

Jerome Shelton
6504 North Capitol Street NW
Washington, DC 20012
January 6, 2020

Chairman Phil Mendelson
Council of the District of Columbia
1350 Pennsylvania Avenue NW
Washington, DC 20004

1. Please provide a copy of the Financial Disclosure Statement you filed with the Office of Campaign Finance or the Board of Ethics and Government Accountability. If you have not filed a Financial Disclosure Statement, please provide answers to questions 2-8 in lieu of that statement.

Please see attached.

2. Please provide the name of each business entity transacting any business with the District Government in which you have a beneficial interest valued in excess of \$5,000, including publicly traded stock.

None.

3. Please provide the name of each business entity transacting any business (including consulting) with the District Government from which you or your immediate family have received (or are receiving) income for services rendered in excess of \$1,000 during the past two years.

Office of the State Superintendent, GED testing office, and Pathway Consultant.

4. Please provide the name of each business entity transacting business with the District Government in which you or any member of your immediate family serves as an officer, director, partner, or agent. Also list the position(s) held, a brief description of the entity, and any other pertinent details.

District of Columbia Teachers Federal Credit Union, Board Chairman. A financial institution supplying financial services and scholarships for Education Employees and their families.

Friends of the Health and Human Services Academy (Business Advisory Council) for Eastern Senior High School, serving as treasurer. Business Advisory Council providing financial support and scholarships for Eastern Senior High School's Health Academy.

Reslyn Woodruff Henley Memorial Awards Committee, Secretary, Oldest Continuous Award at the University of the District of Columbia donates five hundred dollars (\$500) annually to the Athletic Department.

5. Please provide the name of any lender and the amount of liability for each outstanding liability borrowed by you or any member of your immediate family in excess of \$5,000. Do not include loans from a federal or state insured or regulated financial institution, or from any business enterprise regularly engaged in the business of providing revolving credit or installment accounts.

None.

6. Please list the location of all real property located in the District of Columbia in which you have an interest with a fair market value in excess of \$5,000.

6504 North Capitol Street, NW, Washington, DC 20012.

7. Please list all professional and occupational licenses held by you.

Pearson Vue Certified Test Administrator.

8. Please list any professional organizations of which you are currently a member.

Included in answers provided.

9. Please list all boards and commissions connected with the District government on which you are or have been a member, and include the term of service for each.

The University of the District of Columbia, Alumni Trustee, 2010-present.

The University of the District of Columbia Athletic Hall of Fame, Chairman since 2012.

10. Please list any other boards (e.g. Boards of Directors of a non-profit) on which you are a member.

District of Columbia Teachers Federal Credit Union, Director, since March 1979.

Reslyn Woodruff Henley Memorial Awards Committee, Secretary, Member since 2000.

11. Do you have any outstanding liability for taxes, fees, or other payments to the District, federal, or other state or local governments, either contested or uncontested? If so, please provide documentation of attempts to pay the amount owed or to resolve the disputed claim.

None.

12. Do you or any member of your immediate family have any interest, financial or otherwise, that may directly or indirectly pose a conflict of interest for you in performance of your duties as an UDC Board of Trustees member?

None.

13. Please describe any local political activity (i.e. the District of Columbia local elections or campaigns) that you have engaged in over the past five years, including any campaign contributions to a local candidate or political action committee.

Kinlow Ward 8 Strong, \$100

Re-Elect Brandon Todd for Ward 4, \$100

14. Are you registered with any local, state, or federal government to lobby? If so, list the jurisdiction(s) in which you are registered.

None.

15. Please describe your current role, including a description of any committees you may chair or of which you are a member. Given that you currently sit on UDC's Board of Trustees on behalf of the alumni, do you see your role changing with this appointment, and if yes, how?

As an Elected Alumni Representative to the Board of Trustees for the University of the District of Columbia, I currently serve on the Operations Committee as chair, the Audit Budget and Finance Committee, the Community College Committee, and the Alumni Task Force.

I have also served as Board Treasurer and have attempted to attend all committee meetings averaging a reported ninety-seven percent (97%) attendance.

As the elected Alumni representative I serve as liaison for the Board of Trustees to our alumni by sharing the Board's public actions, invitations to, and information about, upcoming events. My expectation of this new role is to support to represent all supporters of the University, increase community and alumni economic support, and to create the best possible education system of and for the citizens of District of Columbia.

