



U.S. SMALL BUSINESS ADMINISTRATION
WASHINGTON, DC 20416

OFFICE OF GENERAL COUNSEL

May 3, 2021

Austin R. Evers
Executive Director
American Oversight
1030 15th Street, NW, Suite B255
Washington, DC 20005
FOIA@americanoversight.org

Dear Mr. Evers,

This letter is in response to your Freedom of Information Act (“FOIA”) request No. SBA-2021-001475 in which you requested the following:

All email communications (including emails, email attachments, complete email chains, and calendar invitations) sent by the Small Business Administration’s (SBA) designated agency presidential transition point of contact containing any of the following key terms:

- a. Ascertain
- b. Ascertainment
- c. “Presidential Transition Act”
- d. “3 U.S.C. 102”
- e. “3 U.S.C. §102”
- f. “3 U.S.C. § 102”
- g. “apparent winner”
- h. “President-elect”
- i. “President elect”
- j. “December 14th”
- k. “December 14”
- l. “Dec. 14”
- m. “12/14”
- n. “projected winner”
- o. “electoral college”
- p. POTUS
- q. VPOTUS
- r. “Trump campaign”
- s. “Biden campaign”
- t. “transition team”
- u. “GSA administrator”
- v. “Emily Murphy”
- w. “Administrator Murphy”

Please provide all responsive records from November 4, 2020, through the date a search is conducted.

SBA is releasing the attached documents that are responsive to your request. Redactions have been made pursuant to FOIA Exemptions 5, and 6. Exemption 5 protects deliberative and pre-decisional materials written as part of the decision-making process in federal agencies. Exemption 6 protects information about individuals in “personnel and medical files and similar files” when the disclosure of such information “would constitute a clearly unwarranted invasion of personal privacy.” The Exemption 6 redacted information consists of personal cell phone numbers and email addresses, which clearly falls under the protection of FOIA exemption 6.

If you are dissatisfied with the Agency’s decision, you may file an administration appeal within 90 days of the date of this letter to:

Office of Hearings and Appeals
Attention: Oreoluwa Fashola, FOIA Office
409 3rd Avenue, SW – 8th Floor
Washington, D.C. 20416

If you are unable to resolve your FOIA dispute through our FOIA Public Liaison in the Office of Hearings and Appeals, the Office of Government Information Services (“OGIS”), the Federal FOIA Ombudsman’s Office, offers mediation services to help resolve disputes between FOIA requesters and Federal agencies. The contact information for OGIS is:

Office of Government Information Services
National Archives and Records Administration
8601 Adelphi Road-OGIS
College Park, MD 20740-6001
ogis@nara.gov
ogis.archives.gov
202-741-5770
877-684-6448

Sincerely,

/s/ *Eric S. Benderson*

Eric S. Benderson
Chief FOIA Officer
Office of General Counsel
U.S. Small Business Administration

From: [Kurtenbach, Daniel J.](#)
To: [ckellogg@jbrpt.org](#); [mroth@jbrpt.org](#); [mchodos@jbrpt.org](#); [aplews@jbrpt.org](#); [Jonathan Swain](#)
Cc: [Kong, Stephen D.](#); [Manger, William M.](#); [Briggs, William J.](#)
Subject: 7a 504 ARRA performance
Date: Tuesday, December 8, 2020 10:15:00 AM
Attachments: [Transition Team - 7a-504 ARRA performance.xlsx](#)

Team,

Please see the attached ARRA information.

Best,
Dan

Daniel J. Kurtenbach
White House Fellow
U.S. Small Business Administration
(202) 940-6367

From: [Kurtenbach, Daniel J.](#)
To: [Vallante, Michael A.](#); [Parker, Victor](#)
Cc: [Kong, Stephen D.](#); [Kupfer, Jeffrey F.](#)
Subject: AAR Interviews (DDs)
Date: Monday, December 21, 2020 3:13:00 PM

Mike and Victor,

Hope you're well.

(b) (5)



Jeff/Steve, let me know if I missed anything.

Thanks much,
Dan

Daniel J. Kurtenbach
White House Fellow
U.S. Small Business Administration
(202) 940-6367

From: [Kurtenbach, Daniel J.](#)
To: mary.gibert@gsa.gov
Subject: Accepted: Office Hours on Ascertainment: 2020 Apparent Successful Candidates for the offices of President and Vice President - November 24, 2020

From: [Kurtenbach, Daniel J.](#)
To: [MBX EOP White House Fellows](#)
Subject: Accepted: POTUS: Photo Opportunity with 2020-2021 White House Fellows

From: [Kurtenbach, Daniel J.](#)
To: [MBX EOP White House Fellows](#)
Subject: Accepted: POTUS: Photo Opportunity with 2020-2021 White House Fellows

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To: [MBX EOP White House Fellows](#)
Subject: Accepted: POTUS: Photo Opportunity with 2020-2021 White House Fellows

Please hold for transition sync with incoming Agency Transition Team.

Join on your computer or mobile app

Or call in (audio only)

Phone Conference ID:

<https://www.sba.gov/sites/all/themes/smallbizd7/images/SBA_logo.png>

AMERICAN
OVERSIGHT

From: [Kurtenbach, Daniel J.](#)
To: [Griffin, Antwaun D.](#)
Cc: [Nelson, Nicole M.](#); [Kong, Stephen D.](#)
Subject: CORT charter & BCG ODA AAR (after action report)
Date: Monday, April 12, 2021 8:08:00 PM
Attachments: [CORT Board Charter - Final.pdf](#)
[2021.01.29 ODA EIDL After Action Report Key Findings vFinal.pdf](#)

Antwaun,

Great chatting earlier.

1. (b) (5) [REDACTED]

[REDACTED]

Thanks, and have a great evening.

Best,
Dan

Daniel J. Kurtenbach
White House Fellow
U.S. Small Business Administration
Office of the Administrator
(515) 231-5805

From: [Kurtenbach, Daniel J.](#)
To: [Jorge Silva Puras](#)
Subject: FW: Accepted: ART/OFO DD Sync @ Mon Dec 14, 2020 10am - 11am (EST) (Kurtenbach, Daniel J.)
Date: Monday, December 14, 2020 10:03:03 AM
Attachments: [invite.ics](#)

From: Google Calendar <calendar-notification@google.com>
Date: Friday, December 11, 2020 at 2:13 PM
To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Subject: Accepted: ART/OFO DD Sync @ Mon Dec 14, 2020 10am - 11am (EST) (Kurtenbach, Daniel J.)

CAUTION - The sender of this message is external to the SBA network. Please use care when clicking on links and responding with sensitive information. Send suspicious email to spam@sba.gov.

Jorge Silva Puras has accepted this invitation.

ART/OFO DD Sync

When Mon Dec 14, 2020 10am – 11am Eastern Time - New York

Calendar Kurtenbach, Daniel J.

Who

- Kurtenbach, Daniel J. - organizer
- Jorge Silva Puras - creator
- Cassius F. Butts
- Christopher Upperman
- Ellen Kim
- Isabel Guzman
- Jonathan Swain
- Brinkley, Maureen E.
- Golik, Dawn E.
- Fleming, John F.
- Vallante, Michael A.
- Poynter, Stacey
- Parker, Victor
- Carson, Barbara E. - optional
- Stubblefield, Larry - optional
- Kong, Stephen D. - optional

Microsoft Teams meeting
Join on your computer or mobile app
Click here to join the meeting

[REDACTED] DC
Phone Conference ID [REDACTED]

Find a local number | Reset PIN

[https://www.sba.gov/sites/all/themes/smallbizd7/images/SBA_logo.png]

Learn More | Meeting options

Invitation from [Google Calendar](#)

You are receiving this courtesy email at the account daniel.kurtenbach@sba.gov because you are an attendee of this event.

To stop receiving future updates for this event, decline this event. Alternatively you can sign up for a Google account at <https://calendar.google.com/calendar/> and control your notification settings for your entire calendar.

Forwarding this invitation could allow any recipient to send a response to the organizer and be added to the guest list, or invite others regardless of their own invitation status, or to modify your RSVP. [Learn More](#).

La Universidad del Sagrado Corazón le notifica que el contenido de este correo electrónico, al igual que sus anejos, está destinado únicamente a la persona o personas a quien fue dirigido y puede contener información sensible, confidencial y/o privilegiada. Si usted lo recibe equivocadamente, queda apercibido de que el uso, revisión, retroalimentación, divulgación, distribución y reproducción del mismo, ya sea oralmente o por cualquier otro medio, o cualquier acción relacionada con el mismo está prohibida. En tal caso, debe comunicarse con el remitente y eliminar el correo y sus anejos de cualquier computadora en la cual haya sido recibido o depositado.

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-O g na Appenstern-
 Fom Ku embach Dan e J -Dan e Ku tumbachibha gac/
 Sent Fy December 11 2020 140 PM
 To Ku tumbach Dan e J Fy tumbachibha J B ak ey Man e e Go k Dawson Poyate Stacy Pake Vito Vis e M chae A Jo ge S va Pa n Cao u F Be to Isder Gumm Ch stophe Uppe man Jerehan S na E n Ku
 C Keny Stephen D Ca sam Be ha s E S shib e d La y
 Subject ART OFO DD Sys
 When Monday December 14 2020 10 00 AM-11 00 AM (UTC 05 00) Easte n Time US & Canada
 Who e

Join our community of mobile app

United States: Washington DC

[illegible]

From: [Kurtenbach, Daniel J.](#)
To: [Manger, William M.](#); [Kong, Stephen D.](#)
Subject: FW: Demos/walkthroughs of 2 Capital Access Systems
Date: Tuesday, December 15, 2020 9:56:58 AM

Bill,

Please see the below request and let me know your thoughts.

(b) (5) [REDACTED]

Thanks,
Dan

From: Arthur Plews <aplews@ptt.gov>
Date: Monday, December 14, 2020 at 10:58 PM
To: Kong, Stephen D. <Stephen.Kong@sba.gov>, Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Cc: Ellen Kim <eekim@ptt.gov>, Jonathan Swain <jswain@ptt.gov>, Clifton Kellogg <ckellogg@ptt.gov>, Michael Roth <mroth@ptt.gov>, David Chang <dchang@ptt.gov>
Subject: Demos/walkthroughs of 2 Capital Access Systems

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Hi Steve and Dan,

As a follow-up to our systems discussion with the Office of Capital Access on Friday, we'd like to request a couple of systems demos:

- The PPP Forgiveness Portal (what lenders see and what SBA sees)
- The EIDL Loan Servicing functionality in E-Tran

Would it be possible to schedule those?

Best,

Arthur Plews

From: [Kurtenbach, Daniel J.](#)
To: [Hernandez, Elias](#); [Brill, Julie](#)
Cc: [Kong, Stephen D.](#)
Subject: FW: FW: Request for HR Data and Documentation
Date: Friday, December 4, 2020 10:01:31 AM

(b) (5)

Best,
Dan

From: Michele Chang <mchang@ptt.gov>
Date: Friday, December 4, 2020 at 9:38 AM
To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Cc: Ellen Kim <eekim@jbrpt.org>, Jonathan Swain <jswain@jbrpt.org>, Kong, Stephen D. <Stephen.Kong@sba.gov>
Subject: Re: FW: Request for HR Data and Documentation

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Dan,

(b) (5)

- [REDACTED]
- [REDACTED]

- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]

Please let us know if you have any questions and we would appreciate receiving these documents as soon as possible, ideally before the weekend.

Thank you,
Michele Chang

On Thu, Dec 3, 2020 at 3:38 PM Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov> wrote:

Team,

(b) (5)

Thanks much,
Dan

From: Hernandez, Elias <elias.hernandez@sba.gov>

Sent: Wednesday, December 2, 2020 2:12 PM

To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>

Cc: Kong, Stephen D. <Stephen.Kong@sba.gov>; Brill, Julie <Julie.Brill@sba.gov>

Subject: RE: Request for HR Data and Documentation

Hi Dan,

We are working on these deliverables but need clarification on the two bullets highlighted below.

Please advise.

Elias

From: Kong, Stephen D. <Stephen.Kong@sba.gov>
Sent: Wednesday, December 2, 2020 11:39 AM
To: Hernandez, Elias <elias.hernandez@sba.gov>; Brill, Julie <Julie.Brill@sba.gov>; Biaggi-Ayer, Denise A. <Denise.Biaggi-Ayer@sba.gov>
Cc: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>; Carson, Barbara E. <barbara.carson@sba.gov>; Stubblefield, Larry <Larry.Stubblefield@sba.gov>; Levine, Nina D. <nina.levine@sba.gov>; Fishman, David A. <david.fishman@sba.gov>; Hunter, Karen L. <Karen.Hunter@sba.gov>
Subject: FW: Request for HR Data and Documentation

Elias,

Please see below. CC'ing the legal team who need to vet the info/materials.

Thanks,
Steve

From: Michele Chang <mchang@jbrpt.org>
Sent: Wednesday, December 2, 2020 11:35 AM
To: Kong, Stephen D. <Stephen.Kong@sba.gov>
Cc: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>; Ellen Kim <EEKIM@jbrpt.org>; Jonathan Swain <jswain@jbrpt.org>
Subject: Request for HR Data and Documentation

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Stephen,

(b) (5)
[Redacted]

- [Redacted]
- [Redacted]
- [Redacted]
- [Redacted]
- [Redacted]
- [Redacted]
- [Redacted]
- [Redacted]

(b) (5)



-

Please let us know if you have any questions.

Thanks,
Michele Chang

From: [Kurtenbach, Daniel J.](#)
To: [Kong, Stephen D.](#); [Manger, William M.](#); [Briggs, William J.](#)
Subject: FW: OCA/ART Sync
Date: Monday, December 14, 2020 11:24:52 AM

(b) (5)

I'll try to reschedule for Wednesday when our team has the most availability.

Best,
Dan

From: Michael Roth <mroth@jbrpt.org>
Date: Monday, December 14, 2020 at 11:22 AM
To: Clifton Kellogg <ckellogg@jbrpt.org>
Cc: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>, Kong, Stephen D. <Stephen.Kong@sba.gov>, aplews@jbrpt.org <aplews@jbrpt.org>, mchodos@jbrpt.org <mchodos@jbrpt.org>
Subject: Re: OCA/ART Sync

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I am the same. Can we reschedule this for tomorrow or Wednesday?

On Mon, Dec 14, 2020 at 11:15 AM Clifton Kellogg <ckellogg@jbrpt.org> wrote:

Regrettably, I am not available. I defer to Michael Roth on whether to hold this meeting time or not.

On Mon, Dec 14, 2020 at 10:19 AM Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov> wrote:

Ensuring that everyone received this invite (sent on Friday). I have confirmation from the SBA team but none thus far from PTT (except a declination from Arthur). Thanks! Dan 515-231-5805

From: Daniel.Kurtenbach@sba.gov
When: 1:00 PM - 2:00 PM December 14, 2020
Subject: OCA/ART Sync

Microsoft Teams meeting

Join on your computer or mobile app

[Click here to join the meeting](#)

Or call in (audio only)

[REDACTED]

United States, Washington DC

Phone Conference ID: [REDACTED]

[Find a local number](#) | [Reset PIN](#)



[Learn More](#) | [Meeting options](#)

From: [Kurtenbach, Daniel J.](#)
To: [Kong, Stephen D.](#)
Subject: FW: thank you
Date: Monday, December 14, 2020 5:45:30 PM

(b) (5)

Best,
Dan

From: Fleming, John F. <john.fleming@sba.gov>
Date: Monday, December 14, 2020 at 5:04 PM
To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Subject: thank you

Dan, [REDACTED].

[REDACTED]:

[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

[REDACTED]

- [REDACTED]
- [REDACTED]
[REDACTED]
- [REDACTED]
[REDACTED]
- [REDACTED]
[REDACTED]

[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

Please give us feedback at www.sba.gov/feedback

Thank you

John F. Fleming, Director
Delaware District Office

U.S. Small Business Administration

Cell 302-530-2554



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From: Kurtenbach, Daniel J.
To: [Kupfer, Jeffrey F.](#)
Subject: Fwd: First Political Appointee Hire
Date: Wednesday, December 23, 2020 4:34:32 PM
Attachments: [image001.png](#)

FYI.

From: Kong, Stephen D. <Stephen.Kong@sba.gov>
Sent: Wednesday, December 23, 2020 3:59 PM
To: Michele Chang; Hernandez, Elias
Cc: Kurtenbach, Daniel J.
Subject: RE: First Political Appointee Hire

Hi Michele—see below

1. Paperwork/Info needed for politicals—

Overview:

- Candidate information
 - o Full Name
 - o Mailing Address
 - o Phone #
 - o Email
 - o Date of Birth
 - o 5 years of salary history (if available)
 - Position Information
 - o PD (if classified; if not, we will work with the White Liaison or other identified contact)
 - o Office / Position Title / Security Level
 - o Tentative Grade (we will work with the requestor to ensure resume experience aligns)
 - Start Information
 - o Requested start date
 - o Proposed salary (typically starts as step 1 of grade)
 - Supporting Documents
 - o Resume (detailed if possible helps with qualifications / placement)
 - o PD (if already classified)
 - o OF-306 (Executive Resources can reach out if preferred due to PII info)
2. As for off-boarding the current politicals, the answer is yes. Several of the more junior Schedule Cs have already given notice and will be departing at the start of the year. Elias's team and others have a meeting with all of the Schedule Cs on January 5 to brief them on the offboarding process and benefits.

3. As for security clearances, below are the political positions that require Top Secret/SCI, Top Secret and Secret clearances.

Small Business Administration Clearance Holder Positions

Office of the Administrator

Administrator

Deputy Administrator/Chief Operating Officer

Chief of Staff

Deputy Chief of Staff

Office of General Counsel

General Counsel

Associate General Counsel

GCBD

Associate Administrator for GCBD

OFO

Regional Administrator – Region 8 Denver (COOP)

Office of International Trade

Associate Administrator for International Trade

In addition, please note from Joe Eitel (our head of the Office of Personnel Security located in Denver)

Political Appointee Processing

1. The Special Assistant to the Administrator is not currently a [REDACTED] position. I could potential see this as being supported if they are going to be in conversations or meetings with the Administrator where a [REDACTED] would be required. If the transition team feels this should be [REDACTED] – Executive Resources (Elias's shop) can revise the position risk to a [REDACTED]
2. We will check to see if the appointee has a current investigation on file that meets the requirements of the position risk. If not, we will send them the investigative paperwork.
3. We ask that the appointee come in and get fingerprinted/enrolled at the 5th floor security office. This allows us to push fingerprints for the FBI check and issue a PIV card.
4. We review the investigation and associated paperwork for any suitability issues. Serious issues that may warrant an unsuitable finding are worked with the White House Liaison (or designee).
5. Once all the investigative paperwork is back and cleared for suitability issues – our office approves the EOD with Executive Resources and signs the 1228 for network access.

Clearances

1. Political Appointee's at the SECRET level will complete the investigative paperwork as detailed above. They will be granted an INTERIM SECRET while their paperwork is processed at the Defense Counterintelligence and Security Agency (DCSA).
2. Political Appointee's at the TOP SECRET level who currently do not hold a TS clearance will

need a waiver from the Administrator (or Acting) before we can grant the INTERIM Top Secret and approve the EOD.

Timelines

Clean packages (no suitability issues) we ask for 5-7 business days (3-4 of those days are given to the appointee to complete the investigation paperwork). Packages that may have suitability issues we keep the White House Liaison (or designee) in the loop on timelines.

All clearances are not granted until a security briefing is conducted and a SF-312 is signed. We then do the grant letters and issue the clearance in DCSA's system. Our preliminary plan is I will come out the week of January 25th and do a group briefing for all political appointee's who require a clearance. Then we can get all of them granted and in place that week.

From: Michele Chang <mchang@ptt.gov>

Sent: Wednesday, December 23, 2020 12:12 PM

To: Kong, Stephen D. <Stephen.Kong@sba.gov>; Hernandez, Elias <elias.hernandez@sba.gov>

Cc: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>

Subject: Re: First Political Appointee Hire

CAUTION - The sender of this message is external to the SBA network. Please use care when clicking on links and responding with sensitive information. Send suspicious email to spam@sba.gov.

Stephen and Elias - Apologies, a couple more questions regarding onboarding of political appointees at SBA:

1) Do you have a list of which political appointees typically have top secret clearance or any clearance level outside of the norm? Our recollection is that is the the Administrator, Deputy Administrator, Chief of Staff and Special Assistant to the Administrator.

2) Can you please let us know what the security clearance and any suitability process is for political appointees at SBA? We want to make sure we are aware of your processes so we can make sure we can get folks through these in a timely manner.

Thank you very much,
Michele

On Wed, Dec 23, 2020 at 12:07 PM Michele Chang <mchang@ptt.gov> wrote:

Hi Stephen and Elias,

Hope you all are well and getting ready hopefully for some time off for the holidays.

Wanted to reach out because we have our first political appointee hire and wanted to see what

paperwork and information you all need from the individual to begin processing. Please let me know.

Also, can you please confirm that all current political appointees are preparing to be offboarded? Please let me know as well.

Thank you so much - and best wishes for a great holiday!

Best,
Michele Chang



From: [Kurtenbach, Daniel J.](#)
To: [Kupfer, Jeffrey F.](#)
Subject: Fwd: First Political Appointee Hire
Date: Wednesday, December 23, 2020 4:38:46 PM
Attachments: [image001.png](#)

FYI.

Daniel J. Kurtenbach
White House Fellow
U.S. Small Business Administration
(202) 940-6367

From: Kong, Stephen D. <Stephen.Kong@sba.gov>
Sent: Wednesday, December 23, 2020 3:59 PM
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From: Michele Chang <mchang@ptt.gov>

Sent: Wednesday, December 23, 2020 12:12 PM

To: Kong, Stephen D. <Stephen.Kong@sba.gov>; Hernandez, Elias <elias.hernandez@sba.gov>

Cc: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>

Subject: Re: First Political Appointee Hire

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Stephen and Elias - Apologies, a couple more questions regarding onboarding of political appointees at SBA:

1) Do you have a list of which political appointees typically have top secret clearance or any clearance level outside of the norm? Our recollection is that is the the Administrator, Deputy Administrator, Chief of Staff and Special Assistant to the Administrator.

2) Can you please let us know what the security clearance and any suitability process is for political appointees at SBA? We want to make sure we are aware of your processes so we can make sure we can get folks through these in a timely manner.

Thank you very much,
Michele

On Wed, Dec 23, 2020 at 12:07 PM Michele Chang <mchang@ptt.gov> wrote:

Hi Stephen and Elias,

Hope you all are well and getting ready hopefully for some time off for the holidays.

Wanted to reach out because we have our first political appointee hire and wanted to see what paperwork and information you all need from the individual to begin processing. Please let me know.

Also, can you please confirm that all current political appointees are preparing to be offboarded? Please let me know as well.

Thank you so much - and best wishes for a great holiday!

Best,
Michele Chang

[REDACTED]

From: [Microsoft Outlook](#) on behalf of [Kurtenbach, Daniel J.](#)
To: [Kurtenbach, Daniel J.](#)
Subject: Meeting Forward Notification: ART/OFO DD Sync

Your meeting was forwarded

Kurtenbach, Daniel J. <<mailto:Daniel.Kurtenbach@sba.gov>> has forwarded your meeting request to additional recipients.

Meeting
ART/OFO DD Sync

Meeting Time
Monday, December 14, 2020 10:00 AM-11:00 AM.

Recipients
Jorge Silva Puras <<mailto:jorgep.silva@sagrado.edu>>

All times listed are in the following time zone: (UTC-05:00) Eastern Time (US & Canada)

Sent by Microsoft Exchange Server

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Subject: Meeting Forward Notification: OCA/ART Sync

Your meeting was forwarded

Kurtenbach, Daniel J. <<mailto:Daniel.Kurtenbach@sba.gov>> has forwarded your meeting request to additional recipients.

Meeting
OCA/ART Sync

Meeting Time
Monday, December 14, 2020 1:00 PM-2:00 PM.

Recipients
ckellogg@jbrpt.org <<mailto:ckellogg@jbrpt.org>>
mroth@jbrpt.org <<mailto:mroth@jbrpt.org>>
mchodos@jbrpt.org <<mailto:mchodos@jbrpt.org>>
aplews@jbrpt.org <<mailto:aplews@jbrpt.org>>
Kong, Stephen D. <<mailto:Stephen.Kong@sba.gov>>

All times listed are in the following time zone: (UTC-05:00) Eastern Time (US & Canada)

Sent by Microsoft Exchange Server

Please hold for transition sync with incoming Agency Transition Team.

Learn More <<https://aka.ms/JoinTeamsMeeting>> | Meeting options <https://teams.microsoft.com/meetingOptions/?organizerId=71729437-2aa2-415a-b2be-7ae01b5f9cf1&tenantId=3c89fd8a-7f68-4667-aa15-41cbf2208961&threadId=19_meeting_MjczNTU4MWQitNjl2NS00OThmLTgyNjltMzA4MmYwNWl1ZjUz@thread.v2&messageId=0&language=en-US>

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United States, Washington DC

Find a local number <<https://dialin.teams.microsoft.com/ce93c969-15b4-40a4-955a-df7f23cda5b2?id=784674465>> | Reset PIN
<<https://mysettings.lync.com/pstnconferencing>>

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<https://www.sba.gov/sites/all/themes/smallbizd7/images/SBA_logo.png>

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Cc: Lintz, Dana E. <Dana.Lintz@sba.gov>; Confesor, Nazly <Nazly.Confesor@sba.gov>; Etheridge, Ronald A. <Ronald.Etheridge@sba.gov>; Bradley, Kim L. <Kim.Bradley@sba.gov>
Subject: Re: 2020 Briefing Book - printing and binding

Hi, team! I echo Steve's thanks.

In terms of a heads up, we'll be looking for two more transition briefing books.

(b) (5) [REDACTED]

[REDACTED]

[REDACTED]

Thanks much, and let me know if you need anything else!

Best,
Dan

From: Thorpe, Tanisha M. <Tanisha.Thorpe@sba.gov>
Date: Friday, October 30, 2020 at 3:51 PM
To: Kong, Stephen D. <Stephen.Kong@sba.gov>, Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Cc: Lintz, Dana E. <Dana.Lintz@sba.gov>, Confesor, Nazly <Nazly.Confesor@sba.gov>, Etheridge, Ronald A. <Ronald.Etheridge@sba.gov>, Bradley, Kim L. <Kim.Bradley@sba.gov>
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Thank you Tanisha! Yes, I would need a copy by COB—I have to certify to the White House by Sunday that we have completed the book for their possible arrival (depending on what happens Nov 3) on Wednesday.

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Thank you,

Tanisha M. Thorpe
Office of the Executive Secretariat
Office of Executive Management, Installations
& Support Services

U.S. Small Business Administration

Office: (202) 205-9984
Mobile: (202) 821-3596
tanisha.thorpe@sba.gov



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Cc: Kong, Stephen D. <Stephen.Kong@sba.gov>; Lintz, Dana E. <Dana.Lintz@sba.gov>
Subject: Re: 2020 Briefing Book - printing and binding

Hi Tanisha,

I'd like it complete by this afternoon so that Steve can review this weekend. All of the documents can be found at the link I sent Wednesday. Let me know if you need anything else from my end.

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Good morning!

I'll take care of printing the last three documents that we received. Where should I find the paper version of what we have now?

Thanks much!

Best,
Dan

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Sent: Wednesday, October 28, 2020 10:22 AM
To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>; Confesor, Nazly <Nazly.Confesor@sba.gov>
Cc: Kong, Stephen D. <Stephen.Kong@sba.gov>; Lintz, Dana E. <Dana.Lintz@sba.gov>
Subject: RE: 2020 Briefing Book - printing and binding

Hi, Dan:

Thank you.

Naz, I am in the office today so I'll begin printing.

Tanisha

From: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
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To: Confesor, Nazly <Nazly.Confesor@sba.gov>; Thorpe, Tanisha M. <Tanisha.Thorpe@sba.gov>
Cc: Kong, Stephen D. <Stephen.Kong@sba.gov>
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Hi team,

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You can use the [REDACTED] as a way to track what needs to be added and tabbed.

The final versions to be printed are located here:

(b) (5)
[REDACTED]

We're looking for a tab for each of the Sections – Tab 1 for SBA Overview, Tab 2 for Human Resources, etc.

Thanks so much for your help and let me know if you need anything else!

Best,
Dan

Daniel J. Kurtenbach
White House Fellow
U.S. Small Business Administration
(202) 940-6367

From: [Kurtenbach, Daniel J.](#)
To: [Confesor, Nazly](#)
Cc: [Lintz, Dana E.](#); [Etheridge, Ronald A.](#); [Bradley, Kim L.](#); [Thorpe, Tanisha M.](#); [Kong, Stephen D.](#)
Subject: Re: 2020 Briefing Book - printing and binding
Date: Tuesday, November 17, 2020 5:36:33 PM
Attachments: [image003.png](#)

Nazly and team,

Thanks so much for your work on this – have a great rest of your week and a nice Thanksgiving holiday.

Best,
Dan

From: Confesor, Nazly <Nazly.Confesor@sba.gov>
Date: Tuesday, November 17, 2020 at 5:26 PM
To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Cc: Lintz, Dana E. <Dana.Lintz@sba.gov>, Etheridge, Ronald A. <Ronald.Etheridge@sba.gov>, Bradley, Kim L. <Kim.Bradley@sba.gov>, Thorpe, Tanisha M. <Tanisha.Thorpe@sba.gov>, Kong, Stephen D. <Stephen.Kong@sba.gov>
Subject: RE: 2020 Briefing Book - printing and binding

Mr. Kurtenbach:

The two binders and the original binder were delivered to Mr. Kong.

Thank you.

Best regards,

Nazly Confesor
Office of Executive Secretariat
Office of Executive Management, Installations
& Support Services
U.S. Small Business Administration
Tel: (202) 205.7714



U.S. Small Business
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Sent: Tuesday, November 17, 2020 4:26 PM

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Cc: Lintz, Dana E. <Dana.Lintz@sba.gov>; Etheridge, Ronald A. <Ronald.Etheridge@sba.gov>; Bradley, Kim L. <Kim.Bradley@sba.gov>; Thorpe, Tanisha M. <Tanisha.Thorpe@sba.gov>; Kong, Stephen D. <Stephen.Kong@sba.gov>

Subject: Re: 2020 Briefing Book - printing and binding

Hi Nazly,

[REDACTED]

[REDACTED]. If possible, can we please print those off and add them to the two briefing books?

Thanks much!

Best,
Dan

From: Confesor, Nazly <Nazly.Confesor@sba.gov>

Date: Tuesday, November 17, 2020 at 4:09 PM

To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>

Cc: Lintz, Dana E. <Dana.Lintz@sba.gov>, Etheridge, Ronald A. <Ronald.Etheridge@sba.gov>, Bradley, Kim L. <Kim.Bradley@sba.gov>, Thorpe, Tanisha M. <Tanisha.Thorpe@sba.gov>, Kong, Stephen D. <Stephen.Kong@sba.gov>

Subject: RE: 2020 Briefing Book - printing and binding

Good afternoon Mr. Kurtenbach:

The request to create two more binders is completed. (b) (5)

[REDACTED]

Overall, the binders are good to go. I will give back the original binder to Mr. Kong shortly.

Thank you.

Best regards,

Nazly Confesor
Office of Executive Secretariat
Office of Executive Management, Installations
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(b) (5) [REDACTED]

[REDACTED]

[REDACTED]

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Office: (202) 205-9984
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White House Fellow
U.S. Small Business Administration
(202) 940-6367

From: [Kurtenbach, Daniel J.](#)
To: [Jonathan Swain](#); [Perriello, Tami L.](#)
Cc: [Kong, Stephen D.](#)
Subject: RE: A few follow ups
Date: Monday, January 18, 2021 4:17:00 PM

No worries, I'll set something up for tomorrow at 4:30pm.

Best,
Dan

From: Jonathan Swain <jswain@ptt.gov>
Sent: Monday, January 18, 2021 4:06 PM
To: Perriello, Tami L. <Tami.Perriello@sba.gov>
Cc: Kong, Stephen D. <Stephen.Kong@sba.gov>; Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Subject: Re: A few follow ups

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Tami - It looks like 4:30-5pm tomorrow will work best on our end.

I left Dan off this email chain by mistake, adding him now, hoping he can help with either a Team invite or conference line, whichever you prefer.

On our end, the attendees will be myself, **Arthur Plews** and **Michael Roth** (who as I mentioned is hopefully going to be onboard in a leadership role by noon on Wednesday and will be working directly with you in the early days as more members of the team come on board.)

And, thank you for the written responses to my initial questions. This is very helpful.

Jonathan

On Mon, Jan 18, 2021 at 2:48 PM Perriello, Tami L. <Tami.Perriello@sba.gov> wrote:

Jonathan:

I am free tomorrow at 11, 3:30 and 4:30 for a phone call. Please let me know if any of these times will work.

Please see my comments on your questions below – while we have made some good progress, there are quite a few complex issues hanging at this time and decisions on them need to be fast-tracked.

Thanks
Tami

From: Jonathan Swain <jswain@ptt.gov>
Sent: Monday, January 18, 2021 1:10 PM
To: Perriello, Tami L. <Tami.Perriello@sba.gov>
Cc: Kong, Stephen D. <Stephen.Kong@sba.gov>
Subject: A few follow ups

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Tami - (b) (5)
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[REDACTED]

Thank you in advance.

Jonathan

From: [Kurtenbach, Daniel J.](#)
To: [Jonathan Swain](#)
Subject: RE: A few follow ups
Date: Monday, January 18, 2021 4:44:00 PM

Jonathan,

Thanks so much – it's been a pleasure and honor to work with you and your team.

Please do reach out if you need anything else, and I look forward to working with those members of the ART that are joining (or re-joining) the SBA!

Best,
Dan

From: Jonathan Swain <jswain@ptt.gov>
Sent: Monday, January 18, 2021 4:38 PM
To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Subject: Re: A few follow ups

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Thanks. (b) (5)

[REDACTED]

[REDACTED]

[REDACTED]

I wrap up my transition work at the end of the day tomorrow, and with that I want to say again thanks for all of your help through this process. It has been great working with you. I know the incoming team will appreciate having you on board and engaged in the weeks and months ahead.

Jonathan

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Best,
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Cc: Kong, Stephen D. <Stephen.Kong@sba.gov>; Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Subject: Re: A few follow ups

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To: Perriello, Tami L. <Tami.Perriello@sba.gov>
Cc: Kong, Stephen D. <Stephen.Kong@sba.gov>
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Tami - (b) (5)

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[REDACTED]

[REDACTED]

(b) (5) [Redacted]
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Thank you in advance.

Jonathan

From: [Kurtenbach, Daniel J.](#)
To: jgreen@afge2959.org
Cc: ["Jonathan Swain"; "Ellen Kim"; "Michele Chang"; "Michael Chodos"; Kong, Stephen D.; jgreen@afge2959.org; Green, Johnnie D.](#)
Subject: Re: AFGE Local 228 SBA Outlines Priorities for Incoming Biden Administration DAY 1. As of Tuesday, December 29, 2020. Time: 4:47 am cst.
Date: Tuesday, December 29, 2020 10:54:05 AM
Attachments: [image001.png](#)

Thanks, Johnnie.

Best,
Dan

From: jgreen@afge2959.org <jgreen@afge2959.org>
Date: Tuesday, December 29, 2020 at 5:47 AM
To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Cc: 'Jonathan Swain' <jswain@jbrpt.org>, 'Ellen Kim' <EEKIM@jbrpt.org>, 'Michele Chang' <mchang@jbrpt.org>, 'Michael Chodos' <mchodos@jbrpt.org>, Kong, Stephen D. <Stephen.Kong@sba.gov>, jgreen@afge2959.org <jgreen@afge2959.org>, Green, Johnnie D. <Johnnie.Green@sba.gov>
Subject: AFGE Local 228 SBA Outlines Priorities for Incoming Biden Administration DAY 1. As of Tuesday, December 29, 2020. Time: 4:47 am cst.

CAUTION - The sender of this message is external to the SBA network. Please use care when clicking on links and responding with sensitive information. Send suspicious email to spam@sba.gov.

Mr. Kurtenbach,

Good Morning! At your request, below are our AFGE Local 228 feedback I received from the SBA Bargaining Unit Employees recommendation for the Biden Team Day 1 priorities at SBA. Please review all the Biden Team Day 1 information AFGE Local 228 have received from the SBA Bargaining unit Employees. I continue to collect information from the SBA Bargaining Unit Employees. Feel free to contact me at: (501) 413-7211 if you have any questions. Email address: johnnie.green@sba.gov; jgreen@afge2959.org

AFGE Local 228 SBA Outlines Priorities for Incoming Biden Administration DAY 1.

As of Tuesday, December 29, 2020

As the Biden-Harris administration is set to take office on Jan. 20, AFGE Local 228 is eager to work with the administration to repair, restore, and “Build Back Better” Americans’ trust and respect for the federal government.

Below are our AFGE Local 228 Recommendation for SBA to the Biden-Harris Transition Team for Day 1.

Here are [our recommendations](#), as submitted to the Biden-Harris transition team, for the best way to make that happen for the American people:

Things AFGE Local 228 Is Asking Biden to Do on Day 1

- **Withdraw the May 2018 Executive Orders (EOs) targeting workers' rights**
- **On May 25, 2018, the president issued the three EOs (13836, 13837 and 13839) that seek to undermine workers and their unions. These EOs (1) expedite the process for removing federal employees in performance-based adverse actions; (2) reduce the use of union representational official time governmentwide; (3) reduce the subjects that agencies and unions can negotiate; and (4) arbitrarily impose time limits to conclude negotiations on collective bargaining agreements.**
- **These EOs also direct agencies to reopen collective bargaining agreements and impose unfavorable terms on federal workers while encouraging agencies to adopt policies that undermine fairness concepts such as progressive discipline, performance improvement plans, seniority, and grievance filings for performance appraisals. The EOs' results have undermined the ability of labor and management to collaborate to the benefit of the employees and taxpayers and have instead promoted a hostile work environment.**
- **Rescind an EO that politicizes the hiring of administrative law judges**
- **Trump's lesser known EO 13843 politicizes the hiring of federal administrative law judges (ALJs) by shifting the impartial and rigorous selection of ALJs from the Office of Personnel Management (OPM) to the agencies themselves, thereby opening the door for political appointees to hire ALJs based on their political leanings rather than their qualifications. ALJ selection process should revert to the objective OPM process under a rigorous timetable of no more than six months.**
- **SBA Veterans who were not hired under VRA but should have being able to get promoted up to GS 11. We have SBA Veterans not hired under the VRA Program that have been GS 5, GS 9, the past 15 years and some has retired without being promoted.**

Rescind the Schedule F EO

The Schedule F EO issued on Oct. 21, 2020, will negatively affect tens of thousands of federal workers as it allows for political appointees to be embedded into the civil service, opens the door for the dismantling of collective bargaining units, and renders tens of thousands of federal workers at-will employees with no due process protections against unwarranted adverse actions, especially removals.

Remove members of the Federal Service Impasses Panel (FSIP)

FSIP is part of the Federal Labor Relations Authority and has been used by the Trump

administration to impose anti-worker, anti-union agency contract proposals on federal workers. All members of the FSIP should be removed and new members appointed. The president is free to remove and appoint new FSIP members at any time without Senate confirmation.

Things AFGE Local 228 Is Asking Biden to Do within the First 100 Days

1. **Settle the AFGE Local 228 National \$40MM overtime case being handled by the Law Offices of Snider and Associated.**



AFGE Council 228 vs. Small Business Administration In May of 2015, AFGE Council 228, representing employees in almost all Small Business Administration offices nationwide, filed a grievance against the SBA on behalf of all bargaining unit employees. The Grievance alleged violations [...]

AFGE Council 228 vs. Small Business Administration: In May of 2015, AFGE Council 228, representing employees in almost all Small Business Administration offices nationwide, filed a grievance against the SBA on behalf of all bargaining unit employees. The Grievance alleged violations of the Fair Labor Standards Act (FLSA) and Title V (FEPA), among other violations.

The Law Offices of Snider and Associates, as the legal representatives for the Union, are working hard for the bargaining unit employees to ensure that their rights under federal law are upheld. As part of the process, we have been contacting SBA employees about their job duties and how much unpaid overtime they have worked.

The Agency failed to timely respond to the Grievance, which necessitated a second grievance and eventually, an Arbitrator was required to be selected because the Agency disputed that the Union's grievances were properly filed. In May of 2017, Arbitrator Dr. Andree McKissick ruled in the Union's favor in all aspects and that the case will proceed before her to resolution. The Agency has appealed the decision to the FLRA, and the Parties await that ruling. All bargaining unit employees, whether or not they are members of the union, and regardless of position or pay grade, are covered by this grievance and could potentially benefit from a successful result.

1. The EO dealing with 3 ones issued in 2018 limiting union activity and eliminating the requirement that length of service would be diminished in determining RIFs
2. The Schedule F must be terminated on Day 1. This one concerns putting political commissars as fed employees.
3. SBA need to update their computer system, servers and upgrade those systems to

work more efficiently because there more than 170 employees in the bureau including those hired this year per the CARES Act.

4. **AFEG Local 228 Request the Termination of the following Executives Orders: Executive Orders 13836, 13837 and 13839 which strip rights from employees and attacked unions; and which were lawlessly implemented by SBA on 7/17/20 Executive Order 13957: creates schedule F**
5. **Place Military Veteran hired under VRA like they should have been hired. Many of them at this agency are GS 5 and GS 7.**
6. **Increase Capital Formation and Human Capital formation within SBA.**
7. **More SBA Virtual Teleworking Job Positions Requested by AFGE Local 228.**
8. **AFGE Local 228 request that existing SBA Employees with confirmed issues per the CDC Guidelines be allowed permanent Teleworking, childcare and adult care be change over to Virtual Teleworking Position Nationally. Workplace Bulling and Retaliation. Hot Spot Offices Around the Country that the union are aware of such as: SBA Birmingham, DLSC, SBA Michigan District Office, SBA Herndon National Liquidation Center which are just a few. I continue to collect more information. Increase SBA Employee Bonus and Promotion Opportunities.**
9. **Permanent Telework for all SBA Employees with underling heath Issues and adult and childcare issue due to many SBA employees take care of their parents, Grandparents with specials needs.**
10. **Terminate all Executive Orders.**
11. **Change many of the SBA Job Positions to Virtual telework position.**
12. **Appoint members to important labor relations and employee due process independent agencies.**
13. **Direct agencies to avail themselves of interest arbitration, bypassing the cumbersome FSIP process when there's an impasse.**
14. **Affirm the rights of the SBA and VA's Title 38 employees to join and serve their local unions.**
15. **Grant full collective bargaining rights to SBA Employees, Transportation Security Officers (TSOs). Put TSOs who are paid at the TSO D, TSO E and TSO F pay bands under the General Schedule pay system. Reopen the collective bargaining agreement with AFGE. Seek a legislative fix to eliminate the footnote in the Aviation and Transportation Security Act (ATSA) authorizing the TSA administrator to develop a separate personnel management system and pay system for TSOs.**
16. **Sign an EO to establish SBA labor management partnerships and forums.**
17. **Sign an EO to protect retirement benefits for disabled federal workers, such as SBA Employees, law enforcement officers, customs and border protection officers, and firefighters.**
18. **Direct OPM to rescind new rules that eliminate back pay for overtime disputes and impose an exclusion of unions from eligibility for attorneys' fees.**

19. SBA employees would like to see more of the jobs that can be done virtually/anywhere open to where employees can get promoted but not have to move. If these positions can be done via a detail for months on end, why are employees selected for the same permanent positions required to be in DC? I know this doesn't work for all departments like Field Offices where local travel and relationships are required, but why can't an OIT position that serves an entire region be stationed out of any field office in the region (knowing regional travel is required) rather than be required to move to a specific city? Some positions are listed with several possible locations, but during the interview you're told that's not the case and they want the person selected to be in a specific city, basically a bait and switch. The Agency has tools like Teams, GMATT and SharePoint so that supervisors/managers should still be able to make sure the work is getting done.
20. Request that supervisors stop disclosure of personal information about employees to their colleagues or others as an act of retaliation and monitor the performance appraisal process.

The Privacy Act of 1974, a United States federal law, establishes a Code of Fair Information Practice that governs the collection, maintenance, use, and dissemination of personally identifiable information about individuals that is maintained in systems of records by federal agencies. A system of records is a group of records under the control of an agency from which information is retrieved by the name of the individual or by some identifier assigned to the individual. The Privacy Act requires that agencies give the public notice of their systems of records by publication in the Federal Register. The Privacy Act prohibits the disclosure of information from a system of records absent of the written consent of the subject individual, unless the disclosure is pursuant to one of twelve statutory exceptions. The Act also provides individuals with a means by which to seek access to and amendment of their records and sets forth various agency record-keeping requirements. Additionally, with people granted the right to review what was documented with their name, they are also able to find out if the "records have been disclosed" and are also given the rights to make corrections.

21. Privacy Act Exemptions. The Privacy Act (5 USC 552a) generally provides that any person has a right – enforceable in court – of access to federal agency records in which that person is a subject, except to the extent that such records (or portions thereof) are protected from disclosure by one of nine exemptions. The exemption does not apply in this matter, disclosing to staffers is reasons to discuss Privacy Reminders 12. Privacy Act "Exceptions" The Privacy Act of 1974, as amended, includes 12 exceptions under which DLA may disclose information about an individual without their written consent. These disclosures may be made within and/or outside DoD. The 12 exceptions allow disclosure: 1. To those officers and employees of the agency which maintains the record, who have a need for the record in the performance of their duties. 2. When the disclosure is made under the Freedom of Information Act (5 U.S.C. § 552). 3. For an established routine use (routine use must be published as part of the system of records

notice). 4. To the Census Bureau for the purposes of planning or carrying out a census or survey. 5. To someone who has adequately notified the agency in advance that the record is to be used for statistical research or reporting and the record is transferred without individually identifying data. 6. To the National Archives and Records Administration as a record of historical value. 7. To another agency or to an instrumentality of any governmental jurisdiction, within or under the control of the United States for a civil or criminal law enforcement activity, if the activity is authorized by law, and if the head of the agency or instrumentality has made a written request to the agency which maintains the record specifying the particular portion desired and the law enforcement activity for which the record is sought. 8. To a person under compelling circumstances affecting someone's health or safety, and the person whose health or safety is affected is sent a notification of the disclosure. 9. To either House of Congress, or, to the extent of matter within its jurisdiction, any committee or subcommittee thereof, any joint committee of Congress or subcommittee of any such joint committee. 10. To the Comptroller General in the course of the duties of the General Accountability Office. 11. Pursuant to the order of a court of competent jurisdiction. 12. To a consumer reporting agency in accordance with section 31 U.S.C. §3711(f). 2. In addition to monitor the performance appraisal process as certain employees receive a rating of 5 every three (3) year, and other employees are overlooked.

22. **AFGE Local 228 Request that SBA Employees who line in states, cities and towns that are COVID-19 Pandemic Hot Spots be allowed permanent Teleworking.**
23. **AFGE Local 228 Request Increase Bonus's, Promotion and long term Telework.**
24. **AFGE Local 228 Request Clarification of Unit: management appears to have made a practice of removing employees from the bargaining unit over several years- this has been difficult for the union to track, since we do not receive notification of these changes. Most recently, it appears term loan specialists at the Centers have been removed from the bargaining unit.**
25. **AFGE Local 228 Request Post pandemic, telework is an issue: even during the pandemic, the reconstitution plan was not evenly enforced; and managers have already begun to inform employees that a "return to normal" will mean telework at a pre-pandemic level; those managers are planning on unlearning the lessons of the past year and revoking telework, contrary to the law and the MLA. Meanwhile, other agencies have already testified that they plan on keeping expanded telework.**
26. **AFGE Local 228 Request As a note, if they are not aware, the Agency published notice of rulemaking for "regulatory streamlining" on 12/14/20 in the Federal Register at RIN 3245-AG98 and a rule rescission relating to PPP at RIN 3245-AG 74. I do not have a position on these changes, but the transition team should be aware of these changes.**
27. **More SBA Employees should be promoted. SBA Employee should be retiring at a grade of GS 5, 7, 9, 11 or 12. Especially when these SBA Employees are always on the**

- frontline doing the work and providing the first line of communication for the SBA.
28. More Resources, staffing and bonuses for the SBA District officers. and SBA District Offices are the face and foundation of the agency. No District Office employee should be no lower than a GS 13. SBA Center personal on the frontline should not be less than a GS 13. Why, they are the face and foundation of the SBA. These frontline workers are SBA. Maybe Biden Team need to consider cutting back on SES and GS 15 hiring and reallocating these federal proceed and resources to the lower graded employees, GS-5, GS 7, GS 9, GS 11, GS 12.
 29. The agency must understand that the country is dealing with a pandemic that adversely impact SBA Employees life's. Our SBA employees have families and other things that impact their lives, such as school closings, childcare, adult elderly family care, personal health issues, and deaths. We have SBA employees losing family members every day across the country. Biden Team must understand that SBA Employees did not land on the COVID-19 PANDEMIC, the COVID-19 PANDEMIC LANDED ON THEM AND THEIR FAMILIES. The world will overcome the COVID-19 PANDEMIC not because the countries are great, but the people that make up the countries in the world are great! The SBA was great before the COVID-19 Pandemic and the SBA Employees and the United States Citizens will be ever greater after the COVID-19 Pandemic. I
 30. SBA Employees are being harassed and retaliated against by some SBA management officials, that needs to stop on day one of the Biden Administration.
 31. The Agency and Union should always try to work together to achieve common goals that are: the agency's mission, stakeholder-both internal and external interests, Agency employees keeping themselves and their families safe during the COVID-19 pandemic. Many of our SBA employees will have an extra chair at the dinner table this year during this holiday season due to the loss of a family member.
 32. Keep in mind the union is the only lifeline the SBA Bargaining Unit Employees have in some cases. The union works 24 hours, 7 days a week in protecting the interest of the SBA employees and their families. Take a few minutes and review the date and time that I am responding to emails from HR, my union email response times are usually in the early a.m. and late evening.
 33. The agency should have policies that promote the practicing of social distancing and wearing a mask
 34. SBA Employees Bargaining Unit Employees bottom line feedback continue to be to terminate all Executive Day 1.
 35. Increase telework and make teleworking permanent. Provide more promotions for GS 5, 7, 9, 11, and 12's.
 36. Increase bonuses, allow The SBA employees to transfer to other departments so they can get promoted.
 37. To many supervisors, GS 15's and SES Positions. Do not keep the same supervisors, managers, Deputy Directors, Center Directors, SES's, and District Directors in same

positions for no longer than 24 months (2 Years).

38. Increase resources, bonus opportunities, promotions, and resources the increase Human Capital Formation and Capital Formation for both the internal and external stakeholder.
39. Eliminate all bullying and retaliation.
40. Reduce the personnel and staffing assigned to the Office of Capital Access in Washington DC.
41. Increase SBA District Office Personnel and staffing needs to be increased in the field.
42. All promotions and bonuses should start with those SBA employees who work on the frontline.
43. Increase promotion opportunities in OCIO and more capital resources for technology.
44. Increase technology is the key for both internal and external stakeholder success. Especially during a COVID-19 PANDEMIC.

Please confirm receipt.

Duty and Honor In Solidarity,

Johnnie D. Green, Disabled Veteran, **“Duty and Honor”**

President AFGE SBA Local 228 (National Local)

PO Box 7406

Little Rock, Arkansas 72217

Website: www.AFGE228.org

Email: jgreen@afge2959.org

Cell: (501) 413-7211

Union Office: (501) 324-5871 ext. 365

Fax: (202) 481-4681



Click the logo above to visit

AFGE Local 2959, AFGE website: www.afge2959.org

“The ultimate measure of a man is not where he stands in moments of comfort and convenience, but where he stands at times of challenge and

controversy.” ---Martin Luther King, Jr.

--“Be Kind To Everyone You Meet, For Everyone You Meet Is Fighting Their Own Battles In Life Too.”

--“The Needs Of People Is Everyday Of Kindness And Service”

From: [Kurtenbach, Daniel J.](#)
To: [DeFosset III, Donald](#); [Morris, Thomas G.](#); [Kong, Stephen D.](#)
Subject: Re: Agenda for OII Transition Sync 12/2
Date: Monday, November 30, 2020 10:50:38 AM

Moved to Thursday at 2pm. Thanks.

Best,
Dan

From: DeFosset III, Donald <Donald.DeFossetIII@sba.gov>
Date: Monday, November 30, 2020 at 10:41 AM
To: Morris, Thomas G. <thomas.morris@sba.gov>, Kong, Stephen D. <Stephen.Kong@sba.gov>
Cc: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Subject: RE: Agenda for OII Transition Sync 12/2

Works for me

From: Morris, Thomas G. <thomas.morris@sba.gov>
Sent: Monday, November 30, 2020 10:41 AM
To: Kong, Stephen D. <Stephen.Kong@sba.gov>
Cc: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>; DeFosset III, Donald <Donald.DeFossetIII@sba.gov>; Morris, Thomas G. <thomas.morris@sba.gov>
Subject: RE: Agenda for OII Transition Sync 12/2

Thursday would be much better if that would work for everyone's schedule.

Best,
Tom

From: Kong, Stephen D. <Stephen.Kong@sba.gov>
Sent: Monday, November 30, 2020 10:39 AM
To: Morris, Thomas G. <thomas.morris@sba.gov>
Cc: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Subject: RE: Agenda for OII Transition Sync 12/2

It is at 11. Maybe we should push it a day. CC'ing Dan.

From: Morris, Thomas G. <thomas.morris@sba.gov>
Sent: Monday, November 30, 2020 10:37 AM
To: Kong, Stephen D. <Stephen.Kong@sba.gov>
Cc: Morris, Thomas G. <thomas.morris@sba.gov>
Subject: RE: Agenda for OII Transition Sync 12/2

Steve,

(b) (6). What time is the call initial transition call scheduled. I could if all goes well probably be available by mid afternoon.

Best,
Tom

From: Kong, Stephen D. <Stephen.Kong@sba.gov>
Sent: Monday, November 30, 2020 9:09 AM
To: DeFosset III, Donald <Donald.DeFossetIII@sba.gov>; Newsome, Ryan J. <Ryan.Newsome@sba.gov>; Morris, Thomas G. <thomas.morris@sba.gov>; Spivey, Arthur A. <arthur.spivey@sba.gov>
Subject: FW: Agenda for OII Transition Sync 12/2

Please see below

From: Meredith Shaffer <mshaffer@jbrpt.org>
Sent: Monday, November 30, 2020 9:04 AM
To: Kong, Stephen D. <Stephen.Kong@sba.gov>; Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Cc: Ellen Kim <EEKIM@jbrpt.org>; Isabel Guzman <iguzman@jbrpt.org>; Clifton Kellogg <ckellogg@jbrpt.org>
Subject: Agenda for OII Transition Sync 12/2

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Good morning,

Below are the high-level agenda items we'd like to try to cover during our initial call with OII leadership on Wednesday 12/2, time permitting.

- Current state of the office
- SBIC drill down
- STTR/SBIR
- Growth Accelerator program
- Personnel/Staffing

The members from the transition team who will be joining the call are:

Isabel Guzman
Ellen Kim
Cliff Kellog
Meredith Shaffer

Please don't hesitate to let us know if you have any questions. We look forward to the discussion.

Best,
Meredith

From: [Kurtenbach, Daniel J.](#)
To: [Meredith Shaffer](#); [Kong, Stephen D.](#)
Cc: [Ellen Kim](#); [Isabel Guzman](#); [Clifton Kellogg](#)
Subject: Re: Agenda for OII Transition Sync 12/3
Date: Wednesday, December 2, 2020 2:47:32 PM

Please see below and let me know if you have any questions.

Donald DeFossett III
Ryan Newsome
Leah Franklin
Thomas Morris
John Williams

Best,
Dan

From: Meredith Shaffer <mshaffer@jbrpt.org>
Date: Wednesday, December 2, 2020 at 2:24 PM
To: Kong, Stephen D. <Stephen.Kong@sba.gov>, Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Cc: Ellen Kim <eekim@jbrpt.org>, Isabel Guzman <iguzman@jbrpt.org>, Clifton Kellogg <ckellogg@jbrpt.org>
Subject: Re: Agenda for OII Transition Sync 12/3

CAUTION - The sender of this message is external to the SBA network. Please use care when clicking on links and responding with sensitive information. Send suspicious email to spam@sba.gov.

Dan and Steve,

We are looking forward to tomorrow's discussion with the OII team (apologies, I incorrectly noted 12/2 in my email). Would you mind sharing attendees from SBA when you can?

Best,
Meredith

On Mon, Nov 30, 2020 at 9:08 AM Kong, Stephen D. <Stephen.Kong@sba.gov> wrote:

Thanks Meredith—will pass on to OII leadership.

From: Meredith Shaffer <mshaffer@jbrpt.org>
Sent: Monday, November 30, 2020 9:04 AM
To: Kong, Stephen D. <Stephen.Kong@sba.gov>; Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Cc: Ellen Kim <eekim@jbrpt.org>; Isabel Guzman <iguzman@jbrpt.org>; Clifton Kellogg <ckellogg@jbrpt.org>
Subject: Agenda for OII Transition Sync 12/2

CAUTION - The sender of this message is external to the SBA network. Please use care when clicking on links and responding with sensitive information. Send suspicious email to spam@sba.gov.

Good morning,

Below are the high-level agenda items we'd like to try to cover during our initial call with OII leadership on Wednesday 12/2, time permitting.

- Current state of the office
- SBIC drill down
- STTR/SBIR
- Growth Accelerator program
- Personnel/Staffing

The members from the transition team who will be joining the call are:

Isabel Guzman

Ellen Kim

Cliff Kellog

Meredith Shaffer

Please don't hesitate to let us know if you have any questions. We look forward to the discussion.

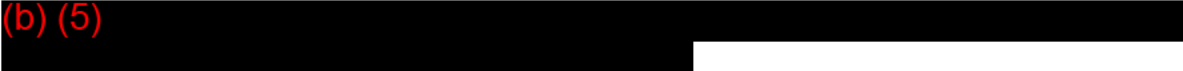
Best,

Meredith

From: [Kurtenbach, Daniel J.](#)
To: [Plews, Arthur G.](#)
Subject: RE: BCG report
Date: Wednesday, February 10, 2021 9:36:00 AM
Attachments: [2021.01.27 SBA Weekly Update Materials - AA and OED vSENT.pdf](#)
[2021.01.29 ODA EIDL After Action Report Key Findings vFinal.pdf](#)
[2020.01.29 ODA EIDL After Action Report vFinal.pdf](#)

Hi Arthur,

(b) (5)



I'll accept your calendar invite as I'm glad to help where I can – let me know if you still want to meet.

Dan

From: Plews, Arthur G. <Arthur.Plews@sba.gov>
Sent: Tuesday, February 9, 2021 11:45 PM
To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Subject: BCG report

Hi Dan,



-Arthur

From: [Kurtenbach, Daniel J.](#)
To: [Rubio Ritter, Ilene P.](#)
Subject: RE: Brief Transition Update ***PLEASE DO NOT FORWARD--FOR TRANSITION POCs ONLY***
Date: Friday, November 27, 2020 11:54:00 AM
Attachments: [image001.png](#)
[image002.png](#)

Done, thanks much Ilene.

Best,
Dan

From: Rubio Ritter, Ilene P. <Ilene.Rubio@sba.gov>
Sent: Friday, November 27, 2020 10:48 AM
To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Subject: RE: Brief Transition Update ***PLEASE DO NOT FORWARD--FOR TRANSITION POCs ONLY***

Good Morning Dan – how are you doing? I hope you and your family had a wonderful Thanksgiving.

I reviewed the 7b GAO Priority Recommendations section of the transition site, and it appears the page numbering was out of place (i.e. page 2 was appearing as page 4). Attached is the updated file with the correct page numbering. Can you please update this correct file to the site?

Thank you, Dan.
Ilene

Ilene P. Rubio Ritter
Senior Advisor
Office of Continuous Operations and Risk Management (OCORM)
U. S. Small Business Administration (SBA)
409 3rd Street SW, 5th Floor – Room 5002
Washington, DC 20416
E-Mail: Ilene.rubio@sba.gov
Telephone: (202) 505-9726



[Home Page](#) | [Twitter](#) | [Instagram](#) | [Facebook](#) | [YouTube](#) | [LinkedIn](#) | [Email Alerts](#)

From: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Sent: Friday, November 27, 2020 10:41 AM
To: Kong, Stephen D. <Stephen.Kong@sba.gov>; Mutz, Martina A. <Martina.Mutz@sba.gov>; Rowen, Dolores F. <dolores.rowen@sba.gov>; Contreras, Alejandro C. <alejandrow.contreras@sba.gov>; Sutch, Zina B. <Zina.Sutch@sba.gov>; Walker, Gaye T. <Gaye.Walker@sba.gov>; Crean, Sean F. <Sean.Crean@sba.gov>; Taylor, Sharon A.

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[REDACTED]

If there are questions about where your sections fit, please refer to the attached Table of Contents.

Thanks, and please reach out with questions.

Best,
Dan

Daniel J. Kurtenbach
White House Fellow
U.S. Small Business Administration
(515) 231-5805

From: Kong, Stephen D. <Stephen.Kong@sba.gov>

Sent: Tuesday, November 24, 2020 8:11 AM

To: Mutz, Martina A. <Martina.Mutz@sba.gov>; Rowen, Dolores F. <dolores.rowen@sba.gov>; Contreras, Alejandro C. <alejandro.contreras@sba.gov>; Sutch, Zina B. <Zina.Sutch@sba.gov>; Walker, Gaye T. <Gaye.Walker@sba.gov>; Crean, Sean F. <Sean.Crean@sba.gov>; Taylor, Sharon A. <sharon.taylor@sba.gov>; Brill, Julie <Julie.Brill@sba.gov>; Biaggi-Ayer, Denise A. <Denise.Biaggi-Ayer@sba.gov>; Wales, Mina A. <Mina.Wales@sba.gov>; Green, Timothy A. <Timothy.Green@sba.gov>; Clark III, Major L. <Major.Clark@sba.gov>; Vallante, Michael A. <Michael.Vallante@sba.gov>; Weaver, Christopher L. <Christopher.Weaver2@sba.gov>; Biles, Brittany W <Brittany.Biles@sba.gov>; Greene, Loretta S. <Loretta.Greene@sba.gov>; Gibson, Patricia M <Patricia.Gibson@sba.gov>; Yousefi, Mandana <mandana.yousefi@sba.gov>; Miller, John A. <John.Miller@sba.gov>; Lisaius, Jennifer F. <Jennifer.Lisaius@sba.gov>; Coffield, Andrew J. <Andrew.Coffield@sba.gov>; Rubio Ritter, Ilene P. <Ilene.Rubio@sba.gov>; Bossie, Jason <Jason.Bossie@sba.gov>; Nicholson, James R. <James.Nicholson@sba.gov>; Bennett, Patty A. (Temp) <Patty.Bennett@sba.gov>; West, Jacqueline B. <Jacqueline.West@sba.gov>; Cheeks, Raymond A. <Raymond.Cheeks@sba.gov>; Dickens, Valencia D. <Valencia.Dickens@sba.gov>; DeFosset III, Donald <Donald.DeFossetIII@sba.gov>; Morris, Thomas G. <thomas.morris@sba.gov>; Fishman, David A. <david.fishman@sba.gov>; Hunter, Karen L. <Karen.Hunter@sba.gov>; Cantlon, James D. <James.Cantlon@sba.gov>; Westbrook, Jonathon (Temp) <Jonathon.Westbrook@sba.gov>; Hernandez, Elias <elias.hernandez@sba.gov>; Gray, Christopher S. <Christopher.Gray@sba.gov>; Hershey, Michael S <Michael.Hershey@sba.gov>; Nelson, Nicole M. <Nicole.Nelson@sba.gov>; Perriello, Tami L. <Tami.Perriello@sba.gov>; Manger, William M. <William.Manger@sba.gov>; Kupfer, Jeffrey F. <Jeffrey.Kupfer@sba.gov>; Ford, Delorice Price <delorice.ford@sba.gov>; Bluestein, Keith A. <Keith.Bluestein@sba.gov>; Monchek, Rafaela <Rafaela.Monchek@sba.gov>; Spampinato, Francis C. <Francis.Spampinato@sba.gov>; Rivera, James E. <james.rivera@sba.gov>; Gutierrez, Allen M <Allen.Gutierrez@sba.gov>; Richards, Amber G. <Amber.Richards@sba.gov>

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Subject: RE: Brief Transition Update ***PLEASE DO NOT FORWARD--FOR TRANSITION POCs ONLY***

PLEASE DO NOT FORWARD

Hi everyone,

(b) (5)

[Redacted content]

[REDACTED]

[REDACTED]

[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED].

Thanks in advance for your cooperation.

Steve

Stephen Kong
Acting COO & Senior Advisor for Policy and Planning
Office of the Administrator
U.S. Small Business Administration
Office: (202) 205-6100
Cell: (202) 710-5141
stephen.kong@sba.gov



From: Kong, Stephen D.

Sent: Tuesday, November 10, 2020 5:47 PM

To: Mutz, Martina A. <Martina.Mutz@sba.gov>; Rowen, Dolores F. <dolores.rowen@sba.gov>; Contreras, Alejandro C. <alejandro.contreras@sba.gov>; Sutch, Zina B. <Zina.Sutch@sba.gov>; Walker, Gaye T. <Gaye.Walker@sba.gov>; Crean, Sean F. <Sean.Crean@sba.gov>; Taylor, Sharon A. <sharon.taylor@sba.gov>; Brill, Julie <Julie.Brill@sba.gov>; Biaggi-Ayer, Denise A. <Denise.Biaggi-Ayer@sba.gov>; Wales, Mina A. <Mina.Wales@sba.gov>; Green, Timothy A. <Timothy.Green@sba.gov>; Clark III, Major L. <Major.Clark@sba.gov>; Vallante, Michael A. <Michael.Vallante@sba.gov>; Weaver, Christopher L. <Christopher.Weaver2@sba.gov>; Biles, Brittany W <Brittany.Biles@sba.gov>; Greene, Loretta S. <Loretta.Greene@sba.gov>; Gibson, Patricia M <Patricia.Gibson@sba.gov>; Yousefi, Mandana <mandana.yousefi@sba.gov>; Miller, John A. <John.Miller@sba.gov>; Lisaius, Jennifer F. <Jennifer.Lisaius@sba.gov>; Coffield, Andrew J. <Andrew.Coffield@sba.gov>; Rubio Ritter, Ilene P. <Ilene.Rubio@sba.gov>; Bossie, Jason <Jason.Bossie@sba.gov>; Nicholson, James R. <James.Nicholson@sba.gov>; Bennett, Patty A. (Temp) <Patty.Bennett@sba.gov>; West, Jacqueline B. <Jacqueline.West@sba.gov>; Cheeks,

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Subject: Brief Transition Update ***PLEASE DO NOT FORWARD--FOR TRANSITION POCs ONLY***

Everyone,

(b) (5)

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Again, I will keep you posted on any developments, and thanks for your support.

Steve

Stephen Kong
Acting COO & Senior Advisor for Policy and Planning
Office of the Administrator

U.S. Small Business Administration

Office: (202) 205-6100

Cell: [REDACTED]

stephen.kong@sba.gov



From: [Kurtenbach, Daniel J.](#)
To: [Hernandez, Elias](#)
Subject: RE: Brief Transition Update ***PLEASE DO NOT FORWARD--FOR TRANSITION POCs ONLY***
Date: Friday, November 27, 2020 11:17:00 AM
Attachments: [image001.png](#)

Good morning, Elias. The first meeting you're taking part in with the ART will be Tuesday at 3:30pm. Each program office is meeting separately, and we haven't received a specific request from ART for a meeting with OHRS. I presume they'll want to set something up after the initial group of calls.

Thanks,
Dan

From: Hernandez, Elias <elias.hernandez@sba.gov>
Sent: Friday, November 27, 2020 10:03 AM
To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Subject: RE: Brief Transition Update ***PLEASE DO NOT FORWARD--FOR TRANSITION POCs ONLY***

Good Morning Dan,

I hope you had a wonderful Thanksgiving. When is the initial meeting with the ART team?

Elias

From: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Sent: Friday, November 27, 2020 10:41 AM
To: Kong, Stephen D. <Stephen.Kong@sba.gov>; Mutz, Martina A. <Martina.Mutz@sba.gov>; Rowen, Dolores F. <dolores.rowen@sba.gov>; Contreras, Alejandro C. <alejandro.contreras@sba.gov>; Sutch, Zina B. <Zina.Sutch@sba.gov>; Walker, Gaye T. <Gaye.Walker@sba.gov>; Crean, Sean F. <Sean.Crean@sba.gov>; Taylor, Sharon A. <sharon.taylor@sba.gov>; Brill, Julie <Julie.Brill@sba.gov>; Biaggi-Ayer, Denise A. <Denise.Biaggi-Ayer@sba.gov>; Wales, Mina A. <Mina.Wales@sba.gov>; Green, Timothy A. <Timothy.Green@sba.gov>; Clark III, Major L. <Major.Clark@sba.gov>; Vallante, Michael A. <Michael.Vallante@sba.gov>; Weaver, Christopher L. <Christopher.Weaver2@sba.gov>; Biles, Brittany W <Brittany.Biles@sba.gov>; Greene, Loretta S. <Loretta.Greene@sba.gov>; Gibson, Patricia M <Patricia.Gibson@sba.gov>; Yousefi, Mandana <mandana.yousefi@sba.gov>; Miller, John A. <John.Miller@sba.gov>; Lisaius, Jennifer F. <Jennifer.Lisaius@sba.gov>; Coffield, Andrew J. <Andrew.Coffield@sba.gov>; Rubio Ritter, Ilene P. <Ilene.Rubio@sba.gov>; Bossie, Jason <Jason.Bossie@sba.gov>; Nicholson, James R. <James.Nicholson@sba.gov>; Bennett, Patty A. (Temp) <Patty.Bennett@sba.gov>; West, Jacqueline B. <Jacqueline.West@sba.gov>; Cheeks, Raymond A. <Raymond.Cheeks@sba.gov>; Dickens, Valencia D. <Valencia.Dickens@sba.gov>; DeFosset III, Donald <Donald.DeFossetIII@sba.gov>; Morris, Thomas G. <thomas.morris@sba.gov>; Fishman, David A. <david.fishman@sba.gov>; Hunter, Karen L. <Karen.Hunter@sba.gov>; Cantlon, James D. <James.Cantlon@sba.gov>; Westbrook, Jonathon (Temp)

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Hi everyone,

(b) (5)
[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

Steve

Stephen Kong
Acting COO & Senior Advisor for Policy and Planning
Office of the Administrator

U.S. Small Business Administration

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Cell: (202) 710-5141

stephen.kong@sba.gov



From: Kong, Stephen D.

Sent: Tuesday, November 10, 2020 5:47 PM

To: Mutz, Martina A. <Martina.Mutz@sba.gov>; Rowen, Dolores F. <dolores.rowen@sba.gov>; Contreras, Alejandro C. <alejandro.contreras@sba.gov>; Sutch, Zina B. <Zina.Sutch@sba.gov>; Walker, Gaye T. <Gaye.Walker@sba.gov>; Crean, Sean F. <Sean.Crean@sba.gov>; Taylor, Sharon A. <sharon.taylor@sba.gov>; Brill, Julie <Julie.Brill@sba.gov>; Biaggi-Ayer, Denise A. <Denise.Biaggi-Ayer@sba.gov>; Wales, Mina A. <Mina.Wales@sba.gov>; Green, Timothy A. <Timothy.Green@sba.gov>; Clark III, Major L. <Major.Clark@sba.gov>; Vallante, Michael A. <Michael.Vallante@sba.gov>; Weaver, Christopher L. <Christopher.Weaver2@sba.gov>; Biles, Brittany W <Brittany.Biles@sba.gov>; Greene, Loretta S. <Loretta.Greene@sba.gov>; Gibson, Patricia M <Patricia.Gibson@sba.gov>; Yousefi, Mandana <mandana.yousefi@sba.gov>; Miller, John A. <John.Miller@sba.gov>; Lisaius, Jennifer F. <Jennifer.Lisaius@sba.gov>; Coffield, Andrew J. <Andrew.Coffield@sba.gov>; Rubio Ritter, Ilene P. <Ilene.Rubio@sba.gov>; Bossie, Jason <Jason.Bossie@sba.gov>; Nicholson, James R. <James.Nicholson@sba.gov>; Bennett, Patty A. (Temp) <Patty.Bennett@sba.gov>; West, Jacqueline B. <Jacqueline.West@sba.gov>; Cheeks, Raymond A. <Raymond.Cheeks@sba.gov>; Dickens, Valencia D. <Valencia.Dickens@sba.gov>; DeFosset III, Donald <Donald.DeFossetIII@sba.gov>; Morris, Thomas G. <thomas.morris@sba.gov>; Fishman, David A. <david.fishman@sba.gov>; Hunter, Karen L. <Karen.Hunter@sba.gov>; Cantlon, James D. <James.Cantlon@sba.gov>; Westbrook, Jonathon (Temp) <Jonathon.Westbrook@sba.gov>; Hernandez, Elias <elias.hernandez@sba.gov>; Gray, Christopher S. <Christopher.Gray@sba.gov>; Hershey, Michael S <Michael.Hershey@sba.gov>; Nelson, Nicole M. <Nicole.Nelson@sba.gov>; Perriello, Tami L. <Tami.Perriello@sba.gov>; 'Manger, William M.' <William.Manger@sba.gov>; Kupfer, Jeffrey F. <Jeffrey.Kupfer@sba.gov>; Ford, Delorice Price <delorice.ford@sba.gov>; Bluestein, Keith A. <Keith.Bluestein@sba.gov>; Monchek, Rafaela <Rafaela.Monchek@sba.gov>; Spampinato, Francis C. <Francis.Spampinato@sba.gov>; Rivera, James E. <james.rivera@sba.gov>; Gutierrez, Allen M <Allen.Gutierrez@sba.gov>; Richards, Amber G. <Amber.Richards@sba.gov>

Cc: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>; Carson, Barbara E. <barbara.carson@sba.gov>; Stubblefield, Larry <Larry.Stubblefield@sba.gov>; Billimoria, Jim

(jim.billimoria@sba.gov) <jim.billimoria@sba.gov>; Erin S. McCracken <Erin.McCracken@sba.gov>;
Wilkerson, Carol R. <carol.wilkerson@sba.gov>

Subject: Brief Transition Update ***PLEASE DO NOT FORWARD--FOR TRANSITION POCs ONLY***

Everyone,

(b) (5) [REDACTED]
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[REDACTED]
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[REDACTED]

[REDACTED]

Steve

Stephen Kong
Acting COO & Senior Advisor for Policy and Planning
Office of the Administrator

U.S. Small Business Administration

Office: (202) 205-6100

Cell: [REDACTED]

stephen.kong@sba.gov



From: [Kurtenbach, Daniel J.](#)
To: [Kong, Stephen D.](#); [Mutz, Martina A.](#); [Rowen, Dolores F.](#); [Contreras, Alejandro C.](#); [Sutch, Zina B.](#); [Walker, Gaye T.](#); [Crean, Sean F.](#); [Taylor, Sharon A.](#); [Brill, Julie](#); [Biaggi-Ayer, Denise A.](#); [Wales, Mina A.](#); [Green, Timothy A.](#); [Clark III, Major L.](#); [Vallante, Michael A.](#); [Weaver, Christopher L.](#); [Biles, Brittany W.](#); [Greene, Loretta S.](#); [Gibson, Patricia M.](#); [Yousefi, Mandana](#); [Miller, John A.](#); [Lisaius, Jennifer F.](#); [Coffield, Andrew J.](#); [Rubio Ritter, Ilene P.](#); [Bossie, Jason](#); [Nicholson, James R.](#); [Bennett, Patty A. \(Temp\)](#); [West, Jacqueline B.](#); [Cheeks, Raymond A.](#); [Dickens, Valencia D.](#); [DeFosset III, Donald](#); [Morris, Thomas G.](#); [Fishman, David A.](#); [Hunter, Karen L.](#); [Cantlon, James D.](#); [Westbrook, Jonathon \(Temp\)](#); [Hernandez, Elias](#); [Gray, Christopher S.](#); [Hershey, Michael S.](#); [Nelson, Nicole M.](#); [Perriello, Tami L.](#); [Manger, William M.](#); [Kupfer, Jeffrey F.](#); [Ford, Delorice Price](#); [Bluestein, Keith A.](#); [Monchek, Rafaela](#); [Spampinato, Francis C.](#); [Rivera, James E.](#); [Gutierrez, Allen M.](#); [Richards, Amber G.](#)
Cc: [Carson, Barbara E.](#); [Stubblefield, Larry](#); [Billimoria, Jimmy F. \(Jim\)](#); [McCracken, Erin S.](#); [Wilkerson, Carol R.](#)
Subject: RE: Brief Transition Update ***PLEASE DO NOT FORWARD--FOR TRANSITION POCs ONLY***
Date: Friday, November 27, 2020 10:41:00 AM
Attachments: [image001.png](#)
[Table of Contents.pdf](#)

Good morning,

I had a couple requests for the final versions of each program office's sections for the briefing book. Rather than send individually (although I certainly can if you reach out directly), I'm sending the link for every PDF that went into the 2020 transition briefing book:



If there are questions about where your sections fit, please refer to the attached Table of Contents.

Thanks, and please reach out with questions.

Best,
Dan

Daniel J. Kurtenbach
White House Fellow
U.S. Small Business Administration
(515) 231-5805

From: Kong, Stephen D. <Stephen.Kong@sba.gov>
Sent: Tuesday, November 24, 2020 8:11 AM
To: [Mutz, Martina A. <Martina.Mutz@sba.gov>](#); [Rowen, Dolores F. <dolores.rowen@sba.gov>](#); [Contreras, Alejandro C. <alejandro.contreras@sba.gov>](#); [Sutch, Zina B. <Zina.Sutch@sba.gov>](#); [Walker, Gaye T. <Gaye.Walker@sba.gov>](#); [Crean, Sean F. <Sean.Crean@sba.gov>](#); [Taylor, Sharon A. <sharon.taylor@sba.gov>](#); [Brill, Julie <Julie.Brill@sba.gov>](#); [Biaggi-Ayer, Denise A. <Denise.Biaggi-Ayer@sba.gov>](#); [Wales, Mina A. <Mina.Wales@sba.gov>](#); [Green, Timothy A. <Timothy.Green@sba.gov>](#); [Clark III, Major L. <Major.Clark@sba.gov>](#); [Vallante, Michael A. <Michael.Vallante@sba.gov>](#); [Weaver, Christopher L. <Christopher.Weaver2@sba.gov>](#); [Biles, Brittany W. <Brittany.Biles@sba.gov>](#); [Greene, Loretta S. <Loretta.Greene@sba.gov>](#); [Gibson, Patricia M. <Patricia.Gibson@sba.gov>](#); [Yousefi, Mandana <mandana.yousefi@sba.gov>](#); [Miller, John A. <John.Miller@sba.gov>](#); [Lisaius, Jennifer F. <Jennifer.Lisaius@sba.gov>](#); [Coffield, Andrew J. <Andrew.Coffield@sba.gov>](#); [Rubio Ritter, Ilene P. <Ilene.Rubio@sba.gov>](#); [Bossie, Jason <Jason.Bossie@sba.gov>](#); [Nicholson, James R. <James.Nicholson@sba.gov>](#); [Bennett, Patty A. \(Temp\) <Patty.Bennett@sba.gov>](#); [West, Jacqueline B. <Jacqueline.West@sba.gov>](#); [Cheeks, Raymond A. <Raymond.Cheeks@sba.gov>](#); [Dickens, Valencia D. <Valencia.Dickens@sba.gov>](#);

DeFosset III, Donald <Donald.DeFossetIII@sba.gov>; Morris, Thomas G. <thomas.morris@sba.gov>; Fishman, David A. <david.fishman@sba.gov>; Hunter, Karen L. <Karen.Hunter@sba.gov>; Cantlon, James D. <James.Cantlon@sba.gov>; Westbrook, Jonathon (Temp) <Jonathon.Westbrook@sba.gov>; Hernandez, Elias <elias.hernandez@sba.gov>; Gray, Christopher S. <Christopher.Gray@sba.gov>; Hershey, Michael S <Michael.Hershey@sba.gov>; Nelson, Nicole M. <Nicole.Nelson@sba.gov>; Perriello, Tami L. <Tami.Perriello@sba.gov>; Manger, William M. <William.Manger@sba.gov>; Kupfer, Jeffrey F. <Jeffrey.Kupfer@sba.gov>; Ford, Delorice Price <delorice.ford@sba.gov>; Bluestein, Keith A. <Keith.Bluestein@sba.gov>; Monchek, Rafaela <Rafaela.Monchek@sba.gov>; Spampinato, Francis C. <Francis.Spampinato@sba.gov>; Rivera, James E. <james.rivera@sba.gov>; Gutierrez, Allen M <Allen.Gutierrez@sba.gov>; Richards, Amber G. <Amber.Richards@sba.gov>

Cc: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>; Carson, Barbara E. <barbara.carson@sba.gov>; Stubblefield, Larry <Larry.Stubblefield@sba.gov>; Billimoria, Jimmy F. (Jim) <jim.billimoria@sba.gov>; McCracken, Erin S. <Erin.McCracken@sba.gov>; Wilkerson, Carol R. <carol.wilkerson@sba.gov>

Subject: RE: Brief Transition Update ***PLEASE DO NOT FORWARD--FOR TRANSITION POCs ONLY***

PLEASE DO NOT FORWARD

Hi everyone,

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[Redacted].

Steve

Stephen Kong
Acting COO & Senior Advisor for Policy and Planning

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stephen.kong@sba.gov



From: Kong, Stephen D.

Sent: Tuesday, November 10, 2020 5:47 PM

To: Mutz, Martina A. <Martina.Mutz@sba.gov>; Rowen, Dolores F. <dolores.rowen@sba.gov>; Contreras, Alejandro C. <alejandro.contreras@sba.gov>; Sutch, Zina B. <Zina.Sutch@sba.gov>; Walker, Gaye T. <Gaye.Walker@sba.gov>; Crean, Sean F. <Sean.Crean@sba.gov>; Taylor, Sharon A. <sharon.taylor@sba.gov>; Brill, Julie <Julie.Brill@sba.gov>; Biaggi-Ayer, Denise A. <Denise.Biaggi-Ayer@sba.gov>; Wales, Mina A. <Mina.Wales@sba.gov>; Green, Timothy A. <Timothy.Green@sba.gov>; Clark III, Major L. <Major.Clark@sba.gov>; Vallante, Michael A. <Michael.Vallante@sba.gov>; Weaver, Christopher L. <Christopher.Weaver2@sba.gov>; Biles, Brittany W <Brittany.Biles@sba.gov>; Greene, Loretta S. <Loretta.Greene@sba.gov>; Gibson, Patricia M <Patricia.Gibson@sba.gov>; Yousefi, Mandana <mandana.yousefi@sba.gov>; Miller, John A. <John.Miller@sba.gov>; Lisaius, Jennifer F. <Jennifer.Lisaius@sba.gov>; Coffield, Andrew J. <Andrew.Coffield@sba.gov>; Rubio Ritter, Ilene P. <Ilene.Rubio@sba.gov>; Bossie, Jason <Jason.Bossie@sba.gov>; Nicholson, James R. <James.Nicholson@sba.gov>; Bennett, Patty A. (Temp) <Patty.Bennett@sba.gov>; West, Jacqueline B. <Jacqueline.West@sba.gov>; Cheeks, Raymond A. <Raymond.Cheeks@sba.gov>; Dickens, Valencia D. <Valencia.Dickens@sba.gov>; DeFosset III, Donald <Donald.DeFossetIII@sba.gov>; Morris, Thomas G. <thomas.morris@sba.gov>; Fishman, David A. <david.fishman@sba.gov>; Hunter, Karen L. <Karen.Hunter@sba.gov>; Cantlon, James D. <James.Cantlon@sba.gov>; Westbrook, Jonathon (Temp) <Jonathon.Westbrook@sba.gov>; Hernandez, Elias <elias.hernandez@sba.gov>; Gray, Christopher S. <Christopher.Gray@sba.gov>; Hershey, Michael S <Michael.Hershey@sba.gov>; Nelson, Nicole M. <Nicole.Nelson@sba.gov>; Perriello, Tami L. <Tami.Perriello@sba.gov>; 'Manger, William M.' <William.Manger@sba.gov>; Kupfer, Jeffrey F. <Jeffrey.Kupfer@sba.gov>; Ford, Delorice Price <delorice.ford@sba.gov>; Bluestein, Keith A. <Keith.Bluestein@sba.gov>; Monchek, Rafaela <Rafaela.Monchek@sba.gov>; Spampinato, Francis C. <Francis.Spampinato@sba.gov>; Rivera, James E. <james.rivera@sba.gov>; Gutierrez, Allen M <Allen.Gutierrez@sba.gov>; Richards, Amber G. <Amber.Richards@sba.gov>

Cc: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>; Carson, Barbara E. <barbara.carson@sba.gov>; Stubblefield, Larry <Larry.Stubblefield@sba.gov>; Billimoria, Jim (<jim.billimoria@sba.gov> <jim.billimoria@sba.gov>); Erin S. McCracken <Erin.McCracken@sba.gov>; Wilkerson, Carol R. <carol.wilkerson@sba.gov>

Subject: Brief Transition Update ***PLEASE DO NOT FORWARD--FOR TRANSITION POCs ONLY***

Everyone,

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[REDACTED]

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[REDACTED]

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[REDACTED]

Steve

Stephen Kong
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Office of the Administrator

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stephen.kong@sba.gov



From: [Kurtenbach, Daniel J.](#)
To: [Kong, Stephen D.](#); [Hernandez, Elias](#)
Cc: [Brill, Julie](#); [Biaggi-Ayer, Denise A.](#)
Subject: Re: Brief Transition Update ***PLEASE DO NOT FORWARD--FOR TRANSITION POCs ONLY***
Date: Monday, November 30, 2020 12:29:08 PM
Attachments: [image001.png](#)
[image002.png](#)

There is no request for an OHRS-specific presentation at this point.

Dan

From: Kong, Stephen D. <Stephen.Kong@sba.gov>
Date: Monday, November 30, 2020 at 12:26 PM
To: Hernandez, Elias <elias.hernandez@sba.gov>, Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Cc: Brill, Julie <Julie.Brill@sba.gov>, Biaggi-Ayer, Denise A. <Denise.Biaggi-Ayer@sba.gov>
Subject: RE: Brief Transition Update ***PLEASE DO NOT FORWARD--FOR TRANSITION POCs ONLY***

We may try to move yours. T (b) (5)

From: Hernandez, Elias <elias.hernandez@sba.gov>
Sent: Monday, November 30, 2020 12:24 PM
To: Kong, Stephen D. <Stephen.Kong@sba.gov>; Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Cc: Brill, Julie <Julie.Brill@sba.gov>; Biaggi-Ayer, Denise A. <Denise.Biaggi-Ayer@sba.gov>
Subject: RE: Brief Transition Update ***PLEASE DO NOT FORWARD--FOR TRANSITION POCs ONLY***

Good Afternoon Steve and Dan,

Julie, Denise and Elias for OHRS will attend for OHRS.

Dan the only meeting on my calendar related to the ART this week is tomorrow at 3pm with you, Steve, Tami, and Keith. Is this the meeting where I need to brief the OHRS slides? Please advise.

Elias

From: Kong, Stephen D. <Stephen.Kong@sba.gov>
Sent: Monday, November 30, 2020 12:04 PM
To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>; Mutz, Martina A. <Martina.Mutz@sba.gov>; Rowen, Dolores F. <dolores.rowen@sba.gov>; Contreras, Alejandro C. <alejandro.contreras@sba.gov>; Sutch, Zina B. <Zina.Sutch@sba.gov>; Walker, Gaye T. <Gaye.Walker@sba.gov>; Crean, Sean F. <Sean.Crean@sba.gov>; Taylor, Sharon A. <sharon.taylor@sba.gov>; Brill, Julie <Julie.Brill@sba.gov>; Biaggi-Ayer, Denise A. <Denise.Biaggi-Ayer@sba.gov>; Wales, Mina A. <Mina.Wales@sba.gov>; Green, Timothy A.

<Timothy.Green@sba.gov>; Clark III, Major L. <Major.Clark@sba.gov>; Vallante, Michael A. <Michael.Vallante@sba.gov>; Weaver, Christopher L. <Christopher.Weaver2@sba.gov>; Biles, Brittany W <Brittany.Biles@sba.gov>; Greene, Loretta S. <Loretta.Greene@sba.gov>; Gibson, Patricia M <Patricia.Gibson@sba.gov>; Yousefi, Mandana <mandana.yousefi@sba.gov>; Miller, John A. <John.Miller@sba.gov>; Lisaius, Jennifer F. <Jennifer.Lisaius@sba.gov>; Coffield, Andrew J. <Andrew.Coffield@sba.gov>; Rubio Ritter, Ilene P. <Ilene.Rubio@sba.gov>; Bossie, Jason <Jason.Bossie@sba.gov>; Nicholson, James R. <James.Nicholson@sba.gov>; Bennett, Patty A. (Temp) <Patty.Bennett@sba.gov>; West, Jacqueline B. <Jacqueline.West@sba.gov>; Cheeks, Raymond A. <Raymond.Cheeks@sba.gov>; Dickens, Valencia D. <Valencia.Dickens@sba.gov>; DeFosset III, Donald <Donald.DeFossetIII@sba.gov>; Morris, Thomas G. <thomas.morris@sba.gov>; Fishman, David A. <david.fishman@sba.gov>; Hunter, Karen L. <Karen.Hunter@sba.gov>; Cantlon, James D. <James.Cantlon@sba.gov>; Westbrook, Jonathon (Temp) <Jonathon.Westbrook@sba.gov>; Hernandez, Elias <elias.hernandez@sba.gov>; Gray, Christopher S. <Christopher.Gray@sba.gov>; Hershey, Michael S <Michael.Hershey@sba.gov>; Nelson, Nicole M. <Nicole.Nelson@sba.gov>; Perriello, Tami L. <Tami.Perriello@sba.gov>; Manger, William M. <William.Manger@sba.gov>; Kupfer, Jeffrey F. <Jeffrey.Kupfer@sba.gov>; Ford, Delorice Price <delorice.ford@sba.gov>; Bluestein, Keith A. <Keith.Bluestein@sba.gov>; Monchek, Rafaela <Rafaela.Monchek@sba.gov>; Spampinato, Francis C. <Francis.Spampinato@sba.gov>; Rivera, James E. <james.rivera@sba.gov>; Gutierrez, Allen M <Allen.Gutierrez@sba.gov>; Richards, Amber G. <Amber.Richards@sba.gov>
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Subject: RE: Brief Transition Update ***PLEASE DO NOT FORWARD--FOR TRANSITION POCs ONLY***

Everyone, for the briefings this week, if possible can you send me and Dan who will be attending for your office? Thanks!

From: Kong, Stephen D.

Sent: Sunday, November 29, 2020 7:22 PM

To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>; Mutz, Martina A. <Martina.Mutz@sba.gov>; Rowen, Dolores F. <dolores.rowen@sba.gov>; Contreras, Alejandro C. <alejandro.contreras@sba.gov>; Sutch, Zina B. <Zina.Sutch@sba.gov>; Walker, Gaye T. <Gaye.Walker@sba.gov>; Crean, Sean F. <Sean.Crean@sba.gov>; Taylor, Sharon A. <sharon.taylor@sba.gov>; Brill, Julie <Julie.Brill@sba.gov>; Biaggi-Ayer, Denise A. <Denise.Biaggi-Ayer@sba.gov>; Wales, Mina A. <Mina.Wales@sba.gov>; Green, Timothy A. <Timothy.Green@sba.gov>; Clark III, Major L. <Major.Clark@sba.gov>; Vallante, Michael A. <Michael.Vallante@sba.gov>; Weaver, Christopher L. <Christopher.Weaver2@sba.gov>; Biles, Brittany W <Brittany.Biles@sba.gov>; Greene, Loretta S. <Loretta.Greene@sba.gov>; Gibson, Patricia M <Patricia.Gibson@sba.gov>; Yousefi, Mandana <mandana.yousefi@sba.gov>; Miller, John A. <John.Miller@sba.gov>; Lisaius, Jennifer F. <Jennifer.Lisaius@sba.gov>; Coffield, Andrew J. <Andrew.Coffield@sba.gov>; Rubio Ritter, Ilene P. <Ilene.Rubio@sba.gov>; Bossie, Jason <Jason.Bossie@sba.gov>; Nicholson, James R. <James.Nicholson@sba.gov>; Bennett, Patty A. (Temp) <Patty.Bennett@sba.gov>; West, Jacqueline B. <Jacqueline.West@sba.gov>; Cheeks, Raymond A. <Raymond.Cheeks@sba.gov>; Dickens, Valencia D. <Valencia.Dickens@sba.gov>; DeFosset III, Donald <Donald.DeFossetIII@sba.gov>; Morris, Thomas G. <thomas.morris@sba.gov>; Fishman, David A. <david.fishman@sba.gov>; Hunter, Karen L. <Karen.Hunter@sba.gov>; Cantlon, James D.

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Subject: RE: Brief Transition Update ***PLEASE DO NOT FORWARD--FOR TRANSITION POCs ONLY***

All—

Please see the attached “Rules for the Road” for engagement with the SBA ART. For internal SBA use and dissemination only. Hope they are helpful.

Steve

From: Kong, Stephen D.

Sent: Friday, November 27, 2020 2:19 PM

To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>; Mutz, Martina A. <Martina.Mutz@sba.gov>; Rowen, Dolores F. <dolores.rowen@sba.gov>; Contreras, Alejandro C. <alejandro.contreras@sba.gov>; Sutch, Zina B. <Zina.Sutch@sba.gov>; Walker, Gaye T. <Gaye.Walker@sba.gov>; Crean, Sean F. <Sean.Crean@sba.gov>; Taylor, Sharon A. <sharon.taylor@sba.gov>; Brill, Julie <Julie.Brill@sba.gov>; Biaggi-Ayer, Denise A. <Denise.Biaggi-Ayer@sba.gov>; Wales, Mina A. <Mina.Wales@sba.gov>; Green, Timothy A. <Timothy.Green@sba.gov>; Clark III, Major L. <Major.Clark@sba.gov>; Vallante, Michael A. <Michael.Vallante@sba.gov>; Weaver, Christopher L. <Christopher.Weaver2@sba.gov>; Biles, Brittany W <Brittany.Biles@sba.gov>; Greene, Loretta S. <Loretta.Greene@sba.gov>; Gibson, Patricia M <Patricia.Gibson@sba.gov>; Yousefi, Mandana <mandana.yousefi@sba.gov>; Miller, John A. <John.Miller@sba.gov>; Lisaius, Jennifer F. <Jennifer.Lisaius@sba.gov>; Coffield, Andrew J. <Andrew.Coffield@sba.gov>; Rubio Ritter, Ilene P. <Ilene.Rubio@sba.gov>; Bossie, Jason <Jason.Bossie@sba.gov>; Nicholson, James R. <James.Nicholson@sba.gov>; Bennett, Patty A. (Temp) <Patty.Bennett@sba.gov>; West, Jacqueline B. <Jacqueline.West@sba.gov>; Cheeks, Raymond A. <Raymond.Cheeks@sba.gov>; Dickens, Valencia D. <Valencia.Dickens@sba.gov>; DeFosset III, Donald <Donald.DeFossetIII@sba.gov>; Morris, Thomas G. <thomas.morris@sba.gov>; Fishman, David A. <david.fishman@sba.gov>; Hunter, Karen L. <Karen.Hunter@sba.gov>; Cantlon, James D. <James.Cantlon@sba.gov>; Westbrook, Jonathon (Temp) <Jonathon.Westbrook@sba.gov>; Hernandez, Elias <elias.hernandez@sba.gov>; Gray, Christopher S. <Christopher.Gray@sba.gov>; Hershey, Michael S <Michael.Hershey@sba.gov>; Nelson, Nicole M. <Nicole.Nelson@sba.gov>; Perriello, Tami L. <Tami.Perriello@sba.gov>; Manger, William M. <William.Manger@sba.gov>; Kupfer, Jeffrey F. <Jeffrey.Kupfer@sba.gov>; Ford, Delorice Price <delorice.ford@sba.gov>; Bluestein, Keith A. <Keith.Bluestein@sba.gov>; Monchek, Rafaela <Rafaela.Monchek@sba.gov>; Spampinato, Francis C.

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Wilkerson, Carol R. <carol.wilkerson@sba.gov>

Subject: RE: Brief Transition Update ***PLEASE DO NOT FORWARD--FOR TRANSITION POCs ONLY***

Everyone,

Hope you had a great Thanksgiving. Thanks again for your cooperation and flexibility as the briefings with the ART team will begin on Monday. We will let you know if there are any changes in day/time. I will send around some very brief rules for the road this weekend. ***Note that all of the briefings will be conducted virtually.***

Below is an updated list of the SBA ART team members, as of this morning (Red means a new member; FYI—"non-ATDC" means those agencies [most of them] that do not sit on the formal Transition Council)

Agency Name	Type	Member Name	Email	Security Clearance	Team Lead?
Small Business Administration (SBA)	Non-ATDC	Arthur Plews			
Small Business Administration (SBA)	Non-ATDC	Bibi Hidalgo			
Small Business Administration (SBA)	Non-ATDC	Cassius F. Butts			
Small Business Administration (SBA)	Non-ATDC	Chris James			
Small Business Administration (SBA)	Non-ATDC	Christopher Upperman			
Small Business Administration (SBA)	Non-ATDC	Clifton Kellogg			
Small Business Administration (SBA)	Non-ATDC	Ellen Kim			
Small Business Administration (SBA)	Non-ATDC	Isabel Guzman			
Small Business Administration (SBA)	Non-ATDC	Isabelle James			
Small Business Administration (SBA)	Non-ATDC	Jeff Zuttah			
Small Business Administration (SBA)	Non-ATDC	Jonathan Swain	jswain@ptt.gov		Yes
Small Business Administration (SBA)	Non-ATDC	Jorge Silva-Puras			
Small Business Administration (SBA)	Non-ATDC	Liyan David Chang			
Small Business Administration (SBA)	Non-ATDC	Meredith Shaffer			
Small Business Administration (SBA)	Non-ATDC	Michael Chodos			
Small Business Administration (SBA)	Non-ATDC	Michael Roth			
Small Business Administration (SBA)	Non-ATDC	Michele Chang			
Small Business Administration (SBA)	Non-ATDC	Xavier Briggs			

Also, below are the ART leads for each office's briefing—there may be other Art team members that are present for the meeting, but most of the questions will be coming from the leads—

COVID-19—Chris James, Jonathan Swain

OCA—Cliff Kellogg, Michael Roth

ODA—Chris James, Meredith Shaffer

Agency Operations and Personnel (OHRS, COO, CIO, CFO)—Ellen Kim, Michele Chang

OED (incl. SBDC, OWBO, SCORE)—Isabel Guzman, Cassius Butts

GCBD—Bibi Hidalgo, Michele Chang

OII—Meredith Shaffer, Isabel Guzman
OFO—Jorge Silva Puras, Cassius Butts
OGC—Michael Chodos, Meredith Shaffer
OVBD—Michael Chodos
ONAA—Chris James
OIT—Arthur Plews
Advocacy—Michael Chodos
ONO—Jonathan Swain

From: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>

Sent: Friday, November 27, 2020 10:41 AM

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If there are questions about where your sections fit, please refer to the attached Table of Contents.

Thanks, and please reach out with questions.

Best,
Dan

Daniel J. Kurtenbach
White House Fellow
U.S. Small Business Administration
(515) 231-5805

From: Kong, Stephen D. <Stephen.Kong@sba.gov>

Sent: Tuesday, November 24, 2020 8:11 AM

To: Mutz, Martina A. <Martina.Mutz@sba.gov>; Rowen, Dolores F. <dolores.rowen@sba.gov>; Contreras, Alejandro C. <alejandro.contreras@sba.gov>; Sutch, Zina B. <Zina.Sutch@sba.gov>; Walker, Gaye T. <Gaye.Walker@sba.gov>; Crean, Sean F. <Sean.Crean@sba.gov>; Taylor, Sharon A. <sharon.taylor@sba.gov>; Brill, Julie <Julie.Brill@sba.gov>; Biaggi-Ayer, Denise A. <Denise.Biaggi-Ayer@sba.gov>; Wales, Mina A. <Mina.Wales@sba.gov>; Green, Timothy A. <Timothy.Green@sba.gov>; Clark III, Major L. <Major.Clark@sba.gov>; Vallante, Michael A. <Michael.Vallante@sba.gov>; Weaver, Christopher L. <Christopher.Weaver2@sba.gov>; Biles, Brittany W <Brittany.Biles@sba.gov>; Greene, Loretta S. <Loretta.Greene@sba.gov>; Gibson, Patricia M <Patricia.Gibson@sba.gov>; Yousefi, Mandana <mandana.yousefi@sba.gov>; Miller, John A. <John.Miller@sba.gov>; Lisaius, Jennifer F. <Jennifer.Lisaius@sba.gov>; Coffield, Andrew J. <Andrew.Coffield@sba.gov>; Rubio Ritter, Ilene P. <Ilene.Rubio@sba.gov>; Bossie, Jason <Jason.Bossie@sba.gov>; Nicholson, James R. <James.Nicholson@sba.gov>; Bennett, Patty A. (Temp) <Patty.Bennett@sba.gov>; West, Jacqueline B. <Jacqueline.West@sba.gov>; Cheeks, Raymond A. <Raymond.Cheeks@sba.gov>; Dickens, Valencia D. <Valencia.Dickens@sba.gov>; DeFosset III, Donald <Donald.DeFossetIII@sba.gov>; Morris, Thomas G. <thomas.morris@sba.gov>; Fishman, David A. <david.fishman@sba.gov>; Hunter, Karen L. <Karen.Hunter@sba.gov>; Cantlon, James D. <James.Cantlon@sba.gov>; Westbrook, Jonathon (Temp) <Jonathon.Westbrook@sba.gov>; Hernandez, Elias <elias.hernandez@sba.gov>; Gray, Christopher S. <Christopher.Gray@sba.gov>; Hershey, Michael S <Michael.Hershey@sba.gov>; Nelson, Nicole M. <Nicole.Nelson@sba.gov>; Perriello, Tami L. <Tami.Perriello@sba.gov>; Manger, William M. <William.Manger@sba.gov>; Kupfer, Jeffrey F. <Jeffrey.Kupfer@sba.gov>; Ford, Delorice Price <delorice.ford@sba.gov>; Bluestein, Keith A. <Keith.Bluestein@sba.gov>; Monchek, Rafaela <Rafaela.Monchek@sba.gov>; Spampinato, Francis C. <Francis.Spampinato@sba.gov>; Rivera, James E. <james.rivera@sba.gov>; Gutierrez, Allen M <Allen.Gutierrez@sba.gov>; Richards, Amber G. <Amber.Richards@sba.gov>

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<carol.wilkerson@sba.gov>

Subject: RE: Brief Transition Update ***PLEASE DO NOT FORWARD--FOR TRANSITION POCs ONLY***

PLEASE DO NOT FORWARD

Hi everyone,

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[Redacted]
[Redacted]
[Redacted]
[Redacted]

[Redacted]

Steve

Stephen Kong
Acting COO & Senior Advisor for Policy and Planning
Office of the Administrator

U.S. Small Business Administration

Office: (202) 205-6100

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stephen.kong@sba.gov



From: Kong, Stephen D.

Sent: Tuesday, November 10, 2020 5:47 PM

To: Mutz, Martina A. <Martina.Mutz@sba.gov>; Rowen, Dolores F. <dolores.rowen@sba.gov>;

Contreras, Alejandro C. <alejandro.contreras@sba.gov>; Sutch, Zina B. <Zina.Sutch@sba.gov>; Walker, Gaye T. <Gaye.Walker@sba.gov>; Crean, Sean F. <Sean.Crean@sba.gov>; Taylor, Sharon A. <sharon.taylor@sba.gov>; Brill, Julie <Julie.Brill@sba.gov>; Biaggi-Ayer, Denise A. <Denise.Biaggi-Ayer@sba.gov>; Wales, Mina A. <Mina.Wales@sba.gov>; Green, Timothy A. <Timothy.Green@sba.gov>; Clark III, Major L. <Major.Clark@sba.gov>; Vallante, Michael A. <Michael.Vallante@sba.gov>; Weaver, Christopher L. <Christopher.Weaver2@sba.gov>; Biles, Brittany W <Brittany.Biles@sba.gov>; Greene, Loretta S. <Loretta.Greene@sba.gov>; Gibson, Patricia M <Patricia.Gibson@sba.gov>; Yousefi, Mandana <mandana.yousefi@sba.gov>; Miller, John A. <John.Miller@sba.gov>; Lisaius, Jennifer F. <Jennifer.Lisaius@sba.gov>; Coffield, Andrew J. <Andrew.Coffield@sba.gov>; Rubio Ritter, Ilene P. <Ilene.Rubio@sba.gov>; Bossie, Jason <Jason.Bossie@sba.gov>; Nicholson, James R. <James.Nicholson@sba.gov>; Bennett, Patty A. (Temp) <Patty.Bennett@sba.gov>; West, Jacqueline B. <Jacqueline.West@sba.gov>; Cheeks, Raymond A. <Raymond.Cheeks@sba.gov>; Dickens, Valencia D. <Valencia.Dickens@sba.gov>; DeFosset III, Donald <Donald.DeFossetIII@sba.gov>; Morris, Thomas G. <thomas.morris@sba.gov>; Fishman, David A. <david.fishman@sba.gov>; Hunter, Karen L. <Karen.Hunter@sba.gov>; Cantlon, James D. <James.Cantlon@sba.gov>; Westbrook, Jonathon (Temp) <Jonathon.Westbrook@sba.gov>; Hernandez, Elias <elias.hernandez@sba.gov>; Gray, Christopher S. <Christopher.Gray@sba.gov>; Hershey, Michael S <Michael.Hershey@sba.gov>; Nelson, Nicole M. <Nicole.Nelson@sba.gov>; Perriello, Tami L. <Tami.Perriello@sba.gov>; 'Manger, William M.' <William.Manger@sba.gov>; Kupfer, Jeffrey F. <Jeffrey.Kupfer@sba.gov>; Ford, Delorice Price <delorice.ford@sba.gov>; Bluestein, Keith A. <Keith.Bluestein@sba.gov>; Monchek, Rafaela <Rafaela.Monchek@sba.gov>; Spampinato, Francis C. <Francis.Spampinato@sba.gov>; Rivera, James E. <james.rivera@sba.gov>; Gutierrez, Allen M <Allen.Gutierrez@sba.gov>; Richards, Amber G. <Amber.Richards@sba.gov>
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Everyone,

(b) (5)
[Redacted]

[Redacted]

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(b) (5)

Steve

Stephen Kong
Acting COO & Senior Advisor for Policy and Planning
Office of the Administrator
U.S. Small Business Administration

Office: (202) 205-6100

Cell: ()

stephen.kong@sba.gov



From: [Kurtenbach, Daniel J.](#)
To: [Crean, Sean F.](#)
Cc: [Kong, Stephen D.](#); [Carson, Barbara E.](#)
Subject: RE: Brief Transition Update ***PLEASE DO NOT FORWARD--FOR TRANSITION POCs ONLY***
Date: Friday, November 27, 2020 12:46:00 PM
Attachments: [image002.png](#)

Sean,

(b) (5)
[Redacted]

[Redacted]

Best,
Dan

From: Crean, Sean F. <Sean.Crean@sba.gov>
Sent: Friday, November 27, 2020 11:22 AM
To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Cc: Kong, Stephen D. <Stephen.Kong@sba.gov>; Carson, Barbara E. <barbara.carson@sba.gov>
Subject: RE: Brief Transition Update ***PLEASE DO NOT FORWARD--FOR TRANSITION POCs ONLY***
Importance: High

Dan,

I am reviewing and most of my areas for OEMISS appear complete.

[Redacted]

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[Redacted]

Thank you

Sean

Seán F. Crean
RADM, SC, USN (ret)
Executive Director
Executive Management, Installations & Support Services
U.S. Small Business Administration
Office: 202-205-6340
Sean.crean@sba.gov



From: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Sent: Friday, November 27, 2020 10:41 AM
To: Kong, Stephen D. <Stephen.Kong@sba.gov>; Mutz, Martina A. <Martina.Mutz@sba.gov>;
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<William.Manger@sba.gov>; Kupfer, Jeffrey F. <Jeffrey.Kupfer@sba.gov>; Ford, Delorice Price <delorice.ford@sba.gov>; Bluestein, Keith A. <Keith.Bluestein@sba.gov>; Monchek, Rafaela <Rafaela.Monchek@sba.gov>; Spampinato, Francis C. <Francis.Spampinato@sba.gov>; Rivera, James E. <james.rivera@sba.gov>; Gutierrez, Allen M <Allen.Gutierrez@sba.gov>; Richards, Amber G. <Amber.Richards@sba.gov>

Cc: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>; Carson, Barbara E. <barbara.carson@sba.gov>; Stubblefield, Larry <Larry.Stubblefield@sba.gov>; Billimoria, Jimmy F. (Jim) <jim.billimoria@sba.gov>; McCracken, Erin S. <Erin.McCracken@sba.gov>; Wilkerson, Carol R. <carol.wilkerson@sba.gov>

Subject: RE: Brief Transition Update ***PLEASE DO NOT FORWARD--FOR TRANSITION POCs ONLY***

PLEASE DO NOT FORWARD

Hi everyone,

(b) (5)
[Redacted]
[Redacted]
[Redacted]
[Redacted]

[Redacted]

[Redacted]

[Redacted]
[Redacted]
[Redacted]
[Redacted]
[Redacted]
[Redacted]

[Redacted]

Steve

Stephen Kong
Acting COO & Senior Advisor for Policy and Planning
Office of the Administrator
U.S. Small Business Administration
Office: (202) 205-6100
Cell: [Redacted]
stephen.kong@sba.gov

From: Kong, Stephen D.

Sent: Tuesday, November 10, 2020 5:47 PM

To: Mutz, Martina A. <Martina.Mutz@sba.gov>; Rowen, Dolores F. <dolores.rowen@sba.gov>; Contreras, Alejandro C. <alejandro.contreras@sba.gov>; Sutch, Zina B. <Zina.Sutch@sba.gov>; Walker, Gaye T. <Gaye.Walker@sba.gov>; Crean, Sean F. <Sean.Crean@sba.gov>; Taylor, Sharon A. <sharon.taylor@sba.gov>; Brill, Julie <Julie.Brill@sba.gov>; Biaggi-Ayer, Denise A. <Denise.Biaggi-Ayer@sba.gov>; Wales, Mina A. <Mina.Wales@sba.gov>; Green, Timothy A. <Timothy.Green@sba.gov>; Clark III, Major L. <Major.Clark@sba.gov>; Vallante, Michael A. <Michael.Vallante@sba.gov>; Weaver, Christopher L. <Christopher.Weaver2@sba.gov>; Biles, Brittany W <Brittany.Biles@sba.gov>; Greene, Loretta S. <Loretta.Greene@sba.gov>; Gibson, Patricia M <Patricia.Gibson@sba.gov>; Yousefi, Mandana <mandana.yousefi@sba.gov>; Miller, John A. <John.Miller@sba.gov>; Lisaius, Jennifer F. <Jennifer.Lisaius@sba.gov>; Coffield, Andrew J. <Andrew.Coffield@sba.gov>; Rubio Ritter, Ilene P. <Ilene.Rubio@sba.gov>; Bossie, Jason <Jason.Bossie@sba.gov>; Nicholson, James R. <James.Nicholson@sba.gov>; Bennett, Patty A. (Temp) <Patty.Bennett@sba.gov>; West, Jacqueline B. <Jacqueline.West@sba.gov>; Cheeks, Raymond A. <Raymond.Cheeks@sba.gov>; Dickens, Valencia D. <Valencia.Dickens@sba.gov>; DeFosset III, Donald <Donald.DeFossetIII@sba.gov>; Morris, Thomas G. <thomas.morris@sba.gov>; Fishman, David A. <david.fishman@sba.gov>; Hunter, Karen L. <Karen.Hunter@sba.gov>; Cantlon, James D. <James.Cantlon@sba.gov>; Westbrook, Jonathon (Temp) <Jonathon.Westbrook@sba.gov>; Hernandez, Elias <elias.hernandez@sba.gov>; Gray, Christopher S. <Christopher.Gray@sba.gov>; Hershey, Michael S <Michael.Hershey@sba.gov>; Nelson, Nicole M. <Nicole.Nelson@sba.gov>; Perriello, Tami L. <Tami.Perriello@sba.gov>; 'Manger, William M.' <William.Manger@sba.gov>; Kupfer, Jeffrey F. <Jeffrey.Kupfer@sba.gov>; Ford, Delorice Price <delorice.ford@sba.gov>; Bluestein, Keith A. <Keith.Bluestein@sba.gov>; Monchek, Rafaela <Rafaela.Monchek@sba.gov>; Spampinato, Francis C. <Francis.Spampinato@sba.gov>; Rivera, James E. <james.rivera@sba.gov>; Gutierrez, Allen M <Allen.Gutierrez@sba.gov>; Richards, Amber G. <Amber.Richards@sba.gov>

Cc: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>; Carson, Barbara E. <barbara.carson@sba.gov>; Stubblefield, Larry <Larry.Stubblefield@sba.gov>; Billimoria, Jim (jim.billimoria@sba.gov) <jim.billimoria@sba.gov>; Erin S. McCracken <Erin.McCracken@sba.gov>; Wilkerson, Carol R. <carol.wilkerson@sba.gov>

Subject: Brief Transition Update ***PLEASE DO NOT FORWARD--FOR TRANSITION POCs ONLY***

Everyone,

(b) (5)
[REDACTED]

(b) (5)

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Steve

Stephen Kong
Acting COO & Senior Advisor for Policy and Planning
Office of the Administrator

U.S. Small Business Administration

Office: (202) 205-6100

Cell: [REDACTED]

stephen.kong@sba.gov



From: [Kurtenbach, Daniel J.](#)
To: [Vallante, Michael A.](#)
Subject: Re: Call time
Date: Monday, November 30, 2020 8:52:50 AM

Hi Mike,

Your OFO call with transition team is 1pm ET. We have many other calls throughout the day and week for other program offices, but the only OFO call we have scheduled is the 1pm ET call today.

Thanks, and please let me know if you have any other questions.

Best,
Dan

Daniel J. Kurtenbach
White House Fellow
U.S. Small Business Administration
(202) 940-6367

From: Vallante, Michael A. <Michael.Vallante@sba.gov>
Date: Monday, November 30, 2020 at 8:18 AM
To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Subject: Call time

Dan

What time (eastern) is the call with transition people and OFO? I thought it was 11 EST but my calendar is showing 1:00 pm EST

Thanks
Mike

Get [Outlook for iOS](#)

From: [Kurtenbach, Daniel J.](#)
To: [Kong, Stephen D.](#); [Stubblefield, Larry](#); [Carson, Barbara E.](#)
Subject: Re: Carson in Transition(s)
Date: Monday, December 14, 2020 9:51:23 AM

I'll be on the OFO call and can kick it off.

From: Kong, Stephen D. <Stephen.Kong@sba.gov>
Date: Monday, December 14, 2020 at 9:50 AM
To: Stubblefield, Larry <Larry.Stubblefield@sba.gov>, Carson, Barbara E. <barbara.carson@sba.gov>
Cc: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Subject: RE: Carson in Transition(s)

Need you or Dan to kick this meeting off w/intros

From: Stubblefield, Larry <Larry.Stubblefield@sba.gov>
Sent: Monday, December 14, 2020 8:59 AM
To: Carson, Barbara E. <barbara.carson@sba.gov>
Cc: Kong, Stephen D. <Stephen.Kong@sba.gov>; Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Subject: RE: Carson in Transition(s)

Hi Barb – I wish you all the best in ODA.

I plan to cover the 10 am ART/OFO call, as well as the OCA engagement this afternoon.

Best

Larry

Larry Stubblefield
Associate Administrator
Office of Veterans Business Development
U.S. Small Business Administration
(202) 205-6773
Cell: 202-615-5718
larry.stubblefield@sba.gov

From: Carson, Barbara E. <barbara.carson@sba.gov>
Sent: Monday, December 14, 2020 6:40 AM
To: Kong, Stephen D. <Stephen.Kong@sba.gov>; Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>; Stubblefield, Larry <Larry.Stubblefield@sba.gov>
Subject: Carson in Transition(s)

Good morning!

Today is my first “on the ground” day in ODA after spending last week transitioning GCBD duties to John Klein. My phone has not yet transferred so please use my cell if urgent [REDACTED]

Today I will plan to cover the Size Standards brief with the ART. The lead for the Size Standards office has been on (b) (6) [REDACTED] and may return today for this meeting but I am not certain.

If needed I can attend OCA—just let me know.

Have a great morning,
Barb

Barbara E. Carson
Deputy Associate Administrator
Office of Disaster Assistance
U.S. Small Business Administration
(202) 205-7026
barbara.carson@sba.gov



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From: [Kurtenbach, Daniel J.](#)
To: [Yousefi, Mandana](#)
Subject: Re: Checking In
Date: Tuesday, November 10, 2020 9:25:29 AM

Hi Mandana,

Great question. I'm working with Steve on this, and it sounds like we're waiting on direction from the administrator to do some of the actions that were recommended from last transition (have administrator put out a message, conduct a town hall, Q&A, etc.). Regarding other prep, consensus appears to be that we need to wait for the GSA ascertainment before giving any direction.

We already have the plan and team set up to receive Biden's folks when the ascertainment occurs.

Glad to hop on a call to discuss!

Thanks,
Dan

From: Yousefi, Mandana <mandana.yousefi@sba.gov>
Date: Monday, November 9, 2020 at 2:51 PM
To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Cc: Rubio Ritter, Ilene P. <Ilene.Rubio@sba.gov>
Subject: Checking In

Hi Daniel,

Checking in to see what kind of work may be needed to prepare for the incoming transition team. Let me know.

Thanks,

Mandana Yousefi
Office of Continuous Operations and Risk Management
U.S. Small Business Administration
(202) 205-7411

From: [Kurtenbach, Daniel J.](#)
To: [Carson, Barbara E.](#); [Kong, Stephen D.](#)
Cc: [Stubblefield, Larry](#)
Subject: RE: CLEAN version NDA
Date: Wednesday, November 25, 2020 8:02:00 AM
Attachments: [Transition - Nondisclosure Agreement Template \(2016\).pdf.docx](#)

Thanks, Barb! (b) (5)

[REDACTED]

Dan

From: Carson, Barbara E. <barbara.carson@sba.gov>
Sent: Tuesday, November 24, 2020 3:45 PM
To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>; Kong, Stephen D. <Stephen.Kong@sba.gov>
Cc: Stubblefield, Larry <Larry.Stubblefield@sba.gov>
Subject: CLEAN version NDA

From: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Sent: Tuesday, November 24, 2020 4:42 PM
To: Carson, Barbara E. <barbara.carson@sba.gov>; Kong, Stephen D. <Stephen.Kong@sba.gov>
Cc: Stubblefield, Larry <Larry.Stubblefield@sba.gov>
Subject: RE: Program Office Prep

[REDACTED]

From: Carson, Barbara E. <barbara.carson@sba.gov>
Sent: Tuesday, November 24, 2020 3:39 PM
To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>; Kong, Stephen D. <Stephen.Kong@sba.gov>
Cc: Stubblefield, Larry <Larry.Stubblefield@sba.gov>
Subject: RE: Program Office Prep

[REDACTED]

From: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Sent: Tuesday, November 24, 2020 4:34 PM
To: Kong, Stephen D. <Stephen.Kong@sba.gov>; Carson, Barbara E. <barbara.carson@sba.gov>
Cc: Stubblefield, Larry <Larry.Stubblefield@sba.gov>
Subject: RE: Program Office Prep

[REDACTED]

(b) (5)

Dan

From: Kong, Stephen D. <Stephen.Kong@sba.gov>
Sent: Tuesday, November 24, 2020 3:31 PM
To: Carson, Barbara E. <barbara.carson@sba.gov>; Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Cc: Stubblefield, Larry <Larry.Stubblefield@sba.gov>
Subject: RE: Program Office Prep

From: Carson, Barbara E. <barbara.carson@sba.gov>
Sent: Tuesday, November 24, 2020 4:25 PM
To: Kong, Stephen D. <Stephen.Kong@sba.gov>; Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Cc: Stubblefield, Larry <Larry.Stubblefield@sba.gov>
Subject: Program Office Prep

Steve, Dan,
Is there any support you need at this time? I'm not taking leave this week.

Will you be sending guidance to program AA's and DAA's this week?

Barb

Barbara E. Carson
Deputy Associate Administrator
Office of Government Contracting and Business Development
U.S. Small Business Administration
(202) 205-6459
barbara.carson@sba.gov



U.S. Small Business
Administration

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From: [Kurtenbach, Daniel J.](#)
To: [Kopperud, Anna E.](#)
Subject: Re: Dan/Anna intros
Date: Monday, December 14, 2020 2:54:47 PM

Hi Anna,

I don't see a phone number on the invite, but let me know where you'd like me to call if you'd prefer not to dial in to Teams. Thanks!

Dan
515-231-5805

From: Kopperud, Anna E. <Anna.Kopperud@sba.gov>
Date: Monday, December 14, 2020 at 7:48 AM
To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Subject: Accepted: Dan/Anna intros

Just added a phone number for us1 Anna

From: [Kurtenbach, Daniel J.](#)
To: [Manger, William M.](#)
Cc: [Kong, Stephen D.](#); [Kupfer, Jeffrey F.](#); [Kucharski, Stephen W.](#)
Subject: Re: Demos/walkthroughs of 2 Capital Access Systems
Date: Wednesday, December 16, 2020 1:07:47 PM

This is this something we can combine with tomorrow's call? If so, who should I add to cover?

Thanks,
Dan

From: Manger, William M. <William.Manger@sba.gov>
Date: Wednesday, December 16, 2020 at 12:29 PM
To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Cc: Kong, Stephen D. <Stephen.Kong@sba.gov>, Kupfer, Jeffrey F. <Jeffrey.Kupfer@sba.gov>, Kucharski, Stephen W. <Stephen.Kucharski@sba.gov>
Subject: RE: Demos/walkthroughs of 2 Capital Access Systems

I am fine with the second bullet below, but that's it.

From: Arthur Plews <aplews@ptt.gov>
Sent: Wednesday, December 16, 2020 11:25 AM
To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Cc: Kong, Stephen D. <Stephen.Kong@sba.gov>; Ellen Kim <eekim@ptt.gov>; Jonathan Swain <jswain@ptt.gov>; Clifton Kellogg <ckellogg@ptt.gov>; Michael Roth <mroth@ptt.gov>; David Chang <dchang@ptt.gov>; Manger, William M. <William.Manger@sba.gov>; Kupfer, Jeffrey F. <Jeffrey.Kupfer@sba.gov>
Subject: Re: Demos/walkthroughs of 2 Capital Access Systems

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Thanks Dan.

(b) (5) [REDACTED]
[REDACTED]
[REDACTED]

[REDACTED]
[REDACTED]

- [REDACTED]
[REDACTED]
[REDACTED]
- [REDACTED]

[REDACTED]

Best,

Arthur

On Tue, Dec 15, 2020 at 2:19 PM Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov> wrote:

+ Bill and Jeff

Hi Arthur,

(b) (5)

[REDACTED]

[REDACTED]

Thanks much, and feel free to reach out with questions.

Best,
Dan

Daniel J. Kurtenbach
White House Fellow
U.S. Small Business Administration
(202) 940-6367

From: Arthur Plews <aplews@ptt.gov>

Date: Monday, December 14, 2020 at 10:58 PM

To: Kong, Stephen D. <Stephen.Kong@sba.gov>, Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>

Cc: Ellen Kim <EEKIM@ptt.gov>, Jonathan Swain <jswain@ptt.gov>, Clifton Kellogg <ckellogg@ptt.gov>, Michael Roth <mroth@ptt.gov>, David Chang <dchang@ptt.gov>

Subject: Demos/walkthroughs of 2 Capital Access Systems

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Hi Steve and Dan,

[REDACTED]

[REDACTED]

- [REDACTED]
- [REDACTED]

[REDACTED]

Best,

Arthur Plews

From: [Kurtenbach, Daniel J.](#)
To: [Arthur Plews](#); [Kong, Stephen D.](#)
Cc: [Ellen Kim](#); [Jonathan Swain](#); [Clifton Kellogg](#); [Michael Roth](#); [David Chang](#); [Manger, William M.](#); [Kupfer, Jeffrey F.](#)
Subject: Re: Demos/walkthroughs of 2 Capital Access Systems
Date: Tuesday, December 15, 2020 2:19:34 PM

+ Bill and Jeff

Hi Arthur,

(b) (5) [REDACTED]

[REDACTED]

Thanks much, and feel free to reach out with questions.

Best,
Dan

Daniel J. Kurtenbach
White House Fellow
U.S. Small Business Administration
(202) 940-6367

From: Arthur Plews <aplews@ptt.gov>
Date: Monday, December 14, 2020 at 10:58 PM
To: Kong, Stephen D. <Stephen.Kong@sba.gov>, Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Cc: Ellen Kim <eekim@ptt.gov>, Jonathan Swain <jswain@ptt.gov>, Clifton Kellogg <ckellogg@ptt.gov>, Michael Roth <mroth@ptt.gov>, David Chang <dchang@ptt.gov>
Subject: Demos/walkthroughs of 2 Capital Access Systems

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Hi Steve and Dan,

[REDACTED]

- [REDACTED]
- [REDACTED]

[REDACTED]

Best,

Arthur Plews

From: [Kurtenbach, Daniel J.](#)
To: [Kucharski, Stephen W.](#); [Manger, William M.](#); [Kong, Stephen D.](#)
Cc: [Kim, Jihoon](#)
Subject: Re: Demos/walkthroughs of 2 Capital Access Systems
Date: Tuesday, December 15, 2020 2:09:58 PM

That's fine, I can add them if I have their email address, otherwise you can just forward the invite after I send it out. Thanks Steve.

Dan

From: Kucharski, Stephen W. <Stephen.Kucharski@sba.gov>
Date: Tuesday, December 15, 2020 at 2:08 PM
To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>, Manger, William M. <William.Manger@sba.gov>, Kong, Stephen D. <Stephen.Kong@sba.gov>
Cc: Kim, Jihoon <Jihoon.Kim@sba.gov>
Subject: RE: Demos/walkthroughs of 2 Capital Access Systems

Hi Dan,

(b) (5)

Thanks
Steve

From: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Sent: Tuesday, December 15, 2020 2:04 PM
To: Manger, William M. <William.Manger@sba.gov>; Kong, Stephen D. <Stephen.Kong@sba.gov>
Cc: Kucharski, Stephen W. <Stephen.Kucharski@sba.gov>; Kim, Jihoon <Jihoon.Kim@sba.gov>
Subject: Re: Demos/walkthroughs of 2 Capital Access Systems

Thanks, Bill.

Steve and Jihoon – please let me know who else you'd like in the meeting. I'll try to schedule based on your availability on Thursday.

Best,
Dan

From: Manger, William M. <William.Manger@sba.gov>
Date: Tuesday, December 15, 2020 at 12:59 PM
To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>, Kong, Stephen D. <Stephen.Kong@sba.gov>
Cc: Kucharski, Stephen W. <Stephen.Kucharski@sba.gov>, Kim, Jihoon <Jihoon.Kim@sba.gov>
Subject: RE: Demos/walkthroughs of 2 Capital Access Systems

Dan,

(b) (5)

Thank you,
Bill

From: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Sent: Tuesday, December 15, 2020 9:57 AM
To: Manger, William M. <William.Manger@sba.gov>; Kong, Stephen D. <Stephen.Kong@sba.gov>
Subject: FW: Demos/walkthroughs of 2 Capital Access Systems

Bill,

Thanks,
Dan

From: Arthur Plews <aplews@ptt.gov>
Date: Monday, December 14, 2020 at 10:58 PM
To: Kong, Stephen D. <Stephen.Kong@sba.gov>, Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Cc: Ellen Kim <EEKIM@ptt.gov>, Jonathan Swain <jswain@ptt.gov>, Clifton Kellogg <ckellogg@ptt.gov>, Michael Roth <mroth@ptt.gov>, David Chang <dchang@ptt.gov>
Subject: Demos/walkthroughs of 2 Capital Access Systems

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Hi Steve and Dan,

- [REDACTED]
- [REDACTED]

Best,

Arthur Plews

From: [Kurtenbach, Daniel J.](#)
To: [Arthur Plews](#)
Cc: [Kong, Stephen D.](#); [Ellen Kim](#); [Jonathan Swain](#); [Clifton Kellogg](#); [Michael Roth](#); [David Chang](#); [Manger, William M.](#); [Kupfer, Jeffrey F.](#)
Subject: Re: Demos/walkthroughs of 2 Capital Access Systems
Date: Wednesday, December 16, 2020 2:14:20 PM

Hi Arthur,

(b) (5) [REDACTED]

Best,
Dan

From: Arthur Plews <aplews@ptt.gov>
Date: Wednesday, December 16, 2020 at 11:25 AM
To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Cc: Kong, Stephen D. <Stephen.Kong@sba.gov>, Ellen Kim <eekim@ptt.gov>, Jonathan Swain <jswain@ptt.gov>, Clifton Kellogg <ckellogg@ptt.gov>, Michael Roth <mroth@ptt.gov>, David Chang <dchang@ptt.gov>, Manger, William M. <William.Manger@sba.gov>, Kupfer, Jeffrey F. <Jeffrey.Kupfer@sba.gov>
Subject: Re: Demos/walkthroughs of 2 Capital Access Systems

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Thanks Dan.

[REDACTED]

[REDACTED]

- [REDACTED]
- [REDACTED]

Best,

Arthur

On Tue, Dec 15, 2020 at 2:19 PM Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov> wrote:

+ Bill and Jeff

Hi Arthur,

(b) (5)

Thanks much, and feel free to reach out with questions.

Best,
Dan

Daniel J. Kurtenbach
White House Fellow
U.S. Small Business Administration
(202) 940-6367

From: Arthur Plews <aplews@ptt.gov>

Date: Monday, December 14, 2020 at 10:58 PM

To: Kong, Stephen D. <Stephen.Kong@sba.gov>, Kurtenbach, Daniel J.
<Daniel.Kurtenbach@sba.gov>

Cc: Ellen Kim <EEKIM@ptt.gov>, Jonathan Swain <jswain@ptt.gov>, Clifton Kellogg
<ckellogg@ptt.gov>, Michael Roth <mroth@ptt.gov>, David Chang <dchang@ptt.gov>

Subject: Demos/walkthroughs of 2 Capital Access Systems

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Hi Steve and Dan,

•

•

Best,

Arthur Plews

From: [Kurtenbach, Daniel J.](#)
To: [Kupfer, Jeffrey F.](#)
Subject: Re: First Political Appointee Hire
Date: Wednesday, December 23, 2020 9:55:17 PM
Attachments: [image001.png](#)

(b) (5)



Talk soon,
Dan

From: Kupfer, Jeffrey F. <Jeffrey.Kupfer@sba.gov>
Date: Wednesday, December 23, 2020 at 6:45 PM
To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Subject: RE: First Political Appointee Hire




From: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Sent: Wednesday, December 23, 2020 4:39 PM
To: Kupfer, Jeffrey F. <Jeffrey.Kupfer@sba.gov>
Subject: Fwd: First Political Appointee Hire

FYI.

Daniel J. Kurtenbach
White House Fellow
U.S. Small Business Administration
(202) 940-6367

From: Kong, Stephen D. <Stephen.Kong@sba.gov>
Sent: Wednesday, December 23, 2020 3:59 PM
To: Michele Chang; Hernandez, Elias
Cc: Kurtenbach, Daniel J.
Subject: RE: First Political Appointee Hire

Hi Michele—see below

1. Paperwork/Info needed for politicalals—

Overview:

- Candidate information
 - o Full Name
 - o Mailing Address
 - o Phone #
 - o Email
 - o Date of Birth
 - o 5 years of salary history (if available)
 - Position Information
 - o PD (if classified; if not, we will work with the White Liaison or other identified contact)
 - o Office / Position Title / Security Level
 - o Tentative Grade (we will work with the requestor to ensure resume experience aligns)
 - Start Information
 - o Requested start date
 - o Proposed salary (typically starts as step 1 of grade)
 - Supporting Documents
 - o Resume (detailed if possible helps with qualifications / placement)
 - o PD (if already classified)
 - o OF-306 (Executive Resources can reach out if preferred due to PII info)
2. As for off-boarding the current politicalals, the answer is yes. Several of the more junior Schedule Cs have already given notice and will be departing at the start of the year. Elias's team and others have a meeting with all of the Schedule Cs on January 5 to brief them on the offboarding process and benefits.
3. As for security clearances, below are the political positions that require Top Secret/SCI, Top Secret and Secret clearances.

Small Business Administration Clearance Holder Positions

Office of the Administrator

Administrator

Deputy Administrator/Chief Operating Officer

Chief of Staff

Deputy Chief of Staff

Office of General Counsel

General Counsel

Associate General Counsel

GCBD

Associate Administrator for GCBD

OFO

Regional Administrator – Region 8 Denver (COOP)

Office of International Trade

Associate Administrator for International Trade

In addition, please note from Joe Eitel (our head of the Office of Personnel Security located in Denver)

Political Appointee Processing

1. The Special Assistant to the Administrator is not currently a [REDACTED] position. I could potential see this as being supported if they are going to be in conversations or meetings with the Administrator where a [REDACTED] would be required. If the transition team feels this should be [REDACTED] – Executive Resources (Elias's shop) can revise the position risk to a [REDACTED]
2. We will check to see if the appointee has a current investigation on file that meets the requirements of the position risk. If not, we will send them the investigative paperwork.
3. We ask that the appointee come in and get fingerprinted/enrolled at the 5th floor security office. This allows us to push fingerprints for the FBI check and issue a PIV card.
4. We review the investigation and associated paperwork for any suitability issues. Serious issues that may warrant an unsuitable finding are worked with the White House Liaison (or designee).
5. Once all the investigative paperwork is back and cleared for suitability issues – our office approves the EOD with Executive Resources and signs the 1228 for network access.

Clearances

1. Political Appointee's at the SECRET level will complete the investigative paperwork as detailed above. They will be granted an INTERIM SECRET while their paperwork is processed at the Defense Counterintelligence and Security Agency (DCSA).
2. Political Appointee's at the TOP SECRET level who currently do not hold a TS clearance will need a waiver from the Administrator (or Acting) before we can grant the INTERIM Top Secret and approve the EOD.

Timelines

Clean packages (no suitability issues) we ask for 5-7 business days (3-4 of those days are given to the appointee to complete the investigation paperwork). Packages that may have suitability issues we keep the White House Liaison (or designee) in the loop on timelines.

All clearances are not granted until a security briefing is conducted and a SF-312 is signed. We then do the grant letters and issue the clearance in DCSA's system. Our preliminary plan is I will come out the week of January 25th and do a group briefing for all political appointee's who require a clearance. Then we can get all of them granted and in place that week.

From: Michele Chang <mchang@ptt.gov>

Sent: Wednesday, December 23, 2020 12:12 PM

To: Kong, Stephen D. <Stephen.Kong@sba.gov>; Hernandez, Elias <elias.hernandez@sba.gov>

Cc: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>

Subject: Re: First Political Appointee Hire

CAUTION - The sender of this message is external to the SBA network. Please use care when clicking on links and responding with sensitive information. Send suspicious email to spam@sba.gov.

Stephen and Elias - Apologies, a couple more questions regarding onboarding of political appointees at SBA:

1) Do you have a list of which political appointees typically have top secret clearance or any clearance level outside of the norm? Our recollection is that is the the Administrator, Deputy Administrator, Chief of Staff and Special Assistant to the Administrator.

2) Can you please let us know what the security clearance and any suitability process is for political appointees at SBA? We want to make sure we are aware of your processes so we can make sure we can get folks through these in a timely manner.

Thank you very much,
Michele

On Wed, Dec 23, 2020 at 12:07 PM Michele Chang <mchang@ptt.gov> wrote:

Hi Stephen and Elias,

Hope you all are well and getting ready hopefully for some time off for the holidays.

Wanted to reach out because we have our first political appointee hire and wanted to see what paperwork and information you all need from the individual to begin processing. Please let me know.

Also, can you please confirm that all current political appointees are preparing to be offboarded?

Please let me know as well.

Thank you so much - and best wishes for a great holiday!

Best,

Michele Chang



From: [Kurtenbach, Daniel J.](#)
To: [Clifton Kellogg](#)
Cc: [Michael Roth](#); [Arthur Plews](#); [Jonathan Swain](#); [Cassius F. Butts](#); [Kong, Stephen D.](#); [Carson, Barbara E.](#); [Stubblefield, Larry](#)
Subject: RE: Follow up meeting with OCA
Date: Thursday, December 3, 2020 8:54:00 AM

+SBA Transition team

Cliff,

You're scheduled for today with OCA at 1pm ET.

I'll schedule those meetings for next week during the next push of invites. Expect those today.

Best,
Dan

Daniel J. Kurtenbach
White House Fellow
U.S. Small Business Administration
(202) 940-6367

From: Clifton Kellogg <ckellogg@jbrpt.org>
Sent: Wednesday, December 2, 2020 8:23 PM
To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Cc: Michael Roth <mroth@volunteer.jbrpt.org>; Arthur Plews <aplews@volunteer.jbrpt.org>; Jonathan Swain <jswain@jbrpt.org>; Cassius F. Butts <cfbutts@jbrpt.org>
Subject: Follow up meeting with OCA

CAUTION - The sender of this message is external to the SBA network. Please use care when clicking on links and responding with sensitive information. Send suspicious email to spam@sba.gov.

Hi Daniel,
Just following up on when the Agency Review Team can meet with OCA tomorrow. Apologies if I overlooked a meeting invitation.

For the meeting agenda, we'd like to start by reviewing the data request from last night.

Next, we would like to schedule meetings with appropriate personnel on:

1. PPP
2. EIDL servicing / liquidation
3. 7a
4. 504
5. Personnel and remaining items
6. Systems

Please let us know when tomorrow is possible to convene.
Thank you!
Cliff

From: Kurtenbach, Daniel J.
To: [Michele Chang](#)
Cc: [Ellen Kim](#); [Jonathan Swain](#); [Kong, Stephen D.](#)
Subject: Re: FW: Request for HR Data and Documentation
Date: Friday, December 4, 2020 9:56:54 AM

From: Michele Chang <mchang@ptt.gov>
Date: Friday, December 4, 2020 at 9:38 AM
To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Cc: Ellen Kim <eekim@jbrpt.org>, Jonathan Swain <jswain@jbrpt.org>, Kong, Stephen D. <Stephen.Kong@sba.gov>
Subject: Re: FW: Request for HR Data and Documentation

CAUTION - The sender of this message is external to the SBA network. Please use care when clicking on links and responding with sensitive information. Send suspicious email to spam@sba.gov.

Dan,

Thank you so much for your note. (b) (5)

[REDACTED]

[REDACTED]

- [REDACTED]
- [REDACTED]

[REDACTED]

- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]

[REDACTED]

Thank you,
Michele Chang

On Thu, Dec 3, 2020 at 3:38 PM Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov> wrote:

Team,

(b) (5)

-

[REDACTED]

-

[REDACTED]

Thanks much,

Dan

From: Hernandez, Elias <elias.hernandez@sba.gov>

Sent: Wednesday, December 2, 2020 2:12 PM

To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>

Cc: Kong, Stephen D. <Stephen.Kong@sba.gov>; Brill, Julie <Julie.Brill@sba.gov>

Subject: RE: Request for HR Data and Documentation

Hi Dan,

We are working on these deliverables but need clarification on the two bullets highlighted below.

Please advise.

Elias

From: Kong, Stephen D. <Stephen.Kong@sba.gov>
Sent: Wednesday, December 2, 2020 11:39 AM
To: Hernandez, Elias <elias.hernandez@sba.gov>; Brill, Julie <Julie.Brill@sba.gov>; Biaggi-Ayer, Denise A. <Denise.Biaggi-Ayer@sba.gov>
Cc: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>; Carson, Barbara E. <barbara.carson@sba.gov>; Stubblefield, Larry <Larry.Stubblefield@sba.gov>; Levine, Nina D. <nina.levine@sba.gov>; Fishman, David A. <david.fishman@sba.gov>; Hunter, Karen L. <Karen.Hunter@sba.gov>
Subject: FW: Request for HR Data and Documentation

Elias,

Please see below. CC'ing the legal team who need to vet the info/materials.

Thanks,

Steve

From: Michele Chang <mchang@jbrpt.org>
Sent: Wednesday, December 2, 2020 11:35 AM
To: Kong, Stephen D. <Stephen.Kong@sba.gov>

From: [Kurtenbach, Daniel J.](#)
To: [Michele Chang](#)
Cc: [Ellen Kim](#); [Jonathan Swain](#); [Kong, Stephen D.](#)
Subject: Re: FW: Request for HR Data and Documentation
Date: Friday, December 4, 2020 10:01:55 AM

Thanks, Michele. Let us huddle with OHRS and get back to you.

Best,
Dan

From: Michele Chang <mchang@ptt.gov>
Date: Friday, December 4, 2020 at 9:38 AM
To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Cc: Ellen Kim <eekim@jbrpt.org>, Jonathan Swain <jswain@jbrpt.org>, Kong, Stephen D. <Stephen.Kong@sba.gov>
Subject: Re: FW: Request for HR Data and Documentation

CAUTION - The sender of this message is external to the SBA network. Please use care when clicking on links and responding with sensitive information. Send suspicious email to spam@sba.gov.

Dan,

Thank you so much for your note (b) (5)

[REDACTED]

- [REDACTED]
- [REDACTED]

[REDACTED]

- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]

[REDACTED]

Thank you,
Michele Chang

On Thu, Dec 3, 2020 at 3:38 PM Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov> wrote:

Team,

(b) (5)

- [REDACTED]

- [REDACTED]

Thanks much,
Dan

From: Hernandez, Elias <elias.hernandez@sba.gov>
Sent: Wednesday, December 2, 2020 2:12 PM
To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Cc: Kong, Stephen D. <Stephen.Kong@sba.gov>; Brill, Julie <Julie.Brill@sba.gov>
Subject: RE: Request for HR Data and Documentation

Hi Dan,

We are working on these deliverables but need clarification on the two bullets highlighted below.

Please advise.

Elias

From: Kong, Stephen D. <Stephen.Kong@sba.gov>

Sent: Wednesday, December 2, 2020 11:39 AM

To: Hernandez, Elias <elias.hernandez@sba.gov>; Brill, Julie <Julie.Brill@sba.gov>; Biaggi-Ayer, Denise A. <Denise.Biaggi-Ayer@sba.gov>

Cc: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>; Carson, Barbara E. <barbara.carson@sba.gov>; Stubblefield, Larry <Larry.Stubblefield@sba.gov>; Levine, Nina D. <nina.levine@sba.gov>; Fishman, David A. <david.fishman@sba.gov>; Hunter, Karen L. <Karen.Hunter@sba.gov>

Subject: FW: Request for HR Data and Documentation

Elias,

Please see below. CC'ing the legal team who need to vet the info/materials.

Thanks,
Steve

From: Michele Chang <mchang@jbrpt.org>

Sent: Wednesday, December 2, 2020 11:35 AM

To: Kong, Stephen D. <Stephen.Kong@sba.gov>

Cc: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>; Ellen Kim <EEKIM@jbrpt.org>; Jonathan Swain <jswain@jbrpt.org>

Subject: Request for HR Data and Documentation

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Stephen,

(b) (5)
[Redacted text block]

- [Redacted]
- [Redacted]
- [Redacted]
- [Redacted]
- [Redacted]
- [Redacted]
- [Redacted]
- [Redacted]
- [Redacted]

(b) (5)

•

Thanks,
Michele Chang

From: [Kurtenbach, Daniel J.](#)
To: [Clifton Kellogg](#)
Cc: [Jonathan Swain](#); [Michael Roth](#); [Arthur Plews](#); [Cassius F. Butts](#); [Kong, Stephen D.](#); [Stubblefield, Larry](#); [Carson, Barbara E.](#)
Subject: RE: OCA Transition Brief
Date: Wednesday, November 25, 2020 3:26:00 PM

+ SBA transition team

Cliff,

Thanks for your note. Let me work internally and get back to you.

Best,
Dan

Daniel J. Kurtenbach
White House Fellow
U.S. Small Business Administration
(515) 231-5805

From: Clifton Kellogg <ckellogg@jbrpt.org>
Sent: Wednesday, November 25, 2020 2:24 PM
To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Cc: Jonathan Swain <jswain@jbrpt.org>; Michael Roth <mroth@volunteer.jbrpt.org>; Arthur Plews <aplews@volunteer.jbrpt.org>; Cassius F. Butts <cfbutts@jbrpt.org>
Subject: Re: OCA Transition Brief

CAUTION - The sender of this message is external to the SBA network. Please use care when clicking on links and responding with sensitive information. Send suspicious email to spam@sba.gov.

Daniel,

(b) (5) [REDACTED]
[REDACTED]
[REDACTED]

[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

[REDACTED]
[REDACTED]
[REDACTED]

(b) (5)

Thank you in advance for your help,
Cliff

On Wed, Nov 25, 2020 at 10:59 AM Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov> wrote:

Please hold for OCA Transition sync with 2020 Agency Review Team.

Microsoft Teams meeting

Join on your computer or mobile app

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Or call in (audio only)

States, Washington DC

Phone Conference

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[Learn More](#) | [Meeting options](#)

From: [Kurtenbach, Daniel J.](#)
To: [Levine, Nina D.](#); [Kong, Stephen D.](#)
Subject: Re: OGC Initial Meeting Follow Up
Date: Wednesday, December 2, 2020 4:39:47 PM

I'll be en route to a meeting downtown, regrettably. No need to add me.

Thanks,
Dan

From: Levine, Nina D. <nina.levine@sba.gov>
Date: Wednesday, December 2, 2020 at 4:38 PM
To: Kong, Stephen D. <Stephen.Kong@sba.gov>, Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Subject: FW: OGC Initial Meeting Follow Up

Steve and Dan, is 9:00 ok? Did you want to join? And should I send the link or will you?

From: Michael Chodos <mchodos@jbrpt.org>
Sent: Wednesday, December 2, 2020 4:36 PM
To: Meredith Shaffer <mshaffer@jbrpt.org>
Cc: Benderson, Eric S. <eric.benderson@sba.gov>; Cantlon, James D. <James.Cantlon@sba.gov>; Jonathan Swain <jswain@jbrpt.org>; Kong, Stephen D. <Stephen.Kong@sba.gov>; Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>; Levine, Nina D. <nina.levine@sba.gov>
Subject: Re: OGC Initial Meeting Follow Up

CAUTION - The sender of this message is external to the SBA network. Please use care when clicking on links and responding with sensitive information. Send suspicious email to spam@sba.gov.

Meredith has family duties which I want to make sure are supported, so 9 am tomorrow sounds good for me too. Nina I think the link needs to come from your side given Agency system security requirements?

On Wed, Dec 2, 2020 at 4:12 PM Meredith Shaffer <mshaffer@jbrpt.org> wrote:

9 works for me, thanks.

On Wed, Dec 2, 2020 at 4:03 PM Levine, Nina D. <nina.levine@sba.gov> wrote:

Any appetite for very early? Eric and I start work at 6:30 am. But maybe 9:00 is more civilized?

From: Michael Chodos <mchodos@jbrpt.org>
Sent: Wednesday, December 2, 2020 4:01 PM
To: Levine, Nina D. <nina.levine@sba.gov>
Cc: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>; Kong, Stephen D. <Stephen.Kong@sba.gov>; Meredith Shaffer <mshaffer@jbrpt.org>; Jonathan Swain

<jswain@jbrpt.org>; Benderson, Eric S. <eric.benderson@sba.gov>; Cantlon, James D. <James.Cantlon@sba.gov>

Subject: Re: OGC Initial Meeting Follow Up

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Other than 10-10:30 a.m., I'm flexible tomorrow before 2 pm. If you have more than one available slot, hopefully we can all pin one of them down.

On Wed, Dec 2, 2020 at 3:50 PM Levine, Nina D. <nina.levine@sba.gov> wrote:

No worries, but I'm afraid we'll have to do it tomorrow. Would early morning work?

From: Michael Chodos <mchodos@jbrpt.org>

Sent: Wednesday, December 2, 2020 3:33 PM

To: Levine, Nina D. <nina.levine@sba.gov>

Cc: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>; Kong, Stephen D. <Stephen.Kong@sba.gov>; Meredith Shaffer <mshaffer@jbrpt.org>; Jonathan Swain <jswain@jbrpt.org>; Benderson, Eric S. <eric.benderson@sba.gov>; Cantlon, James D. <James.Cantlon@sba.gov>

Subject: Re: OGC Initial Meeting Follow Up

CAUTION - The sender of this message is external to the SBA network. Please use care when clicking on links and responding with sensitive information. Send suspicious email to spam@sba.gov.

Afternoon Nina: I apologize for the delay in getting back to you. Can hop on at 4:30 pm EST today if that still works for you; if not, do you have any available times tomorrow?

On Wed, Dec 2, 2020 at 10:09 AM Levine, Nina D. <nina.levine@sba.gov> wrote:

Michael, we'd be happy to do a call with you on this later today if that works for your schedule. Please let me know.

Thanks,
Nina

From: Michael Chodos <mchodos@jbrpt.org>

Sent: Wednesday, December 2, 2020 8:50 AM

To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>; Kong, Stephen D. <Stephen.Kong@sba.gov>; Levine, Nina D. <nina.levine@sba.gov>

Cc: Meredith Shaffer <mshaffer@jbrpt.org>; Jonathan Swain <jswain@jbrpt.org>

Subject: OGC Initial Meeting Follow Up

CAUTION - The sender of this message is external to the SBA network. Please use care when clicking on links and responding with sensitive information. Send suspicious email to spam@sba.gov.

Dear Daniel, Stephen and Nina:

It was a great pleasure meeting you Daniel and Stephen, and so nice to see you Nina along with Eric and Jamie.

Thank you again for taking the time for our initial OGC-Transition Team meeting on Monday.

(b) (5) [REDACTED]

[REDACTED]

[REDACTED]

All my best,

Michael Chodos

From: [Kurtenbach, Daniel J.](#)
To: [Levine, Nina D.](#)
Subject: Re: OGC Initial Meeting Follow Up
Date: Wednesday, December 2, 2020 4:41:47 PM

I don't believe I need to attend this one. No need to reschedule. Thanks for the offer!

Dan

From: Levine, Nina D. <nina.levine@sba.gov>
Date: Wednesday, December 2, 2020 at 4:40 PM
To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Subject: RE: OGC Initial Meeting Follow Up

Sorry, Dan, I should have asked if you would like me to reschedule. It does not have to be at 9:00.

From: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Sent: Wednesday, December 2, 2020 4:40 PM
To: Levine, Nina D. <nina.levine@sba.gov>; Kong, Stephen D. <Stephen.Kong@sba.gov>
Subject: Re: OGC Initial Meeting Follow Up

I'll be en route to a meeting downtown, regrettably. No need to add me.

Thanks,
Dan

From: Levine, Nina D. <nina.levine@sba.gov>
Date: Wednesday, December 2, 2020 at 4:38 PM
To: Kong, Stephen D. <Stephen.Kong@sba.gov>, Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Subject: FW: OGC Initial Meeting Follow Up

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Cc: Benderson, Eric S. <eric.benderson@sba.gov>; Cantlon, James D. <James.Cantlon@sba.gov>; Jonathan Swain <jswain@jbrpt.org>; Kong, Stephen D. <Stephen.Kong@sba.gov>; Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>; Levine, Nina D. <nina.levine@sba.gov>
Subject: Re: OGC Initial Meeting Follow Up

CAUTION - The sender of this message is external to the SBA network. Please use care when clicking on links and responding with sensitive information. Send suspicious email to spam@sba.gov.

Meredith has family duties which I want to make sure are supported, so 9 am tomorrow sounds good for me too. Nina I think the link needs to come from your side given Agency system security requirements?

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To: Levine, Nina D. <nina.levine@sba.gov>

Cc: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>; Kong, Stephen D.

<Stephen.Kong@sba.gov>; Meredith Shaffer <mshaffer@jbrpt.org>; Jonathan Swain

<jswain@jbrpt.org>; Benderson, Eric S. <eric.benderson@sba.gov>; Cantlon, James D.

<James.Cantlon@sba.gov>

Subject: Re: OGC Initial Meeting Follow Up

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Sent: Wednesday, December 2, 2020 3:33 PM

To: Levine, Nina D. <nina.levine@sba.gov>

Cc: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>; Kong, Stephen D.

<Stephen.Kong@sba.gov>; Meredith Shaffer <mshaffer@jbrpt.org>; Jonathan Swain

<jswain@jbrpt.org>; Benderson, Eric S. <eric.benderson@sba.gov>; Cantlon, James D.

<James.Cantlon@sba.gov>

Subject: Re: OGC Initial Meeting Follow Up

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today if that still works for you; if not, do you have any available times tomorrow?

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Michael, we'd be happy to do a call with you on this later today if that works for your schedule. Please let me know.

Thanks,
Nina

From: Michael Chodos <mchodos@jbrpt.org>

Sent: Wednesday, December 2, 2020 8:50 AM

To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>; Kong, Stephen D. <Stephen.Kong@sba.gov>; Levine, Nina D. <nina.levine@sba.gov>

Cc: Meredith Shaffer <mshaffer@jbrpt.org>; Jonathan Swain <jswain@jbrpt.org>

Subject: OGC Initial Meeting Follow Up

CAUTION - The sender of this message is external to the SBA network. Please use care when clicking on links and responding with sensitive information. Send suspicious email to spam@sba.gov.

Dear Daniel, Stephen and Nina:

It was a great pleasure meeting you Daniel and Stephen, and so nice to see you Nina along with Eric and Jamie.

Thank you again for taking the time for our initial OGC-Transition Team meeting on Monday.

I wanted to follow up with a couple of initial items, per our conversation. I've no doubt we will have further follow-ups shortly:

(b) (5)
[Redacted text block]

[Redacted text block]

All my best,

Michael Chodos

From: [Kurtenbach, Daniel J.](#)
To: [Arthur Plews](#)
Subject: Re: OIT Initial Transition Sync
Date: Sunday, November 29, 2020 12:49:46 PM

Arthur,

They are cc'ed on the invite. Thanks much.

Best,
Dan

Daniel J. Kurtenbach
White House Fellow
U.S. Small Business Administration
(515) 231-5805

From: Arthur Plews <aplews@jbrpt.org>
Date: Saturday, November 28, 2020 at 9:25 PM
To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Subject: Re: OIT Initial Transition Sync

CAUTION - The sender of this message is external to the SBA network. Please use care when clicking on links and responding with sensitive information. Send suspicious email to spam@sba.gov.

Hi Daniel,

Thanks for sending this, and looking forward to the discussion. Would it be possible to add 2 additional transition team members to the invitation?

- Cassius Butts (cfbutts@jbrt.org)
- Jonathan Swain (jswain@jbprt.org)

Best,

Arthur

On Wed, Nov 25, 2020 at 9:57 AM Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov> wrote:

Please hold for initial OIT transition sync with incoming Agency Review Team.

—

Microsoft Teams meeting

Join on your computer or mobile app

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Or call in (audio only)

[REDACTED] ed States, Washington DC

Phone Conference ID: [REDACTED]

[Find a local number](#) | [Reset PIN](#)



[Learn More](#) | [Meeting options](#)

—

From: [Kurtenbach, Daniel J.](#)
To: [Schimpp, Michele J.](#); [Kong, Stephen D.](#); [Greene, Loretta S.](#)
Cc: [Carson, Barbara E.](#); [Stubblefield, Larry](#); [Levine, Nina D.](#)
Subject: RE: OIT meeting agenda and participants
Date: Monday, November 30, 2020 12:42:00 PM
Attachments: [01d. SBA Component Offices Divisions.pdf](#)

Hello,

Attached is the finished version of the document that covers OIT (and all other program offices).

The link for the final version is also here:

[REDACTED]

Thanks, and please reach out with any additional questions.

Best,
Dan

Daniel J. Kurtenbach
White House Fellow
U.S. Small Business Administration
(202) 940-6367

From: Schimpp, Michele J. <michele.schimpp@sba.gov>
Sent: Monday, November 30, 2020 11:39 AM
To: Kong, Stephen D. <Stephen.Kong@sba.gov>; Greene, Loretta S. <Loretta.Greene@sba.gov>
Cc: Carson, Barbara E. <barbara.carson@sba.gov>; Stubblefield, Larry <Larry.Stubblefield@sba.gov>; Levine, Nina D. <nina.levine@sba.gov>; Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Subject: RE: OIT meeting agenda and participants

Hi, I just tried to pull the OIT section of the Transition Team briefing book and the link is no longer accessible. Would it be possible to send us our excerpt so that we can have what they have on hand?

Many thanks,

Michele

From: Kong, Stephen D. <Stephen.Kong@sba.gov>
Sent: Monday, November 30, 2020 12:21 PM
To: Greene, Loretta S. <Loretta.Greene@sba.gov>; Schimpp, Michele J. <michele.schimpp@sba.gov>
Cc: Carson, Barbara E. <barbara.carson@sba.gov>; Stubblefield, Larry <Larry.Stubblefield@sba.gov>; Levine, Nina D. <nina.levine@sba.gov>; Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Subject: FW: OIT meeting agenda and participants

From: Ellen Kim <EEKIM@jbrpt.org>

Sent: Monday, November 30, 2020 11:58 AM

To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>; Kong, Stephen D. <Stephen.Kong@sba.gov>

Cc: Cassius F. Butts <cfbutts@jbrpt.org>; Jonathan Swain <jswain@jbrpt.org>

Subject: OIT meeting agenda and participants

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Good morning,

(b) (5) [REDACTED]

Please don't hesitate to let us know if you have any questions. We look forward to the discussion.

Best,
Ellen

From: [Kurtenbach, Daniel J.](#)
To: [Kong, Stephen D.](#)
Subject: RE: SBA Agency Review (Biden-Harris Transition)
Date: Tuesday, November 24, 2020 8:37:00 AM

(b) (5)

I do have other meetings from 12pm-3pm so my responses might be a bit delayed during that time, but completely free post-3pm.

Best,
Dan
515-231-5805

From: Kong, Stephen D. <Stephen.Kong@sba.gov>
Sent: Tuesday, November 24, 2020 7:33 AM
To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Subject: FW: SBA Agency Review (Biden-Harris Transition)

Dan, I'll send an email back to these guys, but can you be ready to set up a Teams meeting at 4 pm today?

From: Jonathan Swain <jswain@jbrpt.org>
Sent: Monday, November 23, 2020 7:15 PM
To: Kong, Stephen D. <Stephen.Kong@sba.gov>; Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Cc: Ellen Kim <EEKIM@jbrpt.org>
Subject: SBA Agency Review (Biden-Harris Transition)

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Dear Stephen and Daniel -

On behalf of the Biden-Harris Transition Team, I am reaching out as the Agency Review Team Lead for the U.S. Small Business Administration.

I look forward to engaging with you and your team, and am grateful for the time and effort that has gone into preparing transition briefings and reference materials. To start, I would like to **arrange for a call or video meeting to discuss next steps**, including logistics for the review. Would you be available for an introductory call/video meeting with Ellen Kim (cced) and myself **tomorrow (Nov. 24)**? Would something **before 11:30am or after 2pm tomorrow** work for both of you? If not, please let us know what time would be convenient for you.

Additionally, here is a list of priority briefings that we are hoping to schedule as soon as possible:

-
- COVID-19
-
-
- Office of Capital Access
-
-
- Office of Disaster Assistance
-
-
- Agency Operations and Budget (including
- Personnel, COO, CIO and CFO)
-
-
- Office of Entrepreneurial Development,
- including Office of Women's Business Ownership, SBDC and SCORE
-
-
- Office of Government Contracting and Business
- Development
-
-
- Office of Investment and Innovation Programs
-
-
- Office of Field Operations
-
-
- Office of General Counsel
-
-
- Office of Veterans Business Development

-
-
- Office of Native American Affairs
-
-
- Office of International Trade
-
-
- Office of Advocacy
-
-
- Office of the Ombudsman
-

[A list of authorized team members can be found here](#), and I will keep you apprised of any modifications. This list has also been provided to the Federal Transition Coordinator, