
[enter]	[Select...]	[Select...]	[enter]	[enter]	[enter]	[enter]	[enter]
[enter]	[Select...]	[Select...]	[enter]	[enter]	[enter]	[enter]	[enter]

SECTION IV. BUDGETING FOR RACIAL EQUITY

Required for ALL requests

Is one of the goals of this enhancement to reduce or eliminate a racial equity gap?*

 YES NO

Which of the four goals in the District's [Racial Equity Action Plan](#) (REAP) or your agency specific REAP does this enhancement request advance? Check all that apply.

- 1. Improving DC Government staff understanding and commitment to achieving racial equity (e.g., training, capacity building, or use of racial equity tools)
- 2. Reducing or eliminating a known racial and ethnic inequity (domains include housing, health, economic opportunity, safety, education, neighborhood life, and civic engagement)
- 3. Enhancing opportunities to meaningfully engage DC residents in decision-making processes and strengthening partnerships
- 4. Improving DC government ability to be an equitable employer and engage in racially equitable hiring, promotion, and retention practices (e.g., building pipelines with HBCU/HSI, staff development funds, or community of practice on hiring)

What racial inequity or REAP sub-goal(s) does this enhancement request address?*

For example, health disparity, educational gap, disproportionality in housing, bolstering existing community resources, etc. Please be as specific as possible. For REAP goals, please list the specific action (e.g. 1B, see District's REAP for supporting actions).

[Click or tap here to enter text.](#)

What is the rationale for addressing the inequity in this way and/or with this program?*

For example, is the enhancement in response to a legislative requirement or mandate, community engagement efforts, demographic data, or something else?

[Click or tap here to enter text.](#)

In what ways have you meaningfully involved internal and external stakeholders in the development of your agency's budget request, including staff and communities of color? See ORE's [Meaningful Community Engagement Guide](#).

[Click or tap here to enter text.](#)

If this budget enhancement could potentially cause unintended benefits or burdens, please detail what racial or ethnic groups might be positively or negatively impacted.* For example, the location for a new airport could disrupt traffic patterns and create noise and air pollution that impact residents in the immediate vicinity, which could worsen racial health inequities.

[Click or tap here to enter text.](#)

SECTION V. EVIDENCE-BASED BUDGETING

Required for Type D & E requests. Optional for Types A, B & C.

This section is required for all Type D and E enhancement requests that would expand existing activities or launch completely new activities. This section may be completed for Type A, B and C enhancement requests to be considered for an evidence rating.

If the activities described in this enhancement are successfully implemented, what outcome(s) will improve?* OBPM expects that it will be possible for agencies to identify for almost all enhancement requests a new performance measure (Section III of this form) that aligns with the outcome measures identified in the evidence provided. If this is not feasible, please explain below.

Click or tap here to enter text.

What evidence supports the likelihood that this enhancement will achieve the desired outcome?*

Please describe the quantitative studies or other measures that show the outcomes of similar efforts previously undertaken in the District or in other cities (see sidebar for what OBPM will look for to review enhancements as evidence-based or supported by preliminary evidence). Provide links to cite your sources, which may include formal evaluation studies, evidence standards, or evidence clearinghouses.

Click or tap here to enter text.

Which parts of your enhancement are identical to the model(s) the evidence comes from?*

As applicable, your answer should describe sameness in the target population, intervention, and availability of inputs/resources needed, etc.

Click or tap here to enter text.

Which parts of your enhancement are different from the model(s) evaluated in the studies linked?*

Explain why deviations are necessary for success in DC.

Click or tap here to enter text.

Are you building or planning to build evidence to support this enhancement using a formal program evaluation?*

YES NO

If yes, please describe or link below to the planned evaluation design, research question(s), and timeline for results.

Click or tap here to enter text.

THE LAB@DC TEAM IS HERE TO HELP!

Have questions about the evidence? Email the.lab@dc.gov (and CC your OBPM Budget Analyst). The Lab can pre-review evidence, brainstorm future evaluation ideas, offer suggestions on where to look for evidence, and help you think through the evidence you've found.

HELPFUL TIPS TO GET STARTED:

In general, evidence ratings follow the principles listed below; the quality of the evidence provided and how well it matches the enhancement may also affect the final evidence rating:

- Experimental studies (also called randomized evaluations or randomized control trials) that show that a program or intervention *caused* an outcome may receive a **STRONG/4-star** evidence rating
- Quasi-experimental studies that suggest that a program or intervention *caused* an outcome by comparing outcomes between the group receiving the enhancement and a very similar group that doesn't receive the enhancement may receive a **MODERATE/3-star** evidence rating
- Correlational studies with appropriate statistical controls may receive a **PROMISING/2-star** evidence rating
- Before-and-after comparison studies (also called pre-post comparison studies) may receive a **SOME/1-star** evidence rating

Consider the positive impact(s) this enhancement should have on District residents or government operations. These are the outcome(s) of the enhancement. Try searching [Google Scholar](#) or a similar database for relevant existing research. Government evidence clearinghouses (like [What Works Clearinghouse](#) for education and [CrimeSolutions](#) for public safety) are also good places to search according to specialized topics.

SECTION VI. PROJECT PLAN *Optional for All Requests*

This section is optional. However, it is recommended for Type D and E enhancement requests that would expand existing activities or launch completely new activities.

This project plan can be used to show how the agency will deliver the intended results before the end of the fiscal year. Complete as best you can, knowing the plan might evolve.

PROJECT OWNER

Who is the single person who will be most responsible for this initiative? If the project owner must be hired, specify who will own the project until that time.

NAME Click or tap here to enter text.
 TITLE Click or tap here to enter text.
 EMAIL Click or tap here to enter text.
 PHONE Click or tap here to enter text.

BUSINESS PARTNER COORDINATION

What other agencies or stakeholders would be critical to this project’s success, and what communication have you had with them?

Click or tap here to enter text.

PROJECT TIMELINE

Describe below anticipated implementation milestones by quarter to show how the agency will deliver the intended results. Please identify specific months or dates, if known.

PREPARATION FOR PROJECT LAUNCH (before start of fiscal year)	
FY 2025 Q4	[enter]
FISCAL YEAR STARTS, FUNDS DISBURSED	
FY 2026 Q1	[enter]
FY 2026 Q2	[enter]
FY 2026 Q3	[enter]
FY 2026 Q4	[enter]

Form 2 Detail: FY 2026 Enhancement Request

FY 2026 Agency Budget Request



Complete a separate Form 2 for each enhancement request. Agencies are limited to three Type D & E enhancement requests.

SECTION I. OVERVIEW Required for ALL requests

ENHANCEMENT TITLE* ENHANCEMENT PRIORITY*
Service Tracking System Replacement # OUT OF #

AGENCY* AGENCY CODE*
 Office of the Chief Financial Officer (OCFO) ATO

AGENCY POINT OF CONTACT* POINT OF CONTACT EMAIL*
 James Snight James.snight@dc.gov

- REQUEST TYPE***
 Mark the one request type that best describes this enhancement. No type is preferred over any other, but the questions in **Section II: Rationale** differ by type.
- A. Restore previous reduction or one-time funding } Complete Sections I-IV.
 - B. Increased cost to maintain existing activity } Complete Section V to be considered for evidence rating.
 - C. Operational improvement with strong business case
 - D. Expand high-performing existing activity } Complete Sections I-V.
 - E. Completely new activity with highly likely or proven positive outcomes

FUNDING REQUEST*
 Enter amount of Local Funds requested and indicate whether funds are one-time or recurring.

FY 2026 PERSONAL SERVICES (PS)	FY 2026 NON-PERSONAL SERVICES (NPS)	FY 2026 TOTAL REQUEST AMOUNT
\$0.00	\$664,120.00	\$664,120.00

ONE-TIME PARTIALLY RECURRING RECURRING

FUTURE COSTS*
 If recurring, enter estimated costs over next four years.

TOTAL FY 2027	TOTAL FY 2028	TOTAL FY 2029
\$685,043.60	\$704,564.91	\$721,701.86

- ENHANCEMENT SUMMARY***
 In your response:
- State the problem this enhancement is designed to address
 - Describe what the enhancement is and/or how it will work
 - Describe the impact the enhancement will have on the problem

The current contract for our service request tracking system expires in the spring of 2025 and there is a RFP in process to replace it. We are anticipating an award before the end of FY25 and would expect implementation to be completed in early FY26 requiring the exercise of OY1 to be an operating expense in FY26. The IGE for the replacement is \$1M. Subtracting the cost of the expiring system (\$335,880) requires an increase in operating funds of \$664,120. The new system will have additional workflow capabilities allowing us to improve our tracking processes and could result in additional savings if the workflows can cover other tracking functions and allow us to retire other existing systems.

AGENCIES: Use this form to provide details about enhancement requests in your agency's FY 2026 budget request.

REQUIRED SECTIONS

- Sections I-IV for ALL requests.
- Section V for Type D/E requests. Types A, B, and C can complete this section to be considered for an evidence rating.
- Section VII for Type F requests.
- Section VI optional for all requests.

You must also submit a completed Form 2 Summary spreadsheet, including spend plan details for each enhancement request.

IMPORTANT: Agencies are limited to three Type D & E enhancement requests for FY 2026. If more than three Type D & E enhancements are submitted, OBPM will only consider and analyze the highest ranked.

RACIAL EQUITY BUDGET TOOL (REBT)
 The Office of Racial Equity (ORE) has developed the Racial Equity Budget Tool (REBT) to guide agencies in assessing how their budgets benefit and/or negatively impact communities based on race, specifically Black,

EDITING RESTRICTIONS: This form uses editing restrictions to ensure consistent displays of information. If needed, the restrictions can be disabled by going to the Review tab at the top of the window, clicking on Protect, then Restrict Editing, and clicking Stop Protection. If prompted for a password, click OK.

Will legislative support be required to implement this enhancement?* YES NO
 If yes, please submit a proposed BSA subtitle using Attachment D.

SECTION II. RATIONALE *Required for ALL requests*

Has this enhancement request been submitted in past formulation cycles?* YES NO
 If yes, in which fiscal years was it submitted? Mark all that apply.
 FY 2025 FY 2024 FY 2023 FY 2022 FY 2021

What problem facing the District will this enhancement address and why does this problem exist?*
 Please provide as much detail as possible. Responses that identify and quantify specific problems will receive more favorable consideration.

Multiple internal groups track problems and requests for service in our current Zendesk system. The contract for using the system has reached its end-of-life and we are working to issue a RFP to replace the system. The system allows us to track the progress of requests for service/action and to report on status to management.

How does this enhancement address this problem and its underlying causes?*
 Please provide as much detail as possible. Responses that clearly demonstrate how the proposed enhancement will address the underlying causes will receive more favorable consideration. Please describe any data the agency has collected and/or any analysis the agency has conducted to understand the problem and its potential solutions.

Replacing the existing system with a more robust tracking system will allow us to integrate workflows more efficiently, reduce onboarding and offboarding activities, improve the status monitoring of service requests, and provide enhanced reporting on the nature and timeframe of both pending and completed service requests to optimize resource use.

Is this enhancement meant to sustain a project initiated with non-local funding (e.g. ARPA, federal grants, SPRs)? YES NO
 If yes, please provide a rationale for why these non-local funds are no longer available:
 Click or tap here to enter text.

How can this enhancement be scaled down to be accommodated within a constrained budget?*
 Scaling can occur in FY 2026 or the out-years and can be based on fewer residents served, scaled back staffing, adjusted implementation timeline, etc. Please add a new row for each scaled down scenario and rank the scaled down options in order of agency preference.

Use the text box below the table to provide additional detail. If the enhancement cannot be scaled down, please indicate so in the textbox.

RANKING	Describe each proposed approach to scale down the enhancement request and explain the expected impact with each scenario	FY 2026	FY 2027	FY 2028	FY 2029
1	[scenario title]: [description and expected impact]	[enter \$]	[enter \$]	[enter \$]	[enter \$]
2	[scenario title]: [description and expected impact]	[enter \$]	[enter \$]	[enter \$]	[enter \$]

The system tracks essential business functions for the entire OCFO and cannot be scaled back. On the positive side, if the replacement system has the capabilities desired we may be able to retire other systems and obtain savings for future years.

SECTION II. RATIONALE (continued) *Required for ALL requests*

QUESTIONS SPECIFIC TO ENHANCEMENT TYPE*

Mark the appropriate enhancement type and use the space below the table to answer the questions for that enhancement type.