16. (a) What do you see as the top five priorities for the University, and how do you see the Board facilitating each of these priorities?

#1. Completion of clear pathways for workforce development.

- #2. Completion of computer system enhancements to support a living cloud-based University. This will allow for a more individualized, knowledge-based platform for students.**
- #3. Facilities improvement (heating, plumbing & air conditioning)**
- #4. Classrooms and facilities brought online for true twenty-first century University instruction.**
- #5. Increase University communication with alumni that is focused on increasing contributions to reduce enrollment costs.**

(b) What is your vision for UDC over the next five years? Include in your answer what you believe should be the relationship between the Flagship and the Community College.

Over the next five years, our University system will continue to plan clear pathways for all who seek enrollment. By uniting as one system, the Board has reduced barriers to continuing education and is able to use all of the educational abilities offered by service delivery systems. I will continue the Board's plans for future facilities needs at Van Ness, Backus, and Old Congress Heights, along with the decision to build at 801 N. Capitol Street, NE. The Board must continue to create options for student housing at or near a campus center. I plan to continue to fulfill my role as an education resource for our preschool to grade 12 city schools, including all District, and federal agencies focused on providing education for the evolving needs of our community.

17. What is your strategy for increasing enrollment and retention at UDC, including at the flagship, the Community College, and the workforce development and lifelong learning programs.

Over the past five years, the Board has put in place three competency-based strategies that I am confident will increase enrollment and retention rates at every level. The Board has reprogrammed our enrollment staff, identified our candidate pools, continuously added to our list of key contacts, and documented our real time contacts with all who express a desire to enroll. Next, the Board is adapting the student services retention plan via the creation of student cohorts. The third strategy includes the Board's selection of our President and his ability to include, and communicate openly with, the Mayor's office, our City Council, and with the University Community. Open communication and transparency attracts more students to enroll.

18. What steps do you think the University should take to increase private fundraising?

The Board has committed to three steps to improve fundraising: improve the communication with our Foundation, via a Vice President for Advancement; appoint a Director of Alumni Affairs and Outreach; and provide funding for a multimedia communication campaign. There is also a campaign to communicate with alumni and organizations with clear goals and monitoring. Reaching potential donors by telling our truths and stories greatly assists with private funding.

19. The University has several capital projects that it needs to complete but has limited funding to do so. What are your priorities with regard to the University's capital projects?

The Board has documented our plan for capital improvements and I will work to ensure that the plan is implemented.

FDS Filing Details for 2018

Name: Jerome Shelton

Date of Appointment or Employment: 5/15/2010

Final Date of Service: 5/4/2018

Position: Board Member

Agency: University of the District of Columbia

Position Held with the District Government During the Prior calendar year (If Not The Same As Above)

Position:

Final Date in Position:

Agency:

Non District Employment/Business

1) Did you have any non-District employment or engage in any outside business during the previous calendar year for which you received compensation of \$200 or more?

No

2) Was your spouse, registered domestic partner, or dependent child(ren) employed by a private entity or did they engage in any business endeavors during the previous calendar year for which they received compensation of \$200 or more?

No

3) Did you serve in any unpaid position (without compensation) as an officer, director, partner, consultant, contractor, volunteer, member or any other fiduciary capacity of a non-government board or other outside entity during the previous calendar year?

Position / Title	Name of Entity	Start Date	End Date
Chairman of Board	DC Teachers' Federal Credit Union	03/28/2018	03/27/2019
Member/Treasurer	Friends of the Health and Human Services Academy (BAC) Eastern High School	2/9/2018	

4) Did your spouse, registered domestic partner, or dependent child(ren) serve in any unpaid position (without compensation) as an officer, director, partner, consultant, contractor, volunteer, member or any other fiduciary capacity of a non-government board or other outside entity during the previous calendar year?

No

5) During the previous calendar year, did you have any agreements with a former or current employer, other than with the District of Columbia, for future payments or benefits (such as separation pay, partnership buyouts, or pension or retirement pay) or for future employment or for a leave of absence?

Former/Current Employer	Type of Agreement or Benefit
Prince Georges County Public School	Retirement

6) During the previous calendar year, did your spouse, registered domestic partner, or dependent child(ren) have any agreements with a former or current employer, other than with the District of Columbia, for future payments or benefits (such as separation pay, partnership buyouts, or pension or retirement pay) or for future employment or for a leave of absence?

Former/Current Employer	Type of Agreement or Benefit
Howard University	Retirement

Securities, Holdings and Investments

7) Did you have a beneficial interest in or hold any security ("security" means stocks (any class), bonds (including savings bonds and tax exempt bonds), stock options, warrants, debentures, obligations, notes (not mortgage notes), mortgages (not on one's home), investment interests in limited partnerships, REITs, and such other evidences of indebtedness and certificates of interest or participation in any profit-sharing agreement as are usually referred to as securities) at the close of the previous calendar year that exceeded in the aggregate \$1,000 or that produced income of \$200 or more?

No

8) Did your spouse, registered domestic partner, or dependent child(ren) have a beneficial interest or hold any security ("security" means stocks (any class), bonds (including savings bonds and tax exempt bonds), stock options, warrants, debentures, obligations, notes (not mortgage notes), mortgages (not on one's home), investment interests in limited partnerships, REITs, and such other evidences of indebtedness and certificates of interest or participation in any profit-sharing agreement as are usually referred to as securities) at the close of the previous calendar year that exceeded in the aggregate \$1,000 or that produced income of \$200 or more?

No

9) Did you owe any entity or person (other than a member of your immediate family) \$1,000 or more, (excluding: mortgages on your personal residence, student loans, automobile loans, credit card accounts or other revolving credit, and other loans from a federal or state insured or regulated financial institution), during the previous calendar year?

No

10) Did your spouse, domestic partner or dependent child(ren) owe any entity or person (other than a member of their immediate family) \$1,000 or more, (excluding: mortgages on personal residences, student loans, automobile loans, credit card accounts or other revolving credit, and other loans from a federal or state insured or regulated financial institution), during the previous calendar year?

No

11) Did you have an interest in any real property located in the District during the previous calendar year, aside from personal residences occupied by you, your spouse or your domestic partner, where your interest had a fair market value of more than \$1,000, or where the property produced income of \$200 or more?

No

12) Did your spouse, domestic partner, or dependent child(ren) have an interest in any real property located in the District during the previous calendar year, aside from personal residences occupied by you, your spouse or your domestic partner, where their interest had a fair market value of more than \$1,000, or where the property produced income of \$200 or more?

No

Regulated Professions

13) Do you hold any professional or occupational licenses issued by the District of Columbia government (i.e., are you licensed to practice law in the District of Columbia, or are you licensed by the District's Department of Health, the District's Department of Consumer and Regulatory Affairs, the District's Department of Mental Health, the District's Department of Insurance Securities and Banking, the Metropolitan Police Department, the District's Occupational and Professional Licensing Administration, etc.)?

No

14) Does your spouse, domestic partner, or dependent child(ren) hold any professional or occupational licenses issued by the District of Columbia government (i.e., are they licensed to practice law in the District of Columbia, or are they licensed by the District's Department of Health, the District's Department of Consumer and Regulatory Affairs, the District's Department of Mental Health, the District's Department of Insurance Securities and Banking, the Metropolitan Police Department, or the District's Occupational and Professional Licensing Administration, etc.)?

Type of License Issued	Issuing Entity
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Social Worker

DC Government

Gifts

15) Did you receive any gift(s) (Gift is defined as a payment, subscription, advance, forbearance, rendering, or deposit of money, services, or anything of value, unless consideration of equal or greater value is received) from any person that has or is seeking to do business with the District, conducts operations or activities that are regulated by the District, or has an interest that may be favorably affected by the performance or nonperformance of your duties in the total amount or with a total value of \$100 or more during the previous calendar year?

No

Additional Comments

I work part time for OSSE GED Testing Center as a Test Administrator

Supporting Documents

I certify that I have:

- Not caused title to property to be placed in another person or entity for the purpose of avoiding the disclosure requirements on the preceding form;
- Filed and paid my income and property taxes;
- Diligently safeguarded the assets of the taxpayers and the District;
- Reported known illegal activity, including attempted bribes, to the appropriate authorities;
- Not been offered or accepted any bribes;
- Not directly or indirectly received government funds through illegal or improper means;
- Not raised or received funds in violation of federal or District law; and
- Not received or been given anything of value, including a gift, favor, service, loan gratuity, discount, hospitality, political contribution, or promise of future employment, based on any understanding that my official actions or judgment or vote would be influenced.

Additional Comments

Please notify if there are further answers needed