



Agency/Organization	Number of Slots
Administrative Conference of the United States	1
Advisory Council on Historic Preservation	1
African Development Fund	1
Appalachian Regional Commission	1
Central Intelligence Agency	1
Chemical Safety and Hazard Investigation Board	1
Commodity Futures Trading Commission	1
Consumer Financial Protection Bureau	1
Consumer Product Safety Commission	1
Corporation for National and Community Service	1
Council of Economic Advisers	1
Council on Environmental Quality	1
Court Services and Offender Supervision Agency for the District of Columbia	1
Defense Nuclear Facilities Safety Board	1
Delta Regional Authority	1
Election Assistance Commission	1
Equal Employment Opportunity Commission	1
Export-Import Bank of the United States	1
Farm Credit Administration	1
Federal Communications Commission	1
Federal Election Commission	1
Federal Energy Regulatory Commission	1
Federal Housing Finance Agency	1
Federal Labor Relations Authority	1
Federal Maritime Commission	1
Federal Mediation and Conciliation Service	1
Federal Mine Safety and Health Review Commission	1
Federal Retirement Thrift Investment Board	1
General Services Administration	1
Institute of Museum and Library Services	1
Inter-American Foundation	1
International Joint Commission	1
Marine Mammal Commission	1
Merit Systems Protection Board	1
Millennium Challenge Corporation	1
Udall Foundation	1
National Aeronautics and Space Administration	1
National Archives and Records Administration	1
National Credit Union Administration	1
National Endowment for the Arts	1

National Endowment for the Humanities	1
National Labor Relations Board	1
National Mediation Board	1
National Science Foundation	1
National Transportation Safety Board	1
Northern Border Regional Commission	1
Northern Great Plains Regional Authority	1
Nuclear Regulatory Commission	1
Occupational Safety and Health Review Commission	1
Office of Management and Budget	1
Office of National Drug Control Policy	1
Office of Personnel Management	1
Office of Science and Technology Policy	1
Office of Special Counsel	1
Office of the Director of National Intelligence	1
Office of the Intellectual Property Enforcement Coordinator	1
Office of the National Cyber Director	1
Office of the U.S. Trade Representative	1
Peace Corps	1
Pension Benefit Guaranty Corporation	1
Postal Regulatory Commission	1
Privacy and Civil Liberties Oversight Board	1
Public Buildings Reform Board	1
Railroad Retirement Board	1
Securities and Exchange Commission	1
Small Business Administration	1
Social Security Administration	1
Southeast Crescent Regional Commission	1
Southwest Border Regional Commission	1
State Justice Institute	1
Surface Transportation Board	1
Tennessee Valley Authority	1
U.S. Agency for Global Media	1
U.S. International Development Finance Corporation	1
U.S. International Trade Commission	1
U.S. Trade and Development Agency	1
U.S. Postal Service	1

Election Readiness Monthly Meeting

1/8/2025

AGENDA

A. Status updates/upcoming milestones/roadblocks

a. Post-Election, Pre-Inauguration

i. Participation

1. ATDC – daily (aware receiving reports. Focus on Day 1 employees)
2. ABC
3. Partnership – ATR on 1/15/25
4. CHCO Meeting – 1/14/25

ii. Nominee Reports

1. 12.27 - First report released to OGE
2. Status Meetings -
3. Nominee Data Charts – averaged days, first round (election readiness to inauguration?)

iii. Integrity (Diana/Tracy)

1. Entity Set-Up in Integrity
2. Integrity 101 Training provided on 12/30 . Next step – sign the mou needed to set up entity within OGE. Multiple reminders

iv. Communication

1. Ethics Officials

- a. Email from David – 1.8

2. Transition Team

- a. Meeting held with PTT on 1.7, 1.8
- b. Multiple reminders on signing WH/OVP/NSC MOU
- c. Email to PTT 1.8 - Establishing WH Ethics Program. ATDC confirmed S.Gast is POC

3. Congress

v. Outstanding issues/pending with the transition team

1. Ethics Policy Decisions related nominee
2. DOJ/State PPO – administrative decision

vi. Press (Liz H.)

vii. Resources (Nicole)

1. Job Aids (503, 209, Confidential Clients) - published to IEG
2. Onboarding Checklist for PAS (developed as part of training)

viii. Guidance (Seth)

1. Pay threshold LA Published 1/7/2025
2. CNC Outside Earned Income Limitations LA (w/GC) Publish by 1/30/25
3. Spousal Assets LA (w/ Director – briefing being scheduled 1/15)

B. WHO/OVP Ethics Program (establishing)

- a. [outline](#) created of support OGE can provide

C. WH/OVP Ethics Program (sunsetting)

- a. WH/NARA
- b. Annual Questionnaire
- c. Term Reports
 - i. President/VP Term Report – IFDB will review. Timing of certification
 - ii. IFDB pre-reviewed WH reports
- d. Post-Employment Advice – WH is engaging with OA about serving as a POC

D. Reminders

- a. Update the [Excel Workbook](#)

Election Readiness Monthly Meeting

1/14/2025

AGENDA

A. Status updates/upcoming milestones/roadblocks

- a. Post-Election, Pre-Inauguration
 - i. Participation
 - 1. ATDC – daily (aware receiving reports. Focus on Day 1 employees)
 - 2. ABC
 - 3. Partnership – ATR on 1/15/25
 - 4. CHCO Meeting – 1/14/25
 - ii. Nominee Reports
 - 1. Status
 - 2. Nominee Data Charts –published on 1/8, 1/13, next 1/15
 - iii. *Integrity* (Diana/Tracy)
 - 1. WH/OVP/NSC - Submitted MOU
 - iv. Communication/Outstanding Issues
 - 1. Ethics Officials
 - a. Email from Director to Cabinet & other agencies with pending nominees sent 1.8
 - b. DAEO Meeting on 1.28
 - 2. Transition Team
 - a. Email to PTT 1.8 - Establishing WH Ethics Program. ATDC confirmed S.Gast is POC
 - b. Outstanding Issues: Ethics Policy Decisions related nominee
 - 3. Congress
 - v. Press (Liz H.)
 - vi. Guidance (Seth)
 - 1. CNC Outside Earned Income Limitations LA (w/GC) Publish by 1/30/25
 - 2. Spousal Assets LA (w/ Director – briefing being scheduled 1/15)

B. WHO/OVP Ethics Program (establishing)

- a. [outline](#) created of support OGE can provide

C. WH/OVP Ethics Program (sunsetting)

- a. WH/NARA
- b. Annual Questionnaire
 - i. WH/OVP Submitted
 - ii. NSC not submitted
- c. Term Reports
 - i. President/VP Term Report – IFDB will review. Timing of certification
 - ii. IFDB pre-reviewed WH reports
- d. Post-Employment Advice – WH is engaging with OA about serving as a POC

D. Reminders

- a. Update the [Excel Workbook](#)

Election Readiness Monthly Meeting

5/21/2024

AGENDA

- A. Partner **Status updates/upcoming milestones/roadblocks**
 - a. Pre-Election
 - i. Participation (Shelley)
 - 1. ATDC Meeting: 4/29 (Core), 5/29 (1st full council)
 - 2. Partnership Roundtables Kick Off: 5/7
 - 3. Six Month Report transmitted to Congress: 5/3
 - 4. GCX: 5/22
 - 5. Partnership Roundtable: 6/21
 - ii. Internal Training (Deb/Seth)
 - iii. External Training (Nicole)
 - 1. Other Topics (Nicole)
 - a. June 5 (nom approach, 203/205, hatch act, vacancies act) - 170, 450 (virtual)
 - b. Website, 278 Debrief, Social Media, Records, Issue Spotting, Communicating with Leaders, Seeking Employment Debrief, P2P: Departing Employees, Pledge – Post Employment, Political Conversions, Program Review,
 - 2. Nominee – Fall (September – 6 weeks) (Deb)
 - iv. Resources (Deb/Heather)
 - 1. PFD Guide – completed!
 - 2. PAS Position List – ethics official review (April/May)
 - a. Target Release:
 - 3. Transition Guide – w/Tiffany
 - a. Target Release: June
 - b. Comms Plan
 - 4. EA Guide – w/Deb
 - a. Design: Cover Page (With Tiffany)
 - b. Target Release:
 - 5. Nominee Guide – w/Heather
 - a. Design: Partial
 - b. Target Release: June
 - 6. Campaign Briefing – extracting relevant portions
 - 7. One Pager – ways OGE can support a transition
 - v. Guidance (Seth)
 - 1. Nom Philosophy - published
 - 2. Managed Account – published
 - 3. 203/205 Advisories
 - a. Fiduciaries - Published
 - b. Issues affecting incoming employees w/OLC
 - 4. Thematic Funds - w/ELPB

- 5. Incoming employees from State and Local, recusal obligations – w/Shelley
- vi. *Integrity* (Diana)
 - 1. systems upgrades/enhancements related to nominee – working w/PNB
 - 2. Update Materials
 - 3. Create campaign structure
- vii. Candidates – May 15th Candidate Report - VP after.

B. **Reminders**

- a. Update the [Excel Workbook](#)

C. **WH/OVP Ethics Program (sunsetting)**

Election Readiness Monthly Meeting

6/27/2024

AGENDA

- A. Partner **Status updates/upcoming milestones/roadblocks**
 - a. Pre-Election
 - i. Participation (Shelley)
 - 1. ATDC: 6/25/24; next 7/30/24 (new community page for posting)
 - 2. Small/independent ATDC: 6/24/24
 - 3. 3 Month Report to Congress transmitted to GSA (due August 5, 2024)
 - 4. GCX: Session held 5/22/24
 - 5. Partnership Roundtable: Panel presentation 7/26/24
 - ii. Internal Training (Deb/Seth)
 - iii. External Training (Nicole)
 - 1. Other Topics (Nicole) Upcoming: Records, Communicating with Leaders, Seeking Employment Debrief, P2P: Departing Employees, Pledge – Post Employment, Political Conversions,
 - 2. Nominee – Fall (September – 6 weeks) (Deb)
 - a. Coordinate w/Patrick (recorded)
 - iv. Resources (Deb/Heather)
 - 1. PFD Guide – completed!
 - 2. PAS Position List – f/u w/State and Proofreading
 - a. Target Release: July
 - 3. Transition Guide – reviewed by Stephanie. Final design edits w/Tiffany
 - a. Target Release: July
 - b. Comms Plan
 - 4. Nominee Guide – w/Tiffany
 - a. Target Release: July
 - 5. EA Guide – w/Deb & Dave
 - a. Design- Cover Page (With Tiffany)
 - b. Target Release:
 - 6. Campaign Briefing – (b)(5) - deliberative/predecisional
 - a. One Pager – ways OGE can support a transition
 - v. Guidance (Seth)
 - 1. Nom Philosophy - published
 - 2. Managed Account – published
 - 3. Incoming employees from State and Local, recusal obligations – published
 - 4. 203/205 Advisories
 - a. Fiduciaries - Published
 - b. Issues affecting incoming employees - back w/OGE
 - 5. Thematic Funds - w/agencies

- vi. *Integrity* (Diana)
 - 1. systems upgrades/enhancements related to nominee – working w/PNB
 - 2. Update materials
 - 3. Create campaign structure
- vii. Candidates – May 15th Candidate Report - VP after.