IF YOUR ENHANCEMENT TYPE IS...	THEN ANSWER THESE QUESTIONS...
<input type="checkbox"/> A. Restore previous reduction or one-time funding	Why is the restoration of this reduction critical for the District at this time? What negative impact will result if this reduction is not restored? Please cite any relevant agency performance measures or other data that support your response.
<input type="checkbox"/> B. Increased cost to <u>maintain</u> existing activity	Why are costs increasing to maintain existing levels of service? What are the main cost drivers and what options have the agency already implemented or considered implementing to lower these costs? <i>Changes to the number of people served or the type of services provided should be categorized as a Type D request.</i>
<input checked="" type="checkbox"/> C. Operational improvement with a strong business case	How will this enhancement help the District save money in this or future fiscal years? How much will it save?
<input type="checkbox"/> D. Expand high-performing existing activity	Why is this program or activity considered to be high performing? How do the outputs or outcomes compare to those of similar programs within or outside of District government? Please cite any relevant agency performance measures or other data that support your response.
<input type="checkbox"/> E. Completely new activity with highly likely or proven positive outcomes	What will be the District's return on investment, as measured by how many and/or which District residents are served, or some other measure?

Responses to Questions*

The anticipated cost of operating the replacement system is higher than the current system but will provide better workflows and allow us to track status better. Once the core functions are implemented and working we believe we may be able to retire an asset tracking system, which would save us roughly \$100K in FY27.

Form 2 Detail: FY 2026 Enhancement Request
 FY 2026 Agency Budget Request

SECTION III. PERFORMANCE RATIONALE & IMPACT *Required for ALL requests*

PERFORMANCE IMPACT

What data will the agency collect to understand the impact of this enhancement?*

Data may include measurements of the demand or need for programs over time, monitoring the quality and/or efficiency of programs, and/or assessing the impact of the enhancement on longer term goals. Please list specific data sources that will be collected and analyzed.

PERFORMANCE TEAM IS HERE TO HELP!
 Need help thinking through this section or identifying data sources or performance measures? Reach out to your OBPM Performance Analyst or to Chief Performance Officer Lia Katz (lia.katz@dc.gov).

The current system tracks requests received, time to resolve, final status and allows requesters to rate their satisfaction with the agent’s performance. The replacement system is expected to have the same or better capabilities.

What challenges or risks does the agency anticipate related to this enhancement request? What mitigation or management strategies will the agency adopt to address those challenges?

Transitioning to a new system always poses challenges as users learn how to navigate the new system. The organization expects to prepare training materials to introduce the new system once implemented that will provide users/requesters with examples of how to submit current requests using the new system prompts and screens.

Will any performance measures currently in the agency's performance plan be impacted by this enhancement? What new measures will be added to understand the impact of the enhancement?*

- If you are proposing a new metric, write “NEW” in the columns for FY 2024 and FY 2025.
- Identify the “measure type: will the metric measure quantity; quality; efficiency; outcome; context; or is a District wide indicator of environmental trends.
- Please provide the previous year’s data and the current year’s target for the metric. Please also provide the anticipated targets for next year in the case that (a) the enhancement is funded and (b) the enhancement is not funded.

Form 2 Detail: FY 2026 Enhancement Request
 FY 2026 Agency Budget Request



Performance Measure	New for FY26?	Measure Type	Which direction is desired?	FY 2024 Actual	FY 2025 Target	Anticipated FY 2026 Target	
						With enhancement funding	Without enhancement funding
[enter]	[Select...]	[Select...]	[enter]	[enter]	[enter]	[enter]	[enter]
[enter]	[Select...]	[Select...]	[enter]	[enter]	[enter]	[enter]	[enter]
[enter]	[Select...]	[Select...]	[enter]	[enter]	[enter]	[enter]	[enter]

SECTION IV. BUDGETING FOR RACIAL EQUITY

Required for ALL requests

Is one of the goals of this enhancement to reduce or eliminate a racial equity gap?*

 YES NO

Which of the four goals in the District's [Racial Equity Action Plan](#) (REAP) or your agency specific REAP does this enhancement request advance?*. Check all that apply.

- 1. Improving DC Government staff understanding and commitment to achieving racial equity (e.g., training, capacity building, or use of racial equity tools)
- 2. Reducing or eliminating a known racial and ethnic inequity (domains include housing, health, economic opportunity, safety, education, neighborhood life, and civic engagement)
- 3. Enhancing opportunities to meaningfully engage DC residents in decision-making processes and strengthening partnerships
- 4. Improving DC government ability to be an equitable employer and engage in racially equitable hiring, promotion, and retention practices (e.g., building pipelines with HBCU/HSI, staff development funds, or community of practice on hiring)

What racial inequity or REAP sub-goal(s) does this enhancement request address?*

For example, health disparity, educational gap, disproportionality in housing, bolstering existing community resources, etc. Please be as specific as possible. For REAP goals, please list the specific action (e.g. 1B, see District's REAP for supporting actions).

[Click or tap here to enter text.](#)

What is the rationale for addressing the inequity in this way and/or with this program?*

For example, is the enhancement in response to a legislative requirement or mandate, community engagement efforts, demographic data, or something else?

[Click or tap here to enter text.](#)

In what ways have you meaningfully involved internal and external stakeholders in the development of your agency's budget request, including staff and communities of color?*. See ORE's [Meaningful Community Engagement Guide](#).

[Click or tap here to enter text.](#)

If this budget enhancement could potentially cause unintended benefits or burdens, please detail what racial or ethnic groups might be positively or negatively impacted.* For example, the location for a new airport could disrupt traffic patterns and create noise and air pollution that impact residents in the immediate vicinity, which could worsen racial health inequities.

[Click or tap here to enter text.](#)

SECTION V. EVIDENCE-BASED BUDGETING

Required for Type D & E requests. Optional for Types A, B & C.

This section is required for all Type D and E enhancement requests that would expand existing activities or launch completely new activities. This section may be completed for Type A, B and C enhancement requests to be considered for an evidence rating.

If the activities described in this enhancement are successfully implemented, what outcome(s) will improve?* OBPM expects that it will be possible for agencies to identify for almost all enhancement requests a new performance measure (Section III of this form) that aligns with the outcome measures identified in the evidence provided. If this is not feasible, please explain below.

Click or tap here to enter text.

What evidence supports the likelihood that this enhancement will achieve the desired outcome?*

Please describe the quantitative studies or other measures that show the outcomes of similar efforts previously undertaken in the District or in other cities (see sidebar for what OBPM will look for to review enhancements as evidence-based or supported by preliminary evidence). Provide links to cite your sources, which may include formal evaluation studies, evidence standards, or evidence clearinghouses.

Click or tap here to enter text.

Which parts of your enhancement are identical to the model(s) the evidence comes from?*

As applicable, your answer should describe sameness in the target population, intervention, and availability of inputs/resources needed, etc.

Click or tap here to enter text.

Which parts of your enhancement are different from the model(s) evaluated in the studies linked?*

Explain why deviations are necessary for success in DC.

Click or tap here to enter text.

Are you building or planning to build evidence to support this enhancement using a formal program evaluation?*

YES NO

If yes, please describe or link below to the planned evaluation design, research question(s), and timeline for results.

Click or tap here to enter text.

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Have questions about the evidence? Email the.lab@dc.gov (and CC your OBPM Budget Analyst). The Lab can pre-review evidence, brainstorm future evaluation ideas, offer suggestions on where to look for evidence, and help you think through the evidence you've found.

HELPFUL TIPS TO GET STARTED:

In general, evidence ratings follow the principles listed below; the quality of the evidence provided and how well it matches the enhancement may also affect the final evidence rating:

- Experimental studies (also called randomized evaluations or randomized control trials) that show that a program or intervention *caused* an outcome may receive a **STRONG/4-star** evidence rating
- Quasi-experimental studies that suggest that a program or intervention *caused* an outcome by comparing outcomes between the group receiving the enhancement and a very similar group that doesn't receive the enhancement may receive a **MODERATE/3-star** evidence rating
- Correlational studies with appropriate statistical controls may receive a **PROMISING/2-star** evidence rating
- Before-and-after comparison studies (also called pre-post comparison studies) may receive a **SOME/1-star** evidence rating

Consider the positive impact(s) this enhancement should have on District residents or government operations. These are the outcome(s) of the enhancement. Try searching [Google Scholar](#) or a similar database for relevant existing research. Government evidence clearinghouses (like [What Works Clearinghouse](#) for education and [CrimeSolutions](#) for public safety) are also good places to search according to specialized topics.

SECTION VI. PROJECT PLAN *Optional for All Requests*

This section is optional. However, it is recommended for Type D and E enhancement requests that would expand existing activities or launch completely new activities.

This project plan can be used to show how the agency will deliver the intended results before the end of the fiscal year. Complete as best you can, knowing the plan might evolve.

PROJECT OWNER

Who is the single person who will be most responsible for this initiative? If the project owner must be hired, specify who will own the project until that time.

NAME Click or tap here to enter text.
 TITLE Click or tap here to enter text.
 EMAIL Click or tap here to enter text.
 PHONE Click or tap here to enter text.

BUSINESS PARTNER COORDINATION

What other agencies or stakeholders would be critical to this project’s success, and what communication have you had with them?

Click or tap here to enter text.

PROJECT TIMELINE

Describe below anticipated implementation milestones by quarter to show how the agency will deliver the intended results. Please identify specific months or dates, if known.

PREPARATION FOR PROJECT LAUNCH (before start of fiscal year)	
FY 2025 Q4	[enter]
FISCAL YEAR STARTS, FUNDS DISBURSED	
FY 2026 Q1	[enter]
FY 2026 Q2	[enter]
FY 2026 Q3	[enter]
FY 2026 Q4	[enter]

FY 2026 PROGRAM ENHANCEMENT - FORM B
Agency Program Enhancement Request Details

Agency Code: AT0
Agency name: Office of the Chief Financial Officer
Enhancement title: Credit Card Levy for Trust Fund Taxes (1099-k Data)

Index/PCA:
Object Class:
Total Amount of local funds: \$126,900 (includes fringes)
FTEs: 1 FTE

Is this enhancement a one-time cost? No, there is not an additional cost. OTR already receives the 1099-K data
Agency point of contact: Radee Skipworth

Problem Statement:

The most egregious non-compliance for state/local taxes is the failure to remit collected sales taxes or income tax withholding (“trust fund” taxes). The imposition of levying the credit card processors provides an important new enforcement tool to intercept funds for taxes owed before the delinquent taxpayer receives their funds disbursement from the credit card payment companies.

Proposed Solution:

Implement a program to administratively levy the credit card receipts that a delinquent District of Columbia business taxpayer receives from its credit card receipts payment processors. The purpose of this initiative is to begin levying the credit card payments that a delinquent business taxpayer receives from payment processors. This proposal is limited to business taxpayers who are delinquent on Trust Fund taxes.

Estimated Additional Revenues Attributed to this Proposal (\$ millions): \$1 million+ annually

What do we do today? Today OTR only levies the wages of employees and the bank accounts of businesses that owe delinquent taxes.

Why is this needed? The most egregious non-compliance for state/local taxes is the failure to remit collected sales taxes or income tax withholding (“trust fund” taxes). The imposition of a credit card levy provides an important new enforcement tool to intercept the taxes owed from the sales made by tax delinquents prior to their receiving the funds from the credit card payment companies. Many businesses in the District receive payment for goods or services almost exclusively via electronic methods.

What will we do with the new law? We will utilize the recently obtained Credit Card (3rd party) payment processor information returns (1099-Ks) to identify payment

processors. Then OTR will levy the payment stream to the taxpayer for delinquent trust fund taxes.

Example: ABC LLC owes \$7,200 in liened sales taxes. Unfortunately, no bank account information is available. However, we are aware that ABC transacts most of its business through credit card payments, and we have information regarding their credit card payment processor from the 1099-K data. Collection is initiated by levying the stream of payments from the credit card payment processor to ABC LLC.

Other States: Other states, such as Illinois and North Carolina, have successfully implemented this type of levy with positive results. The IRS has also recently begun trying to levy these merchant accounts.

Performance Measures:

CEA will use New Collection cases, Inactive case staging and the Garnishment report to calculate collections remitted and identify potential taxpayers for the program.

FY 2024 PROGRAM ENHANCEMENT - FORM B
Agency Program Enhancement Request Details

Agency Code: AT0
Agency name: Office of the Chief Financial Officer
Enhancement title: **Personal Property Tax – Discovery Enhancement**

Index/PCA:
Object Class:
Total Amount of local funds:
FTEs: 1 FTE

Is this enhancement a one-time cost? No additional funding required, just TSG support
Agency point of contact: Keith J. Richardson

Problem Statement:

Performing yearly reconciliations of Personal Property Tax (PPT) schedules in order to find errors is a very cumbersome and labor-intensive task since it requires a review of hundreds to thousands of individual assets

Proposed Solution:

OTR's Modernized Integrated Tax System (M ITS) is now able to digitally capture all of the accompanying tax schedules related to DC Personal Property Tax forms (FP-31). With Schedules A-1, A-2, A-3, B, C, D-1 and D-2 now being fully captured in MITS, the PPT Discovery Module can be enhanced to perform comparisons across schedules and across tax years. Performing these comparisons systematically will be far more efficient than the best manual processes.

This enhancement to the current Discovery Module will produce additional Audit leads.

Other Benefits:

In addition to ensuring that the proper amount of tax is received by the District, the District's taxpayers will be better educated and more likely to be more compliant going forward.

Performance Measures:

The success of this revenue initiative will be measured based on the quality and substance of the audit leads produced. This revenue initiative is estimated to generate an additional \$12.5M over the span of FY26-FY29.

FY26	\$2.5M	FY27	\$3M	FY28	\$3.5M	FY29	\$3.5M
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Status of FY 26 OCFO Agency AT0 Budget Enhancements

1. DIFS – Operating Impact of Capital Project (OIC) - EPM Budget FTE Support - \$943,714, 5 FTEs

Purpose: Ongoing FTE Support for the DIFS EPM -Budget component including managing all Level 1 user problem tickets related to DIFS EPM, training, and user support featuring expertise from the budget operations perspective

Status: Three of the five FTEs are filled: Director, Budget System Operations; Manager, Budget System Operations; Advisor, Budget System Operations. OBP is currently in the recruitment process for the Sr Analyst & EPM Advisor roles. The Sr. Analyst candidate was selected but declined role. Targeting completion of interviews & candidate selection by end February. EPM Advisor interviews are currently in progress. The new staff are providing needed user support as planned. The duties of the positions still vacant are being met with term employees.

2. DIFS/OIC - EPM IT Technical Support -\$1,215,962, 2 FTEs

Purpose: Ongoing FTE and Contractor Technical Support including maintenance & operations of EPM including specialized expertise in Oracle and related software used in DIFS EPM Budget Component

Status: Working with HR on employee positions to be posted for hire. In the meantime, we continue to engage contractors for the positions with the goal of transitioning the work from the contractors to the employees once they are onboard.

3. OIC DIFS Licenses - \$977,512

Purpose: Transition of DIFS licenses related to the budget component from capital to operating budget support

Status: Additional funding covering transition of licensing from capital to operating takes effect when we exercise the next option year for licenses in May 2026.

4. OIC - DIFS Automated Testing as a Service - \$878,040

Purpose: Implementation of the Automated Testing as a Service project occurs in FY25. Will need to pay for annual licenses and services out of operating budget in FY26.

Status: ATaaS funding has been used to cover the services beginning 01-OCT-2025/start of FY26. Next option year to be exercised starting in late April 2026.

5. OIC - Treasury Management System (TMS) Support - \$544,440

Purpose: With the pending replacement of the Kyriba TMS in FY25, licensing costs and support services will need to come out of operating budget in FY26.

Status: Contract was re-awarded to Kyriba in FY25. We will be exercising option year 1 of the new maintenance contract in January 2026 using this funding.

6. OTR Compliance Initiatives - \$306,092, 2 FTEs

Purpose: Implement two new compliance actions: 1) administratively levy the credit card receipts that a delinquent District business taxpayer receives from its credit card receipt payment processors, and 2) utilize the MITS automated capacity to dramatically expand the volume of Personal Property Tax audit leads.

Status: Planning and preparing the administrative processes needed for these efforts while recruiting for the new positions.

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Strategic Initiative	Actions Taken in FY 2025	Actions Planned/Scheduled for FY 2026
<p>Continuous improvement of Modernized Integrated Tax System (MITS)</p>	<p>The Core21 upgrade allowed MITS to move from the FAST private cloud to Amazon Web Services (AWS) Cloud at no additional hosting cost. The project began in January 2025 and was completed in July 2025. As part of this migration, the project team worked with OCTO to set up AWS Direct Connect for secure connectivity and a Key Management System for data protection. This migration significantly improved the robustness and reliability of the MITS application, enhancing both Recovery Point Objective (RPO) and Recovery Time Objective (RTO). These improvements were successfully validated during a Disaster Recovery exercise on November 7, 2025. To ensure continuous improvement, we implemented two service packs:</p> <ul style="list-style-type: none"> • S21F (May 16, 2025) – Enhanced security, accessibility, and core product features. • S21H (November 14, 2025) – Added more security improvements and new features. 	<p>Migrating to AWS enables us to transition to a PostgreSQL database, which will significantly reduce MITS hosting costs—saving millions of dollars over the life of the contract. In addition to cost savings, PostgreSQL is expected to deliver improved performance and reliability.</p> <p>We also plan to upgrade from .NET 8 to .NET 10 (including a service pack) ahead of Microsoft’s end-of-support timeline and migrate to Visual Studio 2026 to ensure continued security, compatibility, and access to the latest development tools.</p> <p>Beyond infrastructure improvements, we will continue making efforts to enhance the usability and accessibility of the many web requests we manage. Additionally, we plan to engage a vendor to review these forms and provide recommendations to improve both compliance and our commitment to accessibility.</p>
	<p>User Experience Enhancements</p> <ul style="list-style-type: none"> • Faster and safer logins: We integrated MITS with Azure Entra, making logins quicker and more secure. We also improved taxpayer login by introducing SMS verification and promoting Passkeys for better security. • Improved tax form usability: We redesigned and enhanced the accessibility and usability of tax form filings on mytax.dc.gov, working closely with business administration teams. 	

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<p>Implement Telephony System 2.0 and integrate Telephony System with a Customer Relations Management System for all areas of the OCFO and a new telephone system in the Office</p>	<p>A cloud solution contract was successfully procured through cooperative procurement process on July 17th, 2025. Utilizing the Cooperative procurement and Migrator accelerator program has helped District find a cost effective and robust solution.</p> <p>The Office of the Chief Financial Officer (OCFO) successfully launched a modern, cloud-based contact center solution leveraging Amazon Connect for Central Collection unit, Unclaimed Property unit and OCFO IT serve Desk. This foundational deployment delivered a scalable platform designed to meet current needs and support future enhancements. Key achievements include:</p> <ul style="list-style-type: none"> • Designed, built, and deployed a fully functional Amazon Connect instance tailored to OCFO requirements. • AWS Environments Established Provisioned and configured three distinct environments—Development, Sandbox, and Production—to support testing, training, and live operations. • Intelligent Contact Center Capabilities Delivered Implemented core features including: <ul style="list-style-type: none"> ○ Intelligent call routing ○ Interactive Voice Response (IVR) ○ User-friendly agent interfaces ○ Essential reporting and analytics • Training and Documentation Completed Developed comprehensive training materials and conducted sessions for agents and supervisors to ensure smooth adoption. 	<p>OCFO is on track to retire the on-premises telephony system and deploy new capabilities to additional call centers by April 2026.</p> <p>These call centers include:</p> <ul style="list-style-type: none"> • OTR Customer Service • OTR E-Services • OTR Audit and Criminal Investigations (Return Integrity Unit, Fraud Hotline) • OTR Collections and Enforcement Administration • OTR Recorder of Deeds • OFOS District Integrated Financial System • OFOS Payroll <p>We will continue enhancing call center operations and building on foundational capabilities. Potential future enhancements include ability to use:</p> <ul style="list-style-type: none"> • Natural Language Processing: • Real-Time Agent Assistance • Predictive Analytics • Omnichannel Intelligence
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Attachment 18

	<p>Some of the advantages gained are</p> <p>Zero hardware investment required - agents need only a computer and reliable internet connection.</p> <p>Automatic maintenance handled by AWS with continuous updates, patches, and security enhancements.</p> <p>Instant scalability allows adding or removing agents with simple administrative portal changes.</p>	
<p>Improved Customer Experience Initiatives</p>	<p><u>OTR Website Redesign</u></p> <p>The Office of Tax and Revenue (OTR), with support from our partners in OCTO successfully redesigned, developed, and launched OTR’s new modernized OTR website to improve service delivery for all District stakeholders. shareholders. This project transformed the current site (otr.cfo.dc.gov) by enhancing its visual design and functionality, optimized mobile accessibility, improved usability and navigation, streamlined content, and introduced dynamic, user-friendly features. The redesigned platform provides a more intuitive and efficient experience, supporting OTR’s commitment to transparency, accessibility, and superior customer service.</p> <p>The new OTR website now provides:</p> <ul style="list-style-type: none"> • Improved Navigation • Improved Mobile responsiveness • Improved accessibility • Centralized content and updated information 	<p><u>Enhancement of Refund Status Messaging</u></p> <p>The Office of Tax and Revenue (OTR) is improving the messaging displayed in the “Where’s My Refund” feature on the MyTaxDC.gov portal. These enhancements will provide taxpayers with clearer, more informative status updates regarding their refund claims, addressing many of the most common questions without requiring direct contact with agency representatives.</p> <p>Measurable Benefits</p> <ul style="list-style-type: none"> • Reduction in Call Volume: By proactively answering common inquiries through enhanced messaging, OTR anticipates a 15–25% decrease in calls to the Customer Service Administration (CSA) and the Returns Integrity Unit (RIU). • Improved Taxpayer Experience: Clearer status updates reduce uncertainty and frustration,

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	<p>We will continue to enhance the agency’s digital presence. Futured enhancement will be driven by stakeholder feedback.</p> <p><u>OTR Podcast “Tax Talk DC”</u> The Office of Tax and Revenue (OTR) launched its new podcast, “Tax Talk DC”. This new platform is designed to keep our taxpayers informed and engaged by delivering timely, relevant, and easy-to-understand information on a wide range of tax-related topics.</p> <p>Through Tax Talk DC, listeners gain valuable insights into OTR programs, learn about important tax updates, and discover helpful public resources that make navigating the tax process simpler and more transparent. Our goal is to provide a convenient and accessible way for taxpayers to stay connected with OTR and better understand the services we offer.</p>	<p>leading to higher satisfaction scores in post-service surveys.</p> <ul style="list-style-type: none"> Operational Efficiency: Fewer inbound calls allow CSA and RIU staff to focus on complex cases, improving overall service quality and reducing average handling time. <p>Anticipated Impact</p> <ul style="list-style-type: none"> Faster Resolution for Taxpayers: Enhanced messaging minimizes delays caused by unnecessary inquiries, ensuring taxpayers receive timely and accurate information. Cost Savings: Lower call volumes translate into reduced staffing strain and potential overtime costs. <p>Scalability: This improvement supports future automation initiatives, paving the way for additional self-service features, that can be integrated into OTR new cloud-based omnichannel communications system.</p>
<p>Operational Efficiency Initiatives</p>		<p><u>D20 (Corporate Business Franchise Online Tax Form</u></p> <p>This initiative proposes adding the Corporate D-20 tax return to the MyTax portal to enable electronic filing. Currently, approximately 35% of filers, about 14,000 out of 40,000 D-20 returns filed in 2024 still submit paper returns. Transitioning these filings to an online format is expected to deliver significant operational benefits, including:</p>

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		<ul style="list-style-type: none">• Reduction in Paper Processing Costs: Lower expenses associated with TDEC, IDCS, archiving, and Federal Records Center (FRC) storage.• Improved Workflow Efficiency: Electronic submissions require businesses to register before filing, which will help reduce the FR-500 queue for non-registered businesses.• Enhanced Taxpayer Experience: Online filing minimizes manual errors and accelerates processing times, reducing the need for taxpayers to contact the Customer Service Administration (CSA) or Refund Inquiry Unit (RIU) for status updates—substantially decreasing call volumes. <p>This modernization effort aligns with OTR’s commitment to efficiency, accuracy, and improved taxpayer services.</p> <p>Measurable Benefits</p> <ul style="list-style-type: none">• Cost Savings: Reduction in paper processing costs associated with TDEC, IDCS, archiving, and Federal Records Center (FRC) storage. Estimated savings could exceed \$100,000 annually based on current processing volumes.
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		<ul style="list-style-type: none">• Error Reduction: Electronic submissions are expected to reduce manual data entry errors by 25%, improving accuracy and compliance.• Processing Time Improvement: Online filing can shorten return processing time by up to 25%, accelerating refund issuance and reducing backlog. <p>Anticipated Impact</p> <ul style="list-style-type: none">• Improved Workflow Efficiency: Electronic submissions require businesses to register before filing, which will help reduce the FR-500 queue for non-registered businesses.• Enhanced Taxpayer Experience: Online filing minimizes manual errors and accelerates processing times, reducing the need for taxpayers to contact the Customer Service Administration (CSA) or Refund Inquiry Unit (RIU) for status updates—potentially decreasing call volumes by 15–20%. <i>Note: combined filers will have to use MEF (vendor software) or paper.</i>• Scalability for Future Enhancements: This initiative lays the foundation for additional automation and integration with compliance systems.
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		<p><u>D40B (Nonresident Request for refund) Online Tax</u> The Office of Tax and Revenue (OTR) will introduce the D-40B tax form to the MyTax portal, reinforcing its commitment to operational efficiency and taxpayer service excellence.</p> <p>This enhancement provides taxpayers with a secure and convenient electronic submission option for D-40B Non-Resident Refund Request returns. Historically, this filing process was limited to paper submissions, which posed significant challenges, including inefficiencies in agency processing, increased risk of inaccuracies, and a diminished overall taxpayer experience. The transition to an electronic format addresses these issues by streamlining workflows, improving data integrity, and enhancing accessibility. In 2025, approximately 27,000 D-40B returns were processed, underscoring the importance of this modernization initiative.</p> <p>Expected measurable benefits, include:</p> <ul style="list-style-type: none">• Improved Processing Efficiency: Electronic submissions reduce manual handling, accelerating review and approval timelines.• Enhanced Accuracy: Automated data validation minimizes errors commonly associated with paper filings.• Cost Savings: Reduced reliance on physical mail and manual entry lowers administrative costs.
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		<p>Better Taxpayer Experience: Online filing offers greater accessibility, transparency, and convenience.</p> <p><u>OTR Operational System Modernization Project</u></p> <p>The Office of Tax and Revenue (OTR) is initiating a critical modernization project to update core operational systems and software currently running on end-of-life, deprecated, or non-compliant technology platforms.</p> <p>This effort is essential to ensure technology compliance, maintain system security, and support the agency’s strategic objectives for operational efficiency and service delivery.</p> <p>OTR’s operational infrastructure includes several systems and components that require immediate upgrades to meet current technology standards and compliance requirements. These include, but are not limited to:</p> <ul style="list-style-type: none">• Real Property CAMA Servers – Upgrade to supported hardware and software platforms to ensure stability and performance.• Real Property ROD Servers – Upgrade to supported hardware and software platforms to ensure stability and performance.
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		<ul style="list-style-type: none">• Microsoft Windows Server Upgrade – Transition from legacy versions to the latest supported Windows Server environment.• Windows 11 Desktop Upgrades – Migrate all agency desktops to Windows 11 for enhanced security and compatibility.• Microsoft .NET 8 Cross-Development Platform – Implement the latest .NET framework to support modern application development and integration. <p>Objectives</p> <ul style="list-style-type: none">• Ensure Technology Compliance: Replace outdated systems to meet current security and regulatory standards.• Improve Operational Efficiency: Reduce downtime and maintenance costs associated with legacy systems.• Enhance Security: Mitigate risks posed by unsupported platforms and vulnerabilities.• Enable Future Innovation: Provide a modern foundation for advanced tools, automation, and digital services.
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		<p>Anticipated Impact</p> <ul style="list-style-type: none">• Reduced Risk: Eliminate exposure from unsupported systems and improve technology security posture.• Cost Savings: Lower maintenance and support costs for legacy infrastructure.• Improved Performance: Enhance system reliability and user experience across OTR operations.• Scalability: Position OTR for future technology initiatives and integration with emerging platforms.
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Attachment 23

23. Please list and describe any ongoing investigations, audits, or reports on your agency or any employee of your agency, or any investigations, studies, audits, or reports on your agency or any employee of your agency that were completed during FY25 and FY26 to date.

Internal Audit Division

FY 2025

- Audit of Internal Controls over Adjustments- Revenue Accounting Administration
Status: Final Report Issued October 2024

The objective was to determine whether the Revenue Accounting Administration (RAA) maintained a system of internal controls that safeguarded the District's assets and assured reliable documentation is maintained to support changes made to taxpayer's accounts. We did not provide any recommendations in this report.

- Audit of the Revenue and Expenditure Report of the Office of the State Superintendent of Education (OSSE)'s Office of Public Charter School Financing and Support (OPCSFS)'s Direct Loan and Credit Enhancement Fund (DLCEF) for the Fiscal Year (FY) ended September 30, 2023 *Status: Final Report Issued November 2024*

The objectives of the Audit were to: a) express an opinion on the statement of revenues and expenditures; b) determine whether expenditures/costs charged to the Fund were proper; c) whether internal controls over fund transactions and financial reporting were adequate; and d) determine whether the Fund is administered in accordance with laws and regulations. We provided three (3) recommendations in this report. The agency concurred with the three (3) recommendations and provided corrective action plans.

- Audit of Internal Controls over Cashiering Operations-University of the District of Columbia *Status: Final Report Issued January 2025*

To determine whether the Office of Finance and Treasury (OFT) maintained adequate internal controls over cashiering operations at the University of the District of Columbia. We provided three (3) recommendations in this report. The agency concurred with the three (3) recommendations and provided corrective action plans.

Attachment 23

- Audit of Internal Controls over Adjustments- Office of the Taxpayer Advocate
Status: Final Report Issued January 2025

The objective was to determine whether the Office of the Taxpayer Advocate (OTA) maintained a system of internal controls that safeguarded the District's assets and assured reliable documentation is maintained to support changes made to taxpayer's accounts. We provided two (2) recommendations in this report. The agency concurred with the two (2) recommendations and provided corrective action plans.

- Audit of the Inmate Welfare Fund Financial Statements for the Fiscal Year Ended September 30, 2024
Status: Final Report Issued January 2025

The objectives of the Audit were to: a) express an opinion on the financial statements of the Fund; b) determine whether expenditures/costs charged to the Fund were proper; c) determine whether internal controls over fund transactions and financial reporting were adequate; and d) determine whether the Fund is administered in accordance with laws and regulations. We provided one (1) recommendation in this report. The agency concurred with the one (1) recommendation and provided a corrective action plan.

- Audit of Internal Controls over the OLG Customer Service and Prize Claims Center
Status: Final Report Issued March 2025

The objectives of our audit are to determine whether: 1) lottery claims are handled in accordance with OLG Policies and Procedures and District Regulations and 2) controls over OLG merchandise inventory are properly maintained. We provided one (1) recommendation in this report. The agency concurred with the one (1) recommendation and provided a corrective action plan.

- Audit of Internal Controls over the Refund Process: Non-Resident Refunds
Status: Final Report Issued May 2025

The overall objective of the audit is to determine whether internal controls over the processing and approval of refunds are effective. The first phase of our audit will focus specifically on Non-Resident refunds. We provided four (4) recommendations in this report. The agency concurred with the four (4) recommendations and provided corrective action plans.

- Audit of the Homestead Deduction Program
Status: Final Report Issued: June 2025

The overall objective of the audit is to determine whether internal controls over the processing and approval of the Homestead Tax Deduction Program are effective. We provided five (5) recommendations in this report. The agency concurred with the five (5) recommendations and provided corrective action plans.

Attachment 23

- Audit of Internal Controls over the OFT Payment Operations Center *Status: Final Report Issued June 2025*

The objectives of the audit are to determine whether the POC: (1) has effective internal controls; and (2) is in compliance with applicable policies and procedures. We provided four (4) recommendations in this report. The agency concurred with the four (4) recommendations and provided corrective action plans.

- Audit of the New Columbia Fund Statement of Revenue and Expenditures for the Fiscal Year ended September 30, 2024 *Status: Final Report Issued June 2025*

The objectives of the audit are to: a) express an opinion on the statement of revenues and expenditures of the Fund; b) determine whether expenditures/costs charged to the Fund were prop-er; c) whether internal controls over Fund transactions and financial reporting were adequate; and d) determine whether the Fund is administered in accordance with laws and regulations. We did not provide any recommendations in this report.

- Audit of Internal Controls over the Marketing Merchandise Inventory Process at OLG *Status: Final Report Issued July 2025*

The objectives of our audit are to determine whether the: 1) OLG Marketing merchandise inventory is maintained in accordance with OLG Policies and Procedures and District Regulations; 2) controls over the OLG Marketing merchandise inventory process are proper to safeguard assets. We provided four (4) recommendations in this report. The agency concurred with the four (4) recommendations and provided corrective action plans.

FY 2026

- Audit of the OPCSFS DLCEF Revenue and Expenditure Report for Fiscal Year Ended September 30, 2024 *Status: Final Report Issued October 2025*

The objectives of the audit are to: a) express an opinion on the statement of revenues and expenditures of the Fund; b) determine whether expenditures/costs charged to the Fund were proper; c) whether internal controls over Fund transactions and financial reporting were adequate; and d) determine whether the Fund is administered in accordance with laws and regulations. We provided three (3) recommendations in this report. The agency concurred with the three (3) recommendations and provided corrective action plans.

Attachment 23

- Audit of OCFO Vendor Payments *Status: Final Report Issued November 2025*

The objectives of our audit are to determine whether: 1) OMA handles OCFO vendor payments in accordance with the Quick Payment Act and 2) internal controls over vendor payments are effective. We did not provide any recommendations in this report.

- Audit of Internal Controls over the Refund Process-Business and Real Property Refunds *Status: Draft Report Issued December 2025*

The overall objective of the audit is to determine whether internal controls over the processing and approval of refunds are effective.

- Audit of Internal Controls over the Offer In Compromise Program *Status: Reporting Phase*

The overall objectives of the audit are to determine whether the Offer in Compromise program has effective internal controls in place and is operating in accordance with relevant policies, procedures, and regulations to ensure the timely collection of revenue.

- Audit of the Inmate Welfare Fund Financial Statements for the Fiscal Year Ended September 30, 2025 *Status: Reporting Phase*

The objectives of the Audit were to: a) express an opinion on the financial statements of the Fund; b) determine whether expenditures/costs charged to the Fund were proper; c) determine whether internal controls over fund transactions and financial reporting were adequate; and d) determine whether the Fund is administered in accordance with laws and regulations.

- Audit of Internal Controls over OFT Kiosk Operations *Status: Planning Phase*

To determine whether the Office of Finance and Treasury (OFT): (1) has effective internal controls in place over kiosk operations; and (2) operates in accordance with relevant policies, procedures, and regulations to ensure the timely collection of revenue.

- Audit of OPRS Receipts and Disbursements *Status: Planning Phase*

The objectives of our audit are to determine: 1) whether internal controls over the handling of receipts and disbursements of payroll-related transactions and benefits adequately provide for timely and accurate processing; and 2) whether the receipt and disbursement of payments follow OFOS policies and procedures.

Attachment 23

- Audit of the OLG Draw Process *Status: Planning Phase*

The objective of the audit is to determine whether internal controls are adequate to safeguard the OLG Draw Process to include security of lottery facilities and equipment as well as the accuracy of advertised drawings.

The following reports were issued in FYs 2023-2026 as of January 31, 2026, with recommendations to the OCFO.

Inspector General Reports

- Evaluation of the District of Columbia Government’s Management and Valuation of Commercial Real Property Assessments (22-1-25AT), Issued November 30, 2022
- Management Alert to OCFO and OCP (Diverted Payments) (MAR-002) Issued May 29, 2025

• **OFFICE OF INSPECTOR GENERAL RECOMMENDATIONS**

Evaluation of the District of Columbia Government’s Management and Valuation of Commercial Real Property Assessments (22-1-25AT), Issued November 30, 2022	
Recommendation	Status
<p><i>Recommendation 1.</i> We recommend that RPAD management develop a plan for periodically inspecting properties so there is reasonable assurance that property characteristics data are up to date. This recommendation is repeated from OIG Report No.16-1-14AT <i>Evaluation of the District of Columbia Government’s Management and Valuation of Commercial Real Property Assessments (Issued April 10, 2017)</i></p> <p><i>Recommendation 2</i></p>	<p>Corrective action is in progress.</p>
<p><i>Recommendation 2.</i> We recommend that RPAD reconfigure the CAMA system to begin recording sale qualifications with respect to sales-ratio</p>	<p>The OCFO disagreed with the recommendation. No corrective action taken.</p>

<p>study purposes as well as validations with respect to modeling purposes. This recommendation is repeated from OIG Report No.16- 1-14AT <i>Evaluation of the District of Columbia Government's Management and Valuation of Commercial Real Property Assessments (Issued April 10, 2017)</i> Recommendation 3</p>	
<p>Recommendation 3. We recommend that RPAD not use code 07 unless there is convincing documentation that the sale was “speculative.” This recommendation is repeated from OIG Report No.16- 1-14AT <i>Evaluation of the District of Columbia Government's Management and Valuation of Commercial Real Property Assessments (Issued April 10, 2017)</i> Recommendation 4.</p>	<p>The OCFO disagreed with the recommendation. No corrective action taken.</p>
<p>Recommendation 4. We recommend that RPAD seek to require I&E submissions before the assessment notice deadline by seeking the appropriate legislative remedy. This recommendation is repeated from OIG</p>	<p>Corrective action is in progress.</p>

<p>Report No.16-1-14AT Evaluation of the District of Columbia Government's Management and Valuation of Commercial Real Property Assessments (Issued April 10, 2017) Recommendation 8.</p>	
<p>Recommendation 5. Crowe recommends that RPAD implement a global review process for ratio study results. These ratio studies should be properly conducted and included as a part of the valuation process. Final appraised values should not be approved until quality standards are met. Key internal stakeholders and valuation team leaders should regularly review market movements and ratio study results together. RPAD should examine every step of the commercial valuation process for the various property types and sub-market areas to look for components, practices, and factors that may lead to appraised values that are below market value</p>	<p>Corrective action implemented.</p>
<p>Recommendation 6a. Crowe recommends</p>	<p>The OCFO partially agreed with the recommendation</p>

<p>that RPAD do a thorough review of data quality, valuation practices, and valuation models in the identified strata. Specifically: a) We recommend that RPAD further improve the valuation of office buildings by reviewing property data for accuracy and consistency and by building data analysis skills. Because capitalization rates are so critical to value determination and office sales are relatively scarce, office sales should be thoroughly researched, and consideration should be given to expanding sample sizes through use of prior year sales time-adjusted to the valuation date. Again, building data analysis skills will help, and continuing to check capitalization and other income rates with those reported in industry publications and services will provide additional support. This recommendation is repeated from OIG Report No.16-1-14AT <i>Evaluation of the District of Columbia Government's Management and Valuation of Commercial Real Property Assessments (Issued April 10,</i></p>	<p>and implemented corrective action. No further corrective action taken.</p>
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<p>2017) Recommendation 11</p>	
<p>Recommendation 6b(i). We recommend that RPAD develop and vet a plan for valuing retail properties at market value consistent with other properties in the District. This could be accomplished by phasing in increases over a 2- or 3-year period. The plan should include consideration of whether: i) The nine market areas used for offices are adequate for retail properties. Although the situation may well be different in the District, retail market areas or neighborhoods usually follow traffic corridors more than offices do. Again, while this may well not apply in the District, it would be prudent to consider whether retail areas should be defined separately from office areas.</p>	<p>The OCFO disagreed with the recommendation. No corrective action taken.</p>
<p>Recommendation 6b(ii). Additional space types, easily accommodated in the CAMA system, would be helpful. One example is restaurants. Current rent tables provide a separate rate for restaurant spaces but do not distinguish between fast-food and full service</p>	<p>The OCFO disagreed with the recommendation. No corrective action taken.</p>

<p>restaurants. Although appraisers can apply adjustments for "tenant appeal," standardizing rates creates consistency and lessens the need for individual property adjustments. This recommendation is repeated from OIG Report No.16-1-14AT <i>Evaluation of the District of Columbia Government's Management and Valuation of Commercial Real Property Assessments (Issued April 10, 2017)</i> Recommendation 12</p>	
<p>Recommendation 7. We recommend that RPAD adopt procedures for valuing air rights and add them to the ARM and/or Employee Handbook. This recommendation is repeated from OIG Report No.16-1-14AT <i>Evaluation of the District of Columbia Government's Management and Valuation of Commercial Real Property Assessments (Issued April 10, 2017)</i> Recommendation 10</p>	<p>Corrective action implemented.</p>
<p>Recommendation 8. Crowe recommends that RPAD use at least 3 years and preferably 5 years of commercial property sales in valuation and</p>	<p>The OCFO did not concur with the recommendation. No corrective action taken.</p>

<p>sales ratio studies. Statistical modeling should be used to produce time trends that adjust all sales to the effective date of the reassessment.</p>	
<p>Recommendation 9. We recommend that RPAD begin reporting ratio study statistics with respect to assessed values on the roll at the time of sale rather than, or in addition to, assessed values anticipated to be enrolled later, as are currently reported. This recommendation is repeated from OIG Report No.16- 1-14AT <i>Evaluation of the District of Columbia Government's Management and Valuation of Commercial Real Property Assessments (Issued April 10, 2017)</i> Recommendation 16</p>	<p>The OCFO did not concur with the recommendation. No corrective action taken.</p>
<p>Recommendation 10. We recommend that RPAD transition to computing and reporting ratio statistics by property type and market area. This recommendation is repeated from OIG Report No.16-1-14AT <i>Evaluation of the District of Columbia Government's Management and Valuation of Commercial Real Property Assessments (Issued April 10,</i></p>	<p>Corrective action implemented.</p>

<p>2017) Recommendation 17</p>	
<p>Recommendation 11. We recommend that RPAD begin to adopt a standard-accepted trimming rule while performing ratio studies in accordance with Appendix B of the IAAO Standard on Ratio Studies rather than the arbitrary ratio boundaries of 0.40 to 1.60 presently employed. This recommendation is repeated from OIG Report No.16-1-14AT <i>Evaluation of the District of Columbia Government's Management and Valuation of Commercial Real Property Assessments (Issued April 10, 2017)</i> Recommendation 18</p>	<p>The OCFO did not concur with the recommendation. No corrective action taken.</p>
<p>Recommendation 12: We recommend that RPAD take steps to compute and, when appropriate, publish confidence intervals for important statistics. This would enable readers to judge whether an apparent success or failure is more likely to reflect a fluke of small samples rather than a real problem with the appraisals. This recommendation is repeated from OIG Report No.16-1-14AT <i>Evaluation of the District of Columbia</i></p>	<p>Corrective action implemented.</p>

<p><i>Government's Management and Valuation of Commercial Real Property Assessments (Issued April 10, 2017)</i> Recommendation 19</p>	
<p>Recommendation 13: We recommend that RPAD begin to compute and, when appropriate, publish PRBs. This recommendation is repeated from OIG Report No.16-1-14AT <i>Evaluation of the District of Columbia Government's Management and Valuation of Commercial Real Property Assessments (Issued April 10, 2017)</i> Recommendation 20</p>	<p>The OCFO did not concur with the recommendation. No corrective action taken.</p>
<p>Recommendation 14. We recommend that RPAD begin to produce statistical graphics to facilitate quick comprehension of patterns not immediately observable from numeric tables. This recommendation is repeated from OIG Report No.16-1-14AT <i>Evaluation of the District of Columbia Government's Management and Valuation of Commercial Real Property Assessments (Issued April 10, 2017)</i> Recommendation 21</p>	<p>Corrective action implemented.</p>

<p>Recommendation 15. We recommend that RPTA produce a USPAP-compliant mass appraisal report based on the ARM. The report would blend procedural narratives with statistical data on valuation parameters such as rents, expense ratios, and capitalization rates. The aim is to make public more evidence of the credibility of assessments. The recent additions related to residential and residential land valuation provide a template for changes that would be desirable in the discussion of commercial valuation procedures. This recommendation is repeated from OIG Report No.16-1-14AT <i>Evaluation of the District of Columbia Government's Management and Valuation of Commercial Real Property Assessments (Issued April 10, 2017)</i> Recommendation 22</p>	<p>Corrective action implemented.</p>
<p>Recommendation 16. We recommend that efforts continue to improve how RPTA defends assessments under appeal. This can be done by: • Continuing to monitor the quality of its valuation</p>	<p>The OCFO did not concur with the recommendation. No corrective action taken.</p>

performance as it already does via its appeals tracking system, recognizing that a superior measure of performance is found in assessment to sales price ratio studies. • Augmenting its efforts to manage its appeal/litigation management system, with attention not only to monitoring conditional liabilities and calendar related workflows, but also to the management of related documents and professional services. • Considering whether to advocate for a redress in the appeal incentives from a game theoretic perspective, either by advocating for an increase in the cost to property owners of filing an appeal, perhaps on a recurring basis to spur their prompt resolution, or by adopting social pressures rather than, or in addition to, economic incentives to address the situation. This recommendation is repeated from OIG Report No.16-1-14AT Evaluation of the District of Columbia Government's Management and Valuation of Commercial Real Property Assessments

<p>(Issued April 10, 2017) Recommendation 23</p>	
<p>Recommendation 17. Crowe recommends expanding HR Business Partner support of OTR’s organizational structure, workload statistics, performance measures, compensation requirements, staffing levels, training, qualifications, and staff development functions</p>	<p>The OCFO did not concur with the recommendation. No corrective action taken.</p>
<p>Recommendation 18. Additionally, we recommend that RPTA adopt measures to link operational activities to its organizational strategic plan and mission. In addition, key human resources metrics, such as Yield Ratios (ratio of offers to acceptance, interview-to-offer ratio, invitations-to-interview ratio, advertisements, or contacts-to-applicant ratio), should be established. RPTA personnel should compile an effective set of financial measures and operational measures (on customer satisfaction, internal processes, and the RPTA’s innovation and improvement activities) that will put RPTA’s strategy</p>	<p>The OCFO did not concur with the recommendation. No corrective action taken.</p>

<p>and vision at the center of its operations. This tool would drive its personnel to adopt behaviors and invest in actions that are critical to arrive at strategic and operational goals and align them toward an overall vision. This recommendation is repeated from OIG Report No.16-1-14AT <i>Evaluation of the District of Columbia Government's Management and Valuation of Commercial Real Property Assessments (Issued April 10, 2017)</i> Recommendation 32</p>	
<p>Recommendation 19. Crowe recommends reinstating the monetary award component of the OCFO Incentive and Performance Recognition Award Program and training the Chief Appraiser and Supervisory Appraisers to recognize and reward these contributions.</p>	<p>Corrective action implemented.</p>
<p>Recommendation 20. RPAD should develop formal policies and procedures to assign responsibility for tracking and monitoring the implementation status for recommendations.</p>	<p>Corrective action in progress.</p>
<p>Recommendation 21. We recommend that</p>	<p>The OCFO did not concur with the recommendation.</p>

<p>RPTA establish an Office of Quality Assurance, Best Practices, and Innovation to: (a) conduct random and regular independent assessments of quality in all core processes; (b) assess performance against best practices; (c) study the commercial real property assessment practices of state and local government entities across the United States; and (d) engage in process innovation to enhance service delivery. This Office should report directly to the Director of RPTA and report yearly to the District's CFO. This recommendation is repeated from <i>OIG Report No.16-1-14AT Evaluation of the District of Columbia Government's Management and Valuation of Commercial Real Property Assessments (Issued April 10, 2017)</i> Recommendation 28</p>	<p>No corrective action taken.</p>
<p>Recommendation 22. RPAD monitor and retain documentation to support their progress against key performance indicators. This recommendation is repeated from <i>OIG Report No.16- 1-14AT Evaluation of</i></p>	<p>Corrective action in progress.</p>

<p><i>the District of Columbia Government's Management and Valuation of Commercial Real Property Assessments (Issued April 10, 2017)</i> Recommendation 30</p>	
<p>Recommendation 23. We recommend that RPTA develop a structured staff development and training program that is based on the following: • An organizational analysis; and • A job analysis of KSA for each function. Also, RPTA should clearly articulate training goals for each individual and establish criteria by which the effects of training can be measured. This recommendation is repeated from OIG Report No.16-1-14AT <i>Evaluation of the District of Columbia Government's Management and Valuation of Commercial Real Property Assessments (Issued April 10, 2017)</i> Recommendation 34</p>	<p>Corrective action implemented.</p>
<p>Recommendation 24. We recommend that RPAD implement the following: 24a• A review of the staff qualifications be performed in accordance with</p>	<p>24a. The OCFO did not concur with the recommendation. No corrective action taken. 24b. Corrective action implemented.</p>

<p>IAAO standards. This review should be performed on an annual basis. 24b • A training program be developed to ensure all staff are appropriately trained, qualified, and certified</p>	
<p>Recommendation 25. Crowe recommends retaining a compensation consulting firm with public and private sector and/or commercial appraisal compensation expertise to ensure relevant compensation data is considered when market-pricing commercial appraiser positions.</p>	<p>The OCFO did not concur with the recommendation. No corrective action taken.</p>
<p>Recommendation 26. Crowe recommends clarifying the equivalent work experience policy for commercial appraiser hiring decisions by adding consistent work experience equivalency language to Commercial Appraiser grade 12 and 13 job descriptions and informing the appropriate HR and OTR practice stakeholders. This recommendation is repeated from OIG Report No.16-1-14AT <i>Evaluation of the District of Columbia Government's Management and</i></p>	<p>The OCFO did not concur with the recommendation. No corrective action taken.</p>

<p><i>Valuation of Commercial Real Property Assessments (Issued April 10, 2017)</i> Recommendation 35.</p>	
<p>Recommendation 27. We also recommend the OCFO provide the revised job descriptions to commercial appraisers, as required by the Master Agreement noted in the Criteria. This recommendation is repeated from OIG Report No.16-1-14AT <i>Evaluation of the District of Columbia Government's Management and Valuation of Commercial Real Property Assessments (Issued April 10, 2017)</i></p>	<p>Corrective action taken.</p>
<p>Recommendation 28. We recommend that RPTA design, document, and implement effective succession and contingency plans. This will ensure seamless continuity of RPTA strategy and operations in the event of an unanticipated vacancy in either role. The succession plans should be approved by senior management. To ensure accountability, responsibility for this key program should be embodied within</p>	<p>Corrective action taken.</p>

<p>the position description for each role. Key metrics should be designed to monitor and evaluate the program periodically. This recommendation is repeated from OIG Report No.16- 1-14AT <i>Evaluation of the District of Columbia Government's Management and Valuation of Commercial Real Property Assessments (Issued April 10, 2017)</i> Recommendation 36</p>	
<p>Recommendation 29. Additionally, Crowe recommends that the OCHRO develop a written succession plan for the Chief Appraiser position and reinstating the Deputy Chief Appraiser and/or creating a Commercial Unit Manager role to provide additional leadership development opportunities for Supervisory Appraisers and reduce the number of direct reports to the Chief Appraiser. This recommendation is substantially similar and repeated from OIG Report No.16- 1-14AT <i>Evaluation of the District of Columbia Government's</i></p>	<p>The OCFO did not concur with the recommendation. No corrective action taken..</p>

<p><i>Management and Valuation of Commercial Real Property Assessments (Issued April 10, 2017)</i> Recommendation 27</p>	
<p>Recommendation 30. We also recommend that an organizational structure impact analysis be conducted when appropriate to ensure the OTR organization structure is aligned to OCFO 2017- 2021 Strategic Plan revisions when the plan is updated. This recommendation is repeated from OIG Report No.16-1-14AT Evaluation of the District of Columbia Government’s Management and Valuation of Commercial Real Property Assessments (Issued April 10, 2017) Recommendation 24</p>	<p>Corrective action implemented.</p>
<p>Recommendation 31. Crowe recommends implementing an HR Business Partner driven process to gather and analyze OTR hiring practice stakeholder feedback on a periodic and event-driven basis. We also recommend adding hiring practice effectiveness and stakeholder experience HR KPIs</p>	<p>The OCFO did not concur with the recommendation. No corrective action taken.</p>
<p>Recommendation 32. Crowe recommends gathering and</p>	<p>The OCFO did not concur with the recommendation. No corrective action</p>

<p>analyzing OTR hiring practice stakeholder feedback regarding fostering vital interpersonal relationships and information networks, providing a sense of organizational culture, and determining how well employees understand their new jobs and related expectations on a periodic and event-driven basis. We also recommend HR KPIs include hiring practice effectiveness and stakeholder experience metrics</p>	<p>taken.</p>
<p>Recommendation 33. Crowe recommends expanding HR Business Partner responsibilities to include guidance and support of OTR hiring practices. We also recommend monthly reviews of current and projected hiring needs, hiring process status, HR KPI results, potential improvements, lessons learned, and identification and resolution of current or emerging hiring practice issues. This recommendation is repeated from OIG Report No.16-1-14AT <i>Evaluation of the District of Columbia Government's Management and Valuation of Commercial Real</i></p>	<p>The OCFO did not concur with the recommendation. No corrective action taken.</p>

<p><i>Property Assessments (Issued April 10, 2017) Recommendation 37</i></p>	
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<p>Management Alert to OCFO and OCP (Diverted Payments) Issued May 29, 2025</p>	
<p>Recommendation</p>	<p>Status</p>
<p><i>Recommendation 1.</i> Work with the Office of the Chief Technology Officer to implement mandatory automated compliance checkpoints in DIFS that prevent processing ACH payment changes until all required verification steps are completed and documented.</p>	<p>Corrective action implemented.</p>
<p><i>Recommendation 2.</i> Work with the Office of the Chief Technology Officer to implement more robust identify verification protocols for updating vendors' payment portal profiles.</p>	<p>Corrective action in progress.</p>

DC Auditor Reports

- The District's FY 2022 Annual Comprehensive Financial Report Mischaracterized the Relationship Between the District and the D.C. Housing Authority January 4, 2024

DC AUDITOR RECOMMENDATIONS

The District's FY 2022 Annual Comprehensive Financial Report Mischaracterized the Relationship Between the District and the D.C. Housing Authority (Management Alert Report) Issued January 4, 2024	
Recommendation	Status
<p>Recommendation 1. The OCFO should recognize DCHA as a component unit and then proceed to determine the specific GASB requirements for reporting DCHA's financial information in the District's financial statements, based on reasonable judgments about the nature and significance of the relationship between the District and DCHA</p>	<p>The OCFO did not concur with the recommendation. No corrective action taken.</p>
<p>Recommendation 2. In accordance with GASB standards, the OCFO should include financial information of DCHA in the appropriate portions of the District's financial statements and ACFR for FY 2023. Alternatively, if the OCFO determines that DCHA's financial information cannot be included because the information is incomplete or unaudited, and if doing so is consistent with statutory and contractual requirements to prepare the District's financial statements in accordance with generally accepted accounting principles</p>	<p>The OCFO did not concur with the recommendation. No corrective action taken.</p>

<p>66 then the OCFO should qualify the ACFR's assertion that the District's financial statements were prepared in accordance with GASB standards</p>	
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Office of Integrity and Oversight Internal Audit Reports

For the period, the OCFO Office of Integrity and Oversight issued 32 reports as follows:

FY 2023

- Audit of Internal Controls over the OPRS Processing of Time Reporting for OCFO Employees. *Status: Final Report Issued October 2022* We provided three (3) recommendations in this report. The agency concurred with the three (3) recommendations and provided corrective action plans.
- Audit of the OPCSFS Direct Loan and Credit Enhancement Statement of Revenues and Expenditures for FY 2021 *Status: Final Report Issued January 2023* No recommendations were provided in this report.
- Audit of the Inmate Welfare Fund Financial Statements for the Fiscal Year Ended September 30, 2022 *Status: Final Report Issued January 2023* No recommendations were provided in this report.
- Audit of Internal Controls Over Unclaimed Property *Status: Final Report Issued January 2023* We provided four (4) recommendations in this report. The agency concurred with three (3) of the four (4) recommendations and provided corrective action plans.
- Audit of Internal Controls over Kiosk Operations *Status: Final Report Issued April 2023* We provided eight (8) recommendations in this report. The agency concurred with the eight (8) recommendations and provided corrective action plans.
- Audit of the New Columbia Statehood Fund Statement of Revenues and Expenditures for FY 2022. *Status: Final Report Issued March 2023* No recommendations were provided in this report.
- Audit of the Revenue and Expenditure Report of the OPCSFS Direct Loan and Credit Enhancement Fund as of September 30, 2022. *Status: Final report Issued September 2023* No recommendations were provided in this report.

- Audit of Internal Controls over the Office of the Chief Financial Officer's (OCFO) Information Technology (IT) Equipment – Cell Phones and Tablets Phase I *Status: Final Report Issued September 2023* We provided five (5) recommendations in this report. The agency concurred with the five (5) recommendations and provided corrective action plans.

FY 2024

- Audit of Internal Controls over the Office of the Chief Financial Officer's (OCFO) Information Technology (IT) Equipment – Cell Phones and Tablets Phase II *Status: Final Report Issued October 2023* No recommendations were provided in this report.
- Audit of the Office of Finance and Treasury Central Collections Unit (CCU) Debt Collection Process *Status: Final Report Issued November 2023* We provided four (4) recommendations in this report. The agency concurred with the four (4) recommendations and provided corrective action plans.
- Audit of the Inmate Welfare Fund Financial Statements for the Fiscal Year Ended September 30, 2023 *Status: Final Report Issued January 2024* We provided three (3) recommendations in this report. The agency concurred with the three (3) recommendations and provided corrective action plans.
- Audit of the Office of Lottery and Gaming (OLG) Information Technology (IT) Asset Tracking Process *Status: Final Report Issued April 2024* We provided (2) two recommendations in this report. The agency concurred with the two (2) recommendations and provided corrective action plans.
- Audit of Internal Controls over Adjustments-Audit and Criminal Investigation Administration *Status: Final Report Issued May 2024* We provided four (4) recommendations in this report. The agency concurred with the four (4) recommendations and provided corrective action plans.
- Audit of Internal Controls over Adjustments-Collection and Enforcement Administration *Status: Final Report Issued May 2024* We provided five (5) recommendations in this report. The agency concurred with the five (5) recommendations and provided corrective action plans.
- Audit of the New Columbia Fund Statement of Revenue and Expenditures for FY Ended September 30, 2023 *Status: Final Report Issued May 2024* We did not provide any recommendations in this report.
- Audit of Internal Controls over Cashiering Operations-St. Elizabeth Campus *Status: Final Report Issued June 2024* We provided five (5) recommendations in

this report. The agency concurred with the five (5) recommendations and provided corrective action plans.

- Audit of Internal Controls over the Stop Payment and Returned Check Process
Status: Final Report Issued July 2024 We provided ten recommendations in this report. The agency concurred with the ten recommendations and provided corrective action plans.
- Audit of Internal Controls over Adjustments- Customer Service Administration
Status: Final Report Issued August 2024 We provided two (2) recommendations in this report. The agency concurred with the two (2) recommendations and provided corrective action plans.
- Audit of Internal Controls over Adjustments- Real Property Tax Administration
Status: Final Report Issued September 2024 We provided three (3) recommendations in this report. The agency concurred with the three (3) recommendations and provided corrective action plans.

FY 2025

- Audit of Internal Controls over Adjustments- Revenue Accounting Administration
Status: Final Report Issued October 2024 We did not provide any recommendations in this report.
- Audit of the Revenue and Expenditure Report of the Office of the State Superintendent of Education (OSSE)'s Office of Public Charter School Financing and Support (OPCSFS)'s Direct Loan and Credit Enhancement Fund (DLCEF) for the Fiscal Year (FY) ended September 30, 2023
Status: Final Report Issued November 2024 We provided three (3) recommendations in this report. The agency concurred with the three (3) recommendations and provided corrective action plans.
- Audit of Internal Controls over Cashiering Operations-University of the District of Columbia
Status: Final Report Issued January 2025 We provided three (3) recommendations in this report. The agency concurred with the three (3) recommendations and provided corrective action plans.
- Audit of Internal Controls over Adjustments- Office of the Taxpayer Advocate
Status: Final Report Issued January 2025 We provided two (2) recommendations in this report. The agency concurred with the two (2) recommendations and provided corrective action plans.
- Audit of the Inmate Welfare Fund Financial Statements for the Fiscal Year Ended September 30, 2024
Status: Final Report Issued January 2025 We provided one

(1) recommendation in this report. The agency concurred with the one (1) recommendation and provided a corrective action plan.

- Audit of Internal Controls over the OLG Customer Service and Prize Claims Center *Status: Final Report Issued March 2025* We provided one (1) recommendation in this report. The agency concurred with the one (1) recommendation and provided a corrective action plan.
- Audit of Internal Controls over the Refund Process: Non-Resident Refunds *Status: Final Report Issued May 2025* We provided four (4) recommendations in this report. The agency concurred with the four (4) recommendations and provided corrective action plans.
- Audit of the Homestead Deduction Program *Status: Final Report Issued: June 2025* We provided five (5) recommendations in this report. The agency concurred with the five (5) recommendations and provided corrective action plans.
- Audit of Internal Controls over the OFT Payment Operations Center *Status: Final Report Issued June 2025* We provided four (4) recommendations in this report. The agency concurred with the four (4) recommendations and provided corrective action plans.
- Audit of the New Columbia Fund Statement of Revenue and Expenditures for the Fiscal Year ended September 30, 2024 *Status: Final Report Issued June 2025.* We did not provide any recommendations in this report.
- Audit of Internal Controls over the Marketing Merchandise Inventory Process at OLG *Status: Final Report Issued July 2025* We provided four (4) recommendations in this report. The agency concurred with the four (4) recommendations and provided corrective action plans.

FY 2026

- Audit of the OPCSFS DLCEF Revenue and Expenditure Report for Fiscal Year Ended September 30, 2024 *Status: Final Report Issued October 2025* We provided three (3) recommendations in this report. The agency concurred with the three (3) recommendations and provided corrective action plans.
- Audit of OCFO Vendor Payments *Status: Final Report Issued November 2025.* We did not provide any recommendations in this report.

The status of the recommendations is as follows:

Attachment 24

FY	Reports Issued	Number of Recommendations	Number of Open Recommendations	Number of Closed Recommendations
2023	8	20	7	13
2024	11	38	18	20
2025	11	27	20	7
2026	2	3	0	3
Total	32	88	45	43

Agency officials are responsible for taking the corrective actions they have agreed to in their responses to individual Final Reports. Periodically, OIO sends agencies a Follow-up survey to determine the status of open recommendations or conduct a Follow-up audit and incorporate the follow-up of prior year recommendations in our review. The status of the prior recommendations are verified and included in our Final Report.

Database name

A&T (Assessment and Taxation records database)

Absolute

Account Reconciliation Processing System (ARP)

Active Directory – Microsoft product

Aspect

CAMA

CAMA (Legacy)

CARSS (Capital Asset Replacement Scheduling System)

CCaaS

Central Collection Unit (CCU)

CFO\$olve database

Change Control System (CCB)

Cisco Security Services

Cobblestone

Comprehensive Automated Personnel and Payroll
(CAPPS)

Contract and Employee Tracking System (CETS)

County Fusion/Kofile

CyberArk

Debt Manager

DGAS (Grants)

DIFS (District's Integrated Financial System)

DUO

EasyLobby

eFOIA
Everbridge & Snapcomms
Gift Cards (GC)
GIS Pictometry
iNovah
Integrated Data Capture System (IDCS)
Interim Budget Application (IBA)
Internal Control System (ICS/RCM)
KAPS
Keseya VSA
KnowBe4
Manage Engine AD-Audit
Mobile Data Collection System
Modernized Integrated Tax System (MITS)
OCFO Financial Disclosure

OCFO SharePoint Web Application Portal for OCFO Agencies.

OCIO PASF

OFT Banking Information

Oomnitza

OPRS

Pensioners Automated Payroll (PAPS)

Portal

SOAR Financial Accounting System

SolarWinds

Splunk

Tenable

Treasury Management System

Unified Payroll Personnel System (UPPS)

URG (Unrecorded Grants)

Detailed description of information within database	Date of database establishment (Age in years)
Contains information scanned until 2008 for Ownership, and Lot history	18+
User Device Security Monitoring	3
Contains Check Issues and their paid, voided, cancelled status	41+
Authentication and Authorization System database used to control access to OCFO Local Area Network and applications	25+
Telephony System for Inbound and outbound calling	12
Contains current information of Real Property Assessment and other related attributes	10
Contains historical information of Real Property Assessment and other related attributes	21+
Strategic long-range asset management tool to efficiently and effectively develop an prioritize an asset-based capital plan.	10
Cloud Based contact center as a service for Omnichannel contact center, including Inbound and outbound calling	1 month
Third-party system used to OFT to monitor collection agency activities on behalf of the District	7
Contains all the General Ledger and Accounting system financial transactions, Purchase Order information, HR Position information, Employee Position and Payroll information. This data supports both Tableau and CFO\$olve reporting solutions.	22
Sharepoint System that contains records of network and systems changes for OCIO managed technology	10
Contains Security logs for network access	5

<p>1. The CobbleStone software solution is a SaaS eProcurement platform consisting of the Core System, the Vendor Client Gateway, and the Public Portal.</p> <p>a. The Core System is for internal use only by the Office of Contracts and consists of an eSourcing module and a Contracts module. The eSourcing module is where the Office of Contracts generates solicitation, tracks solicitations, and generate reports on the OCFO solicitations. The Contracts module is where the Office of Contracts create contract records, tracks contracts, and generate reports on the OCFO contracts.</p> <p>b. The Vendor Client Gateway is public facing and allows vendors to view and respond to the OCFO solicitations.</p> <p>c. The Public Portal is a public facing part that allows the public to view all OCFO awarded contracts.</p>	<p>11</p>
<p>Contains historical payroll information for DCPS employees prior to conversion to PeopleSoft.</p>	<p>26+</p>
<p>Contains data for Contractor and Employee onboarding and offboarding</p>	<p>5</p>
<p>Recorder of Deed enters land records data/scans incoming documents/handles cashiering</p>	<p>23+</p>
<p>Contains Access Control Data to internal systems and services</p>	<p>5</p>
<p>Contains outstanding Debts/Fees for DC</p>	<p>21</p>
<p>Tracks requests for budget authority establishments and modifications for federal, Medicaid payment, and private grants through the Office of Budget and Planning's approval process</p>	<p>3</p>
<p>Cloud applications for accounting (transactions including General Ledger, Projects, Grants, Budgets, Fixed Assets, Purchase Order and Invoices), reporting and budget execution</p>	<p>4</p>
<p>MFA Access for Servers and Desktops</p>	
<p>secure visitor management system</p>	

Online system to allow the public to submit FOIA requests to the OCFO. New cloud-based solution – Armedia	8
Emergency Notifications	2
This database supports an application that allows agency officials to order gift cards for their agency following the OFT approval process	3
Contains Geographic information for all the properties in DC	24+
Contains point of sale cash/check/credit card payments	21
Contains information of all the paper returns and payment checks that are scanned in the In-house scanning applications	9+
Budget and FTE information for budget year	2
Internal Control System (ICS) enables the OCFO to document and monitor control activities that mitigate risks and help the OFO to respond appropriately to significant business, operational, financial, compliance, and other risks to achieve its objectives.	3
Contains unclaimed property information	9
Contains Computer and Server Host Data and logs	5
Cybersecurity Training	6
Active Directory Auditing software	
Contains information on property Features collected in the field, which will be updated into CAMA	2
This database is the system of record for the District's Individual Income Tax, Business Taxes and Real property Taxes	11
This database contains Financial Disclosure data of all OCFO employees grade 13 or above	3

Contains agency specified information used in collaboration,	14
This database contains information needed to complete a PASF document and approval information	6
Contains Citi Bank and Wells Fargo monthly statements	8
Cloud-based asset management software	9
Office of Pay and Retirement services system holds data of District employees. Used to process and monitor time administration and retirement administration.	3
Contains historical payroll information for DC annuitants through FY13	40+
The database stores data to authenticate and authorize all .NET applications	3
Contains District financial accounting transactions	24
Server Alerting and Monitoring system that records availability and utilization statistics on OCFO technical infrastructure	16
System Activity Logs for Security Trails	3
vulnerability scanning and logging for internal systems	3
SaaS product used by OFT for processing payments through the banks as well as investments. Serves as payment hub for DIFS ACH payments.	4
Contains historical payroll information for non- CPS employees prior to conversion to PeopleSoft.	40+
OFT's daily reporting process to provide regular updates and tracking information to Grants Funds received in Wells Fargo BID accounts 23W and 27W	3

Date of most recent database upgrade	Date of planned upgrade (if applicable)	Is the database public? (Y/N)	If publicly accessible, where can it be accessed?
No upgrades occurred recently – Plan to Modernize in future with a capital project	N/A	N	
No plan to replace	Cloud / Subscription Service	N	
Will replace once Check Printing system is upgraded	N/A	N	
No plans to replace		N	
Will be retired in 2026	N/A	N	
No plans to replace		N	
Replaced by new CAMA system. Front End retired on 12/31/2019. Database is in query mode.	N/A	N	
Contract to be rebid in FY26.	N/A	N	
Continuous upgrade as managed service	Subscription service - as scheduled by vendor	N	
Contract reawarded in FY 2025	Subscription service - as scheduled by vendor	N	
Upgrading to 19c. Contains historical data following move to DIFS.	TBD	N	
Quarterly upgrades/enhancements are scheduled.	Quarterly	N	
No plan to replace		N	

FY 2025	FY 2026 - In the second quarter we will be doing a major upgrade to the user interface of the Vendor Client Gateway. Additionally, we're currently working on importing NIGP codes for reporting purposes.	Y	Overview
Used only for lookup of historical data. To be sunset.	N/A	N	
No plans to replace. Upgrading Windows server. Quarterly upgrades/enhancements are scheduled.	Quarterly	N	
Updated in 2020		Y	https://washington.d.c.publicsearch.us/
No plan to replace		N	
No plans to replace	N/A	N	
No plans to replace. Upgrading Windows server.		N	
Budgeting system receives monthly upgrades and accounting/reporting system receives quarterly upgrades. Budget formulation deployed in FY2026		Y	Supplier Portal ocfo
No plan to replace		N	
No plan to replace		N	

No plan to replace	Subscription service - as scheduled by vendor	Y	https://foia-ocfo.arkcase.com/foia/portal/new-request
No plan to replace	Cloud / Subscription Service	N	
No plan to replace		N	
No plans to replace		N	
Upgraded in FY2025	Annual upgrade	N	
Upgraded in FY 2022	N/A	N	
Replaced by new budget system/DIFS in FY2026. Remains online for contingency planning.	N/A	N	
No plans to replace	Upgrading Windows server -- date TBD	N	
No plans to replace	Subscription service - as scheduled by vendor	N	
	Plan to replace -- TBD	N	
No plan to replace	Cloud / Subscription Service	N	
No plans to replace		N	
No plans to replace		N	
Latest update completed on 09/30/2024		Y	mytax.dc.gov
No plans to replace	Upgrading Windows server -- date TBD	N	

No plans to replace		N	
	Quarterly	N	
No plan to replace	No upgrade scheduled	N	
Software as a Service, so upgrades are automatic	Subscription service - as scheduled by vendor	N	
	Upgrading Windows server -- date TBD	N	
Active accounts converted to PeopleSoft in FY2013	N/A	N	
	Upgrading Windows server -- date TBD	N	
Replaced by DIFS on 01-OCT-2022 at	N/A	N	
		N	
		N	
No plan to replace	Cloud / Subscription Service	N	
Contract reawarded in FY25.	Subscription service - as scheduled by vendor	N	
To be sunset.	N/A	N	
	Upgrading Windows server -- date TBD	N	

The public can utilize the Vendor Client Gateway and Public Portal.

Public searches are available through the Kofile website. Remainder of database not available to the public.

Accounting, reporting and budgeting not available to the public. Supplier portal is available for vendors and can be accessed at: Supplier Portal | ocfo

Response to the Question No. 31 of the Performance Oversight

The information below reflects the studies prepared, requested, and contracted during FY 2024 and FY 2025 to date.

Analysis	Purpose	Status
Unified Economic Development Budget Report FY2024	The Unified Economic Development Budget Report provides information on how economic development dollars were allocated in the District during the prior fiscal year, aggregated by type of incentive, granting body/agency, and ward.	<u>Completed</u>
Unified Economic Development Budget Report FY2025	The Unified Economic Development Budget Report provides information on how economic development dollars were allocated in the District during the prior fiscal year, aggregated by type of incentive, granting body/agency, and ward.	In progress

Projects and Publications

1 *Tax Rates and Tax Burdens in the District of Columbia: A Nationwide Comparison* (annual, pursuant to Public Law 93-407)

This report provides for the comparison of selected tax rates, as well as a comparison of household tax burdens in the District of Columbia with those in the largest city in each of the 50 States.

2 *Tax Rates and Tax Burdens: Washington Metropolitan Area* (annual, pursuant to Public Law 93-407)

This report provides a comparison of selected tax rates, as well as a comparison of household tax burdens in the District of Columbia with those of five neighboring jurisdictions.

3 *The Tax Expenditure report* (biennial, D.C. Law 13-161, the “Tax Expenditure Budget Review Act of 2000”), published in September 2024.

Provides for the estimates of revenue losses to the District resulting from federal and local tax provisions that grant special relief designed to encourage certain taxpayers' behavior or to aid taxpayers in special circumstances.

4 *District of Columbia Tax Expenditure Evaluation report* (annual) pursuant to Title VII, Subtitle N of the Fiscal Year 2015 Budget Support Act of 2014, provides for evaluations and *performances* of all tax expenditure projects in the District of

Columbia. In 2025, ORA evaluated its second five-year review of The Economic Development Tax Expenditure report. The Economic Development Tax Expenditure Review Report has been prepared and reviewed internally and now is in the process of being edited. Once, it is also reviewed and approved by the OCFO it will be available for publication. The anticipated publication date will be in Winter 2026.

Website: <https://ora-cfo.dc.gov/page/tax-expenditure-studies>

5 DC Economic Indicators (monthly)

Provides a monthly summary of all economic activities in the District of Columbia with the purpose of identifying underlying changes within those activities.

6 Cash Collection Reports (monthly)

It provides for the tracking of cash collections, by source, in the District of Columbia. These reports are critical in monitoring the performance of the District's revenue collections relative to the revenue estimates.

7 District of Columbia Economic and Revenue Trends (monthly).

Provides detailed information on changes in the national and local economies and necessary information regarding the underlying assumptions used in the preparation of Quarterly Revenue Estimates.

8 Quarterly Revenue Estimates.

Mandated by the Congress of the United States of America, quarterly revenue estimates provide for establishing annual budgets of the District of Columbia.

9 DC Tax Facts (annual)

Provides detailed data and information pertaining to the District's various tax structures, tax and non-tax rates, legal references, and other comparative tax data for the purpose of educating and enhancing citizens' awareness of their tax responsibilities.

10 Washington D.C.'s Tax System, A Visual Guide Report (annual)

Provides detailed graphical or visual representations and explanations of the District's various tax structures, tax distributions, and sources of revenue for the purpose of educating and enhancing citizens' awareness of their tax system as well as financial transparency.

11 Revenue Chapter of the D.C. Budget Book (annual)

It provides underlying assumptions pertaining to the preparation of the final revenue forecast for the District of Columbia during every fiscal year.

12 Fiscal Impact Studies

Routinely provides analyses of fiscal impacts of proposed legislation to ensure the integrity of the District's annual budget (approximately 123 reports during FY 2025).

13 District of Columbia Dedicated Taxes Revenue Report (biennial)

Provides a narrative of the 19 programs with earmarked tax revenues, along with a four-year revenue history and other background information on each fund.

14 Quarterly and Annual Reports to the U.S. Census Bureau

As part of the U.S. Census Bureau's *Quarterly Survey of State Government Tax Collections* program, ORA reports quarterly D.C. tax revenue information to the Census Bureau. The survey is a component of the Quarterly Summary of State and Local Government Tax Revenue, which is the only comprehensive source of quarterly information on the tax revenues of all state and local governments in the United States. This survey is authorized by Title 13, United States Code, Sections 161 and 182. The information collected serves as an integral part in developing the Gross Domestic Product – a key economic indicator produced by the Bureau of Economic Analysis. ORA also annually provides District fiscal year information to the Census Bureau as part of Census'

15 Annual Survey of State Government Tax Collections, as a part of the U.S. Census Bureau's requirement, this survey is the only comprehensive source of details on tax collections by type of tax imposed and collected by state governments in the United States.

16 D.C. Special Purpose Fund Revenue Certifications

As part of the District of Columbia Budget and Financial Plan's formulation process, ORA reviewed approximately 235 Special Purpose (O-type) funds during FY 2024, the agency provided projections of their Special Purpose fund non-tax revenue and fund balance use. Final ORA certifications are reported in the Revenue chapter of the Budget and Financial Plan. Throughout the year, after the District's Approved Budget and Financial Plan is submitted to the U.S. Congress, ORA typically reviews 35 to 50 agency requests for certification revisions. This is done in conjunction with an agency's request to OBP for revised Special Purpose fund budget authority.

Special Studies & Analyses

The Office of Revenue Analysis, as the main research-oriented body of the Office of the Chief Financial Officer, routinely prepares and responds to especial requests and conducts especial projects on behalf of the Office of the Mayor and/or the Council of the District of Columbia.

- Federal Downsizing and Unemployment: What the Data Shows for the District's Future (ORA blog April 2025)
- DC Unemployment Claims Tracker, a visual Dashboard (Federal and District/State)
- Women in DC's Homestead Market (ORA blog, October 2025)

Population and Demographic Changes in DC During and After Pandemic (ORA blog, December 2025)

Cited by

- Urban Turf [How DC's Population Changed During And After The Pandemic](#)
- WUSA9 [Population in DC shows signs of growth following pandemic, new study says | wusa9.com](#)
- District of Columbia Housing Purchase Assistance Program (HPAP) and Black Homeownership (in cooperation with *Howard University and Dr. Bethel Cole-Smith (formerly of Howard University)*), (December 2025)
- ORA Study: The Impact of an Increasing Housing Supply on Housing Prices (January 2020) -- Cited in Washington Post news story as an analysis of Bowser administration's push to increase new housing units in the city (November 25, 2025) <https://www.washingtonpost.com/dc-md-va/2025/11/25/bowser-dc-mayor-reelection/>
- ORA Study: Evaluating of Columbia TIF Projects 2002-2019: Project Cross-Subsidization Results in Net Fiscal Gains for the City (January 2020) -- Cited in WAMU news story on New Commanders Stadium at RFK (April 24, 2025). <https://wamu.org/story/25/04/24/dc-rfk-stadium-deal-commanders/>

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Contract Number	Contract Purpose - Description of Services	Competitive or Sole Source	Contract Type	Original Contract	Contract Term Begin Date	Contract Term End Date	Contract Period	Contract Period Total Amount	Budgeted Amount (as of 1/5/26)	Actual Amount Spent	Contract Status	Funding Source (local, federal, private, special revenue, specify if ARPA)	Notes
CFOPD-15-C-015	Telephony Call Center Upgrade & Maintenance Services	Non-Competitive/Sole Source	Firm Fixed Price	Base Period from 4/8/2015 to 4/7/2016	4/8/2025	4/7/2026	Option Year 4	\$ 202,817.04	\$ 8,575.74	\$ 2,691,971.85	Ongoing	Several (Include fund types in Notes)	Local and Special Purpose Revenue were used on this contract
				Base Period from 3/31/2023 to 3/30/2024								Ongoing	Several (Include fund types in Notes)
CFOPD-21-C-022	Capital Asset Management Software Solution	Competitive	Firm Fixed Price	Base Period from 4/6/2023 to 4/5/2024	3/31/2025	3/30/2026	Option Year 4	\$ 335,310.00	\$ -	\$ 1,318,731.10	Ongoing	Special Purpose Revenue (O-Type)	
												Ongoing	Special Purpose Revenue (O-Type)
CFOPD-23-C-002	Unclaimed Property Custody Services	Competitive	Requirements		4/6/2025	4/5/2026	Option Year 2	\$ 116,313.00	\$ 85,000.00	\$ 46,016.00	Ongoing		
CFOPD-23-A-043A	Real Estate Development Advisory Services	Competitive	Requirements	Base Period from 11/1/2023 to 10/31/2024	11/1/2025	10/31/2026	Option Year 2	\$ 100,000.00	\$ -	\$ -	Ongoing		
CFOPD-25-C-016	Single Audit Services	Competitive	Requirements	Base Period from 10/15/2025 to 10/14/2026	10/15/2025	10/14/2026	Base Year	\$ 902,181.00	\$ -	\$ -	Ongoing		
CFOPD-23-C-007	Preparation of Financial Statements for OPEB	Competitive	Indefinite Delivery Indefinite	Base Period from 4/12/2023 to 4/11/2024	11/18/2025	11/17/2026	Option Year 3	\$ 250,000.00	\$ 150,000.00	\$ 277,525.00	Ongoing	Special Purpose Revenue (O-Type)	
												Ongoing	Special Purpose Revenue (O-Type)
CFOPD-23-A-029	Bloomberg Subscription Services	Non-Competitive/Sole Source	Firm Fixed Price		4/12/2025	4/11/2026	Option Year 2	\$ 113,280.00	\$ 52,315.40	\$ 247,374.12	Ongoing		
CFOPD-23-A-030	Bloomberg FIT Tradebook	Non-Competitive/Sole Source	Requirements	Base Period from 6/12/2023 to 6/11/2024	6/12/2025	6/11/2026	Option Year 2	\$ -	\$ -	\$ -	Ongoing	Special Purpose Revenue (O-Type)	
				Base Period from 12/16/2022 to 12/15/2023							Ongoing	Special Purpose Revenue (O-Type)	
CFOPD-23-C-011	Physical Property Inventory	Competitive	Firm Fixed Price		12/16/2025	12/15/2026	Option Year 3	\$ 220,960.00	\$ 174,926.67	\$ 510,280.00	Ongoing	Local	
CFOPD-23-C-032	Canon Printers with Videk Upgrade	Non-Competitive/Sole Source	Firm Fixed Price	Base Period from 8/10/2023 to 8/9/2024	8/10/2025	8/9/2026	Option Year 2	\$ 153,363.76	\$ 81,240.13	\$ 349,998.30	Ongoing	Enterprise	Capital Funded
CFOPD-25-A-032	AWS Cloud Contact Center (CCaaS)	Non-Competitive/Sole Source	Requirements	Base Period from 7/17/2025 to 7/16/2026	7/17/2025	7/16/2026	Base Year	\$ 588,637.06	\$ 469,610.56	\$ 119,026.50	Ongoing	Several (Include fund types in Notes)	Local, Intra-District (Pre-FY23), Special Purpose Revenue
CFOPD-17-C-009	Merchant Processing Services	Competitive	Requirements	Base Period from 12/9/2022 to 9/30/2023	5/19/2024	5/18/2026	Option Year 3	\$ 18,000,000.00	\$ -	\$ 34,215,289.86	Ongoing	Special Purpose Revenue (O-Type)	
												Ongoing	Special Purpose Revenue (O-Type)
CFOPD-23-C-013	Actuarial Services	Competitive	Requirements	Base Period from 1/21/2011 to 1/26/2016	10/1/2025	9/30/2026	Option Year 3	\$ 66,500.00	\$ 66,500.00	\$ 123,000.00	Ongoing	Special Purpose Revenue (O-Type)	
												Ongoing	Special Purpose Revenue (O-Type)
CFOPD-11-C-023	Comprehensive Banking Services	Competitive	Requirements		1/20/2021	1/19/2026	Option Year 2	\$ 3,450,000.00	\$ 194,606.53	\$ 7,856,761.67	Ongoing	Local	
CFOPD-25-C-003	Investment Analytic Services	Competitive	Requirements	Base Period from 6/2/2025 to 6/1/2026	6/2/2025	6/1/2026	Base Year	\$ 250,000.00	\$ 68,103.48	\$ 11,896.52	Ongoing	Local	
CFOPD-23-A-043B	Real Estate Development Advisory Services	Competitive	Requirements	Base Period from 11/1/2023 to 10/31/2024	11/1/2025	10/31/2026	Option Year 2	\$ 100,000.00	\$ -	\$ -	Ongoing	Local	
CFOPD-23-C-009	Commercial Real Estate Data & Subscription Services	Competitive	Firm Fixed Price	Base Period from 3/1/2023 to 2/29/2024	3/1/2025	2/28/2026	Option Year 2	\$ 196,162.56	\$ -	\$ 610,684.68	Ongoing	Local	FY26 term is fully invoiced
CFOPD-24-C-044	Informatica Support & Maintenance	Competitive	Firm Fixed Price	Base Period from 10/1/2024 to 9/30/2025	10/1/2025	9/30/2026	Option Year 1	\$ 65,522.62	\$ -	\$ 131,045.24	Ongoing	Local	FY26 term is fully invoiced
CFOPD-23-A-043C	Real Estate Development Advisory Services	Competitive	Requirements	Base Period from 11/1/2023 to 10/31/2024	11/1/2025	10/31/2026	Option Year 2	\$ 100,000.00	\$ -	\$ -	Ongoing	Several (Include fund types in Notes)	Local, Federal, Intra-District (Pre-FY23)
CFOPD-21-C-035	eWIC Processing Services	Non-Competitive/Sole Source	Firm Fixed Price		8/30/2025	8/29/2026	Option Year 4	\$ 227,860.66	\$ -	\$ 865,634.05	Ongoing		
CFOPD-24-A-012	Dell NASPO ValuePoint Cooperative Agreement	Non-Competitive/Sole Source	Requirements	Base Period from 7/1/2024 to 6/30/2025	7/1/2025	6/30/2026	Option Year 1	\$ -	\$ -	\$ -	Ongoing	Several (Include fund types in Notes)	Capital and Local
				Base Period from 5/31/2019 to 5/30/2020							Ongoing	Several (Include fund types in Notes)	Capital and Local
CFOPD-19-C-038	Oracle Financials Cloud & PCBS	Competitive	Firm Fixed Price		5/31/2025	5/30/2026	Option Year 6	\$ 4,393,868.24	\$ 5,571,781.03	\$ 20,382,170.27	Ongoing	Local	FY26 term is fully invoiced
CFOPD-25-C-037	SAS/Data Flux Maintenance and License Support Services	Non-Competitive/Sole Source	Firm Fixed Price	Base Period from 10/1/2025 to 9/30/2026	10/1/2025	9/30/2026	Base Year	\$ 111,318.39	\$ -	\$ 111,318.39	Ongoing	Local	FY26 term is fully invoiced
CFOPD-21-C-003	Integrated Data Capture Services	Non-Competitive/Sole Source	Firm Fixed Price	Base Period from 3/31/2021 to 3/30/2022	3/31/2025	3/30/2026	Option Year 3	\$ 201,751.00	\$ -	\$ 1,029,809.00	Ongoing	Several (Include fund types in Notes)	Local and Capital Funds were used on this contract
CFOPD-21-C-001	GenTax Maintenance & Support	Non-Competitive/Sole Source	Requirements	Base Period from 6/1/2020 to 5/31/2024	7/1/2025	6/30/2026	Option Year 4	\$ 9,333,579.65	\$ -	\$ 39,948,471.63	Ongoing	Several (Include fund types in Notes)	Local and Special Purpose Revenue were used on this contract
												Ongoing	Several (Include fund types in Notes)
CFOPD-20-C-014	Electronic Benefits Transfer (EBT) Services	Competitive	Requirements		6/1/2024	5/31/2026	Option Year 1	\$ 5,810,473.40	\$ 2,032,217.08	\$ 11,605,782.64	Ongoing	Local	
CFOPD-21-C-018	IT Research Services	Competitive	Firm Fixed Price	Base Period from 4/7/2021 to 4/6/2022	4/7/2025	4/6/2026	Option Year 4	\$ 99,374.91	\$ -	\$ 392,838.72	Ongoing	Local	
CFOPD-24-A-024	Goldman Sachs Electronic Access	Non-Competitive/Sole Source	Firm Fixed Price	Base Period from 7/1/2024 to 6/30/2025	7/1/2025	6/30/2026	Option Year 1	\$ -	\$ -	\$ -	Ongoing	Special Purpose Revenue (O-Type)	
				Base Period from 3/15/2025 to 3/14/2026							Ongoing	Local	
CFOPD-25-C-009	Data Warehousing and Maintenance	Non-Competitive/Sole Source	Requirements		3/15/2025	3/14/2026	Base Year	\$ 249,163.33	\$ 73,283.33	\$ 175,880.00	Ongoing	Local	
CFOPD-26-A-017	GPO Printing Services	Non-Competitive/Sole Source	Firm Fixed Price	Base Period from 11/11/2025 to 11/10/2026	11/11/2025	11/10/2026	Base Year	\$ 200,000.00	\$ 200,000.00		Ongoing	Local	