B. Reminders

- a. Update the [..\election readiness \(2024\).xlsx](#)

C. WH/OVP Ethics Program (sunsetting)

Build out Fall Agenda/Action Items

Election Readiness Monthly Meeting

7/31/2024

AGENDA

A. Status updates/upcoming milestones/roadblocks

a. Pre-Election

i. Participation (Shelley)

1. ATDC: 6/25/24; 7/30/24 (slides + new community page for posting)
2. Small/independent ATDC: 6/24/24; 8/1/24
3. 3 Month Report to Congress transmitted to GSA (due August 5, 2024)
4. GCX: Session done
5. Partnership Roundtable: Panel presentation 7/26/24; 9/4/24
6. Need to do outreach to candidates for briefing

ii. Internal Training (Deb/Seth)

iii. External Training (Nicole)

1. Other Topics (Nicole) Upcoming: Seeking Employment Debrief, P2P: Departing Employees, Pledge – Post Employment
2. Nominee – Fall (September – 6 weeks) (Deb)
 - a. Coordinate w/Patrick (recorded)
 - b. Registration sent (7/31)

iv. Resources (Deb/Heather)

1. PFD Guide – completed!
2. PAS Position List – released
3. Transition Guide – reviewed by Stephanie. Final design edits w/Tiffany
 - a. Target Release: July
 - b. Comms Plan
4. Nominee Guide – w/Tiffany
 - a. Target Release: August
5. EA Guide – w/Deb & Dave
 - a. Design- Cover Page (completed)
 - b. Target Release:
6. Ways OGE Can Help - published 7/30

v. Guidance (Seth)

1. 203/205 Advisories
 - a. Fiduciaries - Published
 - b. Issues affecting incoming employees – full draft (w/OGE)
2. Thematic Funds – agencies reviewed full draft - w/OGE
3. Transition Teams – full draft w/C-ELPB
4. Inaugural Events – To be assigned
5. Nom Philosophy - published
6. Managed Account – published
7. Incoming employees from State and Local, recusal obligations – published
8. 207 Senior Employee Pay LA – Published

- vi. *Integrity* (Diana)
 - 1. systems upgrades/enhancements related to nominee – working w/PNB
 - 2. Update materials
 - 3. Create campaign structure
- vii. Compliance Division
 - 1. Updated EA Compliance Form – expected release in
- viii. Candidates
- ix. Campaign
 - 1. Initial Briefing (Shelley)
 - a. Objective/Talking Points:
 - 2. Second Briefing (Shelley, Dave, Deb, Heather)
 - a. Objective/Talking Points: (b)(5) - deliberative/predecisional
 - b. Materials to send after: Road Map and One Pager – ways OGE can support a transition
 - 3. Initial Integrity Briefing (Shelley, Diana, Tracy, PNB Rep)
- B. Other
 - a. Termination Reports
 - b. Desk Officer Re-assignments – finalize plan in October?
- C. OGE
 - a. Certify Succession Plan due: 9/15 (OMB memo with instructions)
 - b. Certify November 1st – Briefing Materials
 - i. Profile Book – w/Grant for update
 - ii. One Pagers
 - c. Agency Review Teams
 - i. Sign NDAs
- D. **WH/OVP Ethics Program (sunsetting)**
 - 1. Dave spoke with WH
 - 2. AQ Reminder - Nicole will send with word draft of AQ
- E. **WH/OVP Ethics Program (set-up)**
- F. **Ethics Pledge**
 - a. Guidance

Scenario Planning

Election Readiness Monthly Meeting

8/29/2024

AGENDA

A. Status updates/upcoming milestones/roadblocks

a. Pre-Election

i. Participation (Shelley)

1. ATDC: 8/27/24 (slides shared with ethics officials)
2. Small/independent ATDC: 8/29/24
3. 3 Month Report to Congress transmitted
4. GCX discussion again in September
5. Partnership Roundtable: Panel presentation 9/4/24
6. GSA coordinating initial service provider briefing (will ask to schedule longer nom briefing and to identify Integrity trainees)

ii. Internal Training (Deb/Seth)

1. One group working on a hard exercise with Heather and Joyce
2. One newer reviewer group working on an exercise with Jack and Lorna.
2. Coordinated back ups for CD Program Manager

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iii. External Training (Nicole)

1. Other Topics (Nicole) Upcoming: Pledge – Post Employment; Incoming Leadership (October); FD issues for departing employees
2. Nominee – Fall (September – 6 weeks) (Deb)
 - a. Coordinate w/Patrick (recorded)
 - b. Registration sent (7/31)

iv. Resources (Deb/Heather)

1. Nominee Guide – w/Tiffany
 - a. Status:
2. EA Guide - Will be issued October 1. It is complete.
3. One Pager - Completed
4. Website – should we put a label on old documents that we keep in the archive
5. FD Video for PPS
6. Should we turn the following from the Nominee Guide into one pagers?
 - a. Nominee Process Tips - What You Need to Know
 - b. What to Gather Before You Start Your Public Financial Disclosure Report

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v. Guidance (Seth)

1. 203/205 Advisories Issues affecting incoming employees – full draft
draft reviewed by agencies (w/OGE)
2. Thematic Funds – approved for publication agencies reviewed full draft -
w/OGE
3. Transition Teams – full draft w/GCC-ELPB
4. Inaugural Events – Assigned – waiting draft To be assigned

vi. Integrity (Diana)

1. systems upgrades/enhancements related to nominee – working w/PNB. Done.
2. Update materials. We continue to update slide presentations and user resources (User Guide, Reviewer's Guide, Supplement, etc).
3. Create campaign structure. Training is setup with the Campaign agencies with Training IDs. We're developing a job aid for how to login to the Training site to use the training IDs.

~~vi-vii.~~ Compliance Division

1. Updated EA Compliance Form – expected release in

~~vii-viii.~~ Candidates

~~viii-ix.~~ Campaign

1. Initial Briefing (Shelley)
 - a. Objective/Talking Points: ways OGE can support a transition
2. Second Briefing (Shelley, Dave, Deb, Heather)
 - a. Objective/Talking Points: (b)(5) - deliberative/predecisional [REDACTED]
 - b. Materials to send after: Road Map and Nom Guide
3. Initial Integrity Briefing (Shelley, Diana, Tracy, PNB Rep)

B. Other

- a. Termination Reports
- b. Desk Officer Re-assignments – draft plan created. Finalize plan in October.

C. OGE

- a. Certify Succession Plan due: 9/15 (OMB memo with instructions coming next week)
- b. Certify November 1st – Briefing Materials
 - i. Profile Book – w/Diana for review
 - ii. One Pagers
- c. Agency Review Teams
 - i. Sign NDAs
 - ii. Have to provide equal access to space, office supplies, guest wifi access and printer access (test the printer) – expect hybrid teams. Shared Space for documents (HTML)

ii.

D. WH/OVP Ethics Program (sunsetting)

1. Dave spoke with WH
2. AQ Reminder - Nicole will send with word draft of AQ
3. Shelley coordinating with NARA rep to get meeting for Diana/Integrity to get ahead of PRA records problems

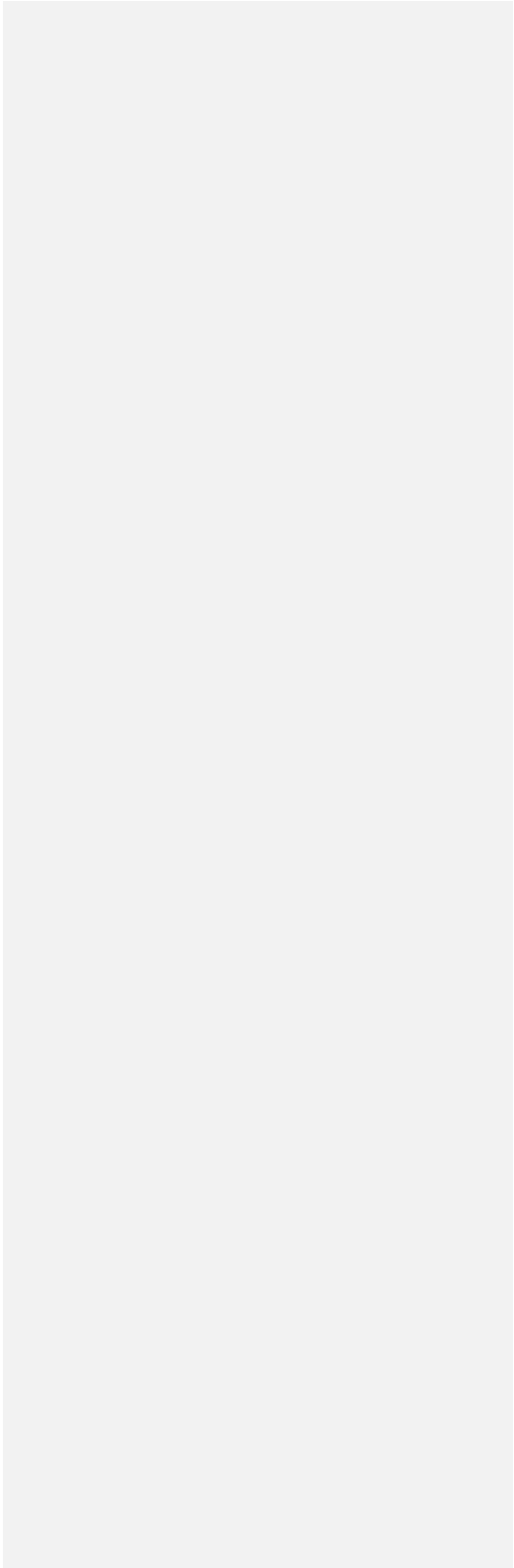
E. WH/OVP Ethics Program (set-up)

F. Ethics Pledge

- a. Guidance

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Scenario Planning



Election Readiness Monthly Meeting

9/19/2024

AGENDA

I. OGE Preparation as a Service Provider/Cross-Government Agency

A. Status updates/upcoming milestones/roadblocks

a. Pre-Election

i. Participation (Shelley)

1. ATDC: 9/24 (updated slides – new trg, guidance, resources)
2. Small/independent ATDC: 10/1/24
3. GCX discussion again on 9/18
4. Partnership Roundtable: 10/9

ii. Campaign

1. GSA coordinated initial service provider briefing (Shelley)
 - a. How OGE Can Help/Roadmap Next Steps (D – 9/11, R – 9/20)
2. Deep Dive Briefing (Shelley, Dave, Deb, Heather, Nicole)
 - a. D – 9/26, R – TBD
 - b. Objective/Talking Points: (b)(5) - deliberative/predecisional
[REDACTED]
 - c. Materials to send after: Road Map and Nom Guide

3. To Schedule: Initial *Integrity* Briefing (Shelley, Diana, Tracy, PNB Rep)

iii. Internal Training (Deb/Seth)

1. One group working on a hard exercise with Heather and Joyce
2. One newer reviewer group working on an exercise with Jack and Lorna.
Coordinated backups for CD Program Manager

iv. External Training (Nicole)

1. Other Topics (Nicole) Upcoming: Pledge – Post Employment; Incoming Leadership (October 23); FD issues for departing employees
2. Nominee – Fall (September – 6 weeks) (Deb)

v. Resources (Deb/Heather)

1. Nominee Guide – published. Remediated/re-posted today. *Note:* Update EA Guide link once published
2. EA Guide - Will be issued October 1. 508 remediation. Advisory pending
3. Various One Pagers - Completed, remediated. Posted today. *Note:* Send updated language to PPS once these are posted
4. To do: Add a label on old documents that are in the Election Readiness Archive (Nicole)

vi. Guidance (Seth)

1. Thematic Funds – published
2. 203/205 Advisories Issues affecting incoming employees (in final proofing)
3. Transition Teams – full draft w/GC

- 4. Inaugural Events – Assigned – waiting draft
- vii. *Integrity* (Diana)
 - 1. systems upgrades/enhancements related to nominee – working w/PNB. **Done.**
 - 2. Update materials. **We continue to update slide presentations and user resources (User Guide, Reviewer's Guide, Supplement, etc).**
 - 3. Create campaign structure. **Training is setup with the Campaign agencies with Training IDs. We're developing a job aid for how to login to the Training site to use the training IDs.**
- viii. Compliance Division
 - 1. Updated EA Compliance Form – expected release in / make sure it 508 remediated
- ix. Other
 - 1. DAEO/ADAEO Designation Check/Vacancy
 - a. Reminded at Nominee Meeting
 - b. Identify/send email (Liz B./Nicole)
- x. Candidates
- B. Other
 - a. Desk Officer Re-assignments – draft plan created. Finalize plan in October.
- C. WH/OVP Ethics Program (sunsetting)
 - 1. Dave spoke with WH
 - 2. AQ Reminder - Nicole will send with word draft of AQ (Week of 9/23)
 - 3. Diana met with NARA to try to prevent repeat of issues last cycle
 - 4. WHO Termination Reports
- D. WH/OVP Ethics Program (set-up)
- E. Ethics Pledge
 - a. Guidance

II. **OGE Transition Preparations as an Agency:**

- a. Certify Succession Plan due: OGE Submitted 9/10.
- b. Certify November 1st – Briefing Materials
 - i. Profile Book – w/Grant. Revised draft due 9/30
 - ii. One Pagers - w/Grant. Revised draft due 9/30
- c. Agency Review Teams
 - iii. WHCC/GSA to work to get campaigns to sign MOU by 10/1 setting terms
 - iv. E.g. Agency review team members signing NDAs
 - v. Have to provide equal access to space, office supplies, guest wifi access and printer access (test the printer) – expect hybrid teams. Shared Space for documents (HTML)

Election Readiness Monthly Meeting

10/23/2024 - Happy Birthday OGE!

AGENDA

I. OGE Preparation as a Service Provider/Cross-Government Agency

A. Status updates/upcoming milestones/roadblocks

a. Pre-Election

i. Participation (Shelley)

1. ATDC: 10/29 (updated slides – new trg, guidance, resources)
2. Small/independent ATDC: 10/31/24
3. GCX discussion again on 11/5
4. Partnership Roundtable on HR appointments process was 10/9. 11/18 Reminded PPS to update links to our forms on their website

ii. Campaign

1. GSA coordinated initial service provider briefing (Shelley)
 - a. How OGE Can Help/Roadmap Next Steps (D – 9/11, R – 9/20)
2. Deep Dive Briefing (Shelley, Dave, Deb, Heather, Nicole)
 - a. R – 9/26, D – 9/26
 - b. Objective/Talking Points: (b)(5) - deliberative/predecisional
[REDACTED]
 - c. Materials sent: Road Map and Nom Guide
3. To Schedule: Initial *Integrity* Briefing (Shelley, Diana, Tracy, Roland, Stephanie, Teresa)
 - a. D – 10/25, R - ?
4. Consultations
 - a. Pledge Consultations with D on 10/17
5. Information requests/provided
 - a. Provided outstanding GRECO recommendations for U.S. to both
 - b. Outstanding D request for initial nominee processing times

iii. Internal Training (Deb)

1. One group working on a hard exercise with Heather and Joyce
2. One newer reviewer group working on an exercise with Jack

iv. External Training (Nicole) - COMPLETED

v. Resources (Deb/Heather)

1. EA Guide – Issued 10/1
2. PFD Guide Update

vi. Guidance (Seth)

1. 203/205 Advisories Issues affecting incoming employees - issued
2. Transition Teams – issued
3. Inaugural Events – Assigned – decided on scope of LA - waiting draft

vii. *Integrity* (Diana)

1. systems upgrades/enhancements related to nominee – working w/PNB.

Done.

2. Update materials. Slide presentation for orientation is complete. The Integrity Campaign binders are complete and will be provided to the PTT after initial orientation. We continue to update user resources (User Guide, Reviewer's Guide, Supplement, etc).
3. Create campaign structure. Training is setup with the Campaign agencies with Training IDs. A job aid has been developed for how to login to the Training site to use the training IDs.
4. Early Access to Integrity – If a winner of the election is delayed, and the PTTs want access to Integrity, we've drafted a document for the PTTs that gives them a few points of caution to consider when using the live system prior to the determination of a winner ("pre-determination period").

viii. Compliance Division

1. Updated EA Compliance Form – expected release in / making sure it is 508 remediated

ix. Other

1. DAEO/ADAEO Designation Check/Vacancy
 - a. Reminded at Nominee Meeting
 - b. Identify/send email (Liz B./Nicole) - in progress

x. Internal

1. Updating credit hour policy

xi. Candidates

B. Other

- a. Desk Officer Re-assignments – draft plan created. Seth/Nicole met.

C. WH/OVP Ethics Program (sunsetting)

1. Dave spoke with WH/OVP
2. Diana met with NARA to try to prevent repeat of issues last cycle
3. WHO Termination Reports
4. Set up meeting with WH, NARA and Admin Office.
5. Collect AQ (prior to 1/20)

D. WH/OVP Ethics Program (set-up) - Seth/Chris/Nicole/Patrick/Stephanie - meet in November

E. Ethics Pledge

- a. Guidance

II. OGE Transition Preparations as an Agency:

- a. Certify Succession Plan due: OGE Submitted 9/10.
- b. Certify November 1st – Briefing Materials
 - i. Profile Book – Content complete. W/Tiffany for design
- c. Agency Review Teams (if contested, expect as early as Sunday 11/10 or holiday Monday 11/11)

- ii. WHCC/GSA to work to get campaigns to sign MOU by 10/1 setting terms
E.g. Agency review team members signing NDAs
- iii. Have to provide equal access to space, office supplies, guest wifi access and printer access (test the printer) – expect hybrid teams. Shared Space for documents (HTML)
- iv. Box.com - decision on set-up

Election Readiness Monthly Meeting

11/7/2024 -AGENDA

- I. OGE Preparation as a Service Provider/Cross-Government Agency**
 - A. Status updates/upcoming milestones/roadblocks
 - a. Post-Election
 - i. Participation (Shelley)
 - 1. ATDC Daily Meeting
 - ii. Resources (Deb/Heather)
 - 1. PFD Guide Update
 - 2. IEB/IET Checklist
 - iii. Guidance (Seth)
 - 1. Inaugural Events – w/AAB Desk Officer review
 - 2. WAG Advisory
 - 3. Spousal Employment – conflicts/recusal
 - iv. Compliance
 - 1. Updated EA Compliance Form – expected release in / making sure it is 508 remediated
 - v. Transition Team
 - 1. To Schedule: Initial *Integrity* Briefing (Shelley, Diana, Tracy, Roland, Stephanie, Teresa)
 - a. Reminders sent as well copies of the MOA
 - 2. Consultations
 - vi. Other
 - 1. DAEO/ADAEAO Designation Check/Vacancy
 - a. Reminded at Nominee Meeting
 - b. Identify/send email (Liz B./Nicole) - in progress
 - vii. Internal
 - 1. Updated credit hour policy
 - 2. Desk Officer Re-assignments – draft plan created. Seth/Nicole met.
 - viii. Nominee Reports
 - ix. Termination Reports
 - B. WH/OVP Ethics Program (sunsetting)
 - 1. Dave spoke with WH/OVP
 - 2. Diana met with NARA to try to prevent repeat of issues last cycle
 - 3. WHO Termination Reports
 - 4. Set up meeting with WH, NARA and Admin Office.
 - 5. Collect AQ (prior to 1/20) - reminder sent two weeks ago.
 - C. OGE Support - WH/OVP Ethics Program (set-up) - Seth/Chris/Nicole/Patrick/Stephanie
 - a. Meet in November

- D. Ethics Pledge
 - a. Guidance

II. **OGE Transition Preparations as an Agency:**

- a. Certify Succession Plan due: OGE Submitted 9/10.
- b. Certify November 1st – Briefing Materials: OGE submitted 11/1
- c. Agency Review Team
 - i. WHCC/GSA to work to get campaigns to sign MOU by 10/1 setting terms
E.g. Agency review team members signing NDAs
 - ii. Have to provide access to space, office supplies, guest wifi access and printer access (test the printer) –
 - iii. Box.com - decision on set-up

III. Workbook

- a. Tracy/Roland - add comms from last with D campaign

IV. After Action Review

Election Readiness Monthly Meeting

11/12/2024 -AGENDA

- I. OGE Preparation as a Service Provider/Cross-Government Agency**
 - A. Status updates/upcoming milestones/roadblocks
 - a. Post-Election
 - i. Participation (Shelley)
 - 1. ATDC Daily Meeting
 - ii. Resources (Deb/Heather)
 - 1. PFD Guide Update – completed on 11/8
 - iii. Guidance (Seth)
 - 1. Inaugural Events – w/AAB Desk Officer review
 - 2. Spousal Employment – conflicts/recusal
 - iv. Compliance
 - 1. Updated EA Compliance Form – finishing remediation
 - 2. [DO-07-22](#) - Presidential Recess Appointees—Modification of OGE Process
 - v. Transition Team
 - 1. To Schedule: Initial *Integrity* Briefing (Shelley, Diana, Tracy, Roland, Stephanie, Teresa)
 - a. Reminders sent as well copies of the MOA
 - 2. Consultations
 - vi. Other
 - 1. DAEO/ADAEO Designation Check/Vacancy
 - a. Reminded at Nominee Meeting
 - b. Email sent (vacancies/resend paperwork) - in progress
 - vii. Internal
 - 1. Desk Officer Re-assignments – draft plan created. Seth/Nicole met.
 - viii. Nominee Reports
 - ix. Termination Reports
 - B. WH/OVP Ethics Program (sunsetting)
 - 1. Dave spoke with WH/OVP
 - 2. Diana met with NARA to try to prevent repeat of issues last cycle
 - 3. WHO Termination Reports
 - 4. Set up meeting with WH, NARA and Admin Office.
 - 5. Collect AQ (prior to 1/20) - reminder sent two weeks ago.
 - C. OGE Support - WH/OVP Ethics Program (set-up) - Seth/Chris/Nicole/Patrick/Stephanie
 - a. Meet in November
 - D. Ethics Pledge
 - a. Guidance

II. OGE Transition Preparations as an Agency:

- a. Certify Succession Plan due: OGE Submitted 9/10.
- b. Certify November 1st – Briefing Materials: OGE submitted 11/1
- c. Agency Review Team
 - i. WHCC/GSA to work to get campaigns to sign MOU by 10/1 setting terms
E.g. Agency review team members signing NDAs
 - ii. Have to provide access to space, office supplies, guest wifi access and printer access (test the printer) –
 - iii. Box.com - decision on set-up

III. Workbook

- a. Tracy/Roland - add comms from last with D campaign

IV. After Action Review

Election Readiness Monthly Meeting

11/19/2024 -AGENDA

I. OGE Preparation as a Service Provider/Cross-Government Agency

A. Status updates/upcoming milestones/roadblocks

a. Post-Election

i. Participation (Nicole)

1. ATDC Daily Meeting

ii. Guidance (Seth)

1. Inaugural Events – w/AAB Desk Officer review

2. Spousal Employment – conflicts/recusal

iii. Compliance

1. Updated EA Compliance Form – w/Chip

iv. Transition Team

1. To Schedule: Initial *Integrity* Briefing (Shelley, Diana, Tracy, Roland, Stephanie, Teresa)

a. Reminders sent as well copies of the MOA

2. Consultations

v. Other

1. DAEO/ADAEAO Designation Check/Vacancy

a. Reminded at Nominee Meeting

b. Email sent (vacancies/resent paperwork) - in progress

vi. Internal

1. Desk Officer Re-assignments – draft plan created. Seth/Nicole met.

vii. Nominee Reports

viii. Termination Reports

B. WH/OVP Ethics Program (sunsetting)

1. Dave spoke with WH/OVP

2. Diana met with NARA to try to prevent repeat of issues last cycle

3. WHO Termination Reports

4. Set up meeting with WH, NARA and Admin Office.

5. Collect AQ (prior to 1/20) - reminder sent two weeks ago.

C. OGE Support - WH/OVP Ethics Program (set-up) - Seth/Chris/Nicole/Patrick/Stephanie

a. Meet in November

D. Ethics Pledge

a. Guidance

II. OGE Transition Preparations as an Agency:

- a. Certify Succession Plan due: OGE Submitted 9/10.
 - b. Certify November 1st – Briefing Materials: OGE submitted 11/1
 - c. Agency Review Team
 - i. WHCC/GSA to work to get campaigns to sign MOU by 10/1 setting terms
E.g. Agency review team members signing NDAs
 - ii. Have to provide access to space, office supplies, guest wifi access and printer access (test the printer) –
 - iii. Box.com - decision on set-up
- III. Workbook
- a. Tracy/Roland - add comms from last with D campaign
- IV. After Action Review

Election Readiness Monthly Meeting

11/26/2024 -AGENDA

I. OGE Preparation as a Service Provider/Cross-Government Agency

A. Status updates/upcoming milestones/roadblocks

a. Post-Election

i. Participation (Nicole)

1. ATDC Daily Meeting

ii. Guidance (Seth)

1. Inaugural Events – w/Shelley

2. Spousal Employment – conflicts/recusal

iii. Compliance

1. Updated EA Compliance Form – Issued

iv. Transition Team

1. To Schedule: Initial *Integrity* Briefing (Shelley, Diana, Tracy, Roland, Stephanie, Teresa)

a. Reminders sent as well copies of the MOA

2. Consultations

v. Other

1. DAEO/ADAEO Designation Check/Vacancy

a. Reminded at Nominee Meeting

b. Email sent (vacancies/resent paperwork) - in progress

vi. Internal

1. Desk Officer Re-assignments – draft plan created. Seth/Nicole met.

vii. Nominee Reports

viii. Termination Reports

B. WH/OVP Ethics Program (sunsetting)

1. Dave spoke with WH/OVP

2. Diana met with NARA to try to prevent repeat of issues last cycle

3. WHO Termination Reports (President and Vice President)

4. Set up meeting with WH, NARA and Admin Office.

5. Collect AQ (prior to 1/20) - reminder sent two weeks ago.

C. OGE Support - WH/OVP Ethics Program (set-up) - Seth/Chris/Nicole/Patrick/Stephanie

a. Meet in November

D. Ethics Pledge

a. Guidance

II. OGE Transition Preparations as an Agency:

- a. Certify Succession Plan due: OGE Submitted 9/10.
 - b. Certify November 1st – Briefing Materials: OGE submitted 11/1
 - c. Agency Review Team
 - i. WHCC/GSA to work to get campaigns to sign MOU by 10/1 setting terms
E.g. Agency review team members signing NDAs
 - ii. Have to provide access to space, office supplies, guest wifi access and printer access (test the printer) –
 - iii. Box.com - decision on set-up
- III. Workbook
- a. Tracy/Roland - add comms from last with D campaign
- IV. After Action Review

Election Readiness Monthly Meeting

12/10/2024 -AGENDA

- I. OGE Preparation as a Service Provider/Cross-Government Agency**
 - A. Status updates/upcoming milestones/roadblocks
 - a. Post-Election
 - i. Participation (Nicole)
 - 1. ATDC Daily Meeting
 - 2. PPS – 12/17, Shelley on a panel
 - ii. Guidance (Seth)
 - 1. Inaugural Events – issued
 - 2. Spousal Employment – conflicts/recusal - with Desk Officer
 - iii. Compliance
 - 1. Updated EA Compliance Form – Issued
 - iv. Transition Team
 - 1. 12/10 at 3pm: Initial *Integrity* Briefing (Shelley, Diana, Tracy, Roland, Stephanie, Teresa)
 - 2. Process Meeting
 - 3. Consultations
 - v. Other
 - 1. DAEO/ADAEO Designation Check/Vacancy
 - a. Reminded at Nominee Meeting
 - b. Email sent (vacancies/resend paperwork) - in progress
 - vi. Internal
 - 1. Desk Officer Re-assignments – draft plan created. Seth/Nicole met.
 - vii. Nominee Reports
 - viii. Termination Reports
 - 1. Pre-Reviews of WH Reports
 - B. WH/OVP Ethics Program (sunsetting)
 - 1. Dave spoke with WH/OVP
 - 2. Diana met with NARA to try to prevent repeat of issues last cycle
 - 3. WHO Termination Reports (President and Vice President)
 - 4. Set up meeting with WH, NARA and Admin Office.
 - 5. Collect AQ (prior to 1/20) - reminder sent two weeks ago.
 - C. OGE Support - WH/OVP Ethics Program (set-up) - Seth/Chris/Nicole/Patrick/Stephanie
 - a. Meet in November
 - D. Ethics Pledge
 - a. Guidance

II. OGE Transition Preparations as an Agency:

- a. Certify Succession Plan due: OGE Submitted 9/10.
- b. Certify November 1st – Briefing Materials: OGE submitted 11/1
- c. Agency Review Team
 - i. WHCC/GSA to work to get campaigns to sign MOU by 10/1 setting terms
E.g. Agency review team members signing NDAs
 - ii. Have to provide access to space, office supplies, guest wifi access and printer access (test the printer) –
 - iii. Box.com - decision on set-up

III. Press

IV. Workbook

- a. Tracy/Roland - add comms from last with D campaign

V. After Action Review

Election Readiness Monthly Meeting

12/31/2024

AGENDA

A. Status updates/upcoming milestones/roadblocks

- a. Post-Election, Pre-Inauguration
 - i. Participation
 - 1. ATDC – daily
 - 2. ATDC, ABCs
 - ii. Nominee Reports
 - 1. 12.27 - Meeting with Dave
 - 2. 12.27 - First report released to OGE
 - iii. *Integrity* (Diana/Roland)
 - iv. Outstanding issues/pending with the transition team
 - 1. Nominee Timeline/Expectations
 - 2. Nominee Process Questions
 - 3. Ethics Policy Decisions related nominee
 - 4. Understanding who files 278
 - 5. DOJ/State PPO – administrative decision
 - v. Press (Liz H.)
 - vi. Resources (Nicole)
 - 1. Job Aids (503, 209, Confidential Clients) - published to IEG
 - 2. Onboarding Checklist for PAS (developed as part of training)
 - vii. Guidance (Seth)
 - 1. Pay threshold LA (w/C of S) Publish by 1/10/25
 - 2. CNC Outside Earned Income Limitations LA (w/GC) Publish by 1/30/25
 - 3. Spousal Assets LA (w/C of S)

B. WHO/OVP Ethics Program (establishing)

- a. 12/18 Meeting with Transition Team (Shelley and Sean)
- b. 12/18 Internal Meeting – [outline](#) created of support OGE can provide
- c. Entity Set-Up in Integrity
 - i. Integrity 101 Training provided on 12/30 . Next step – sign the mou needed to set up entity within OGE

C. WH/OVP Ethics Program (sunsetting)

- a. WH/NARA
- b. Submit Annual Questionnaire
- c. Term Reports
- d. OA – they are asking them to serve as poc for post-employment

D. Reminders

- a. Update the [Excel Workbook](#)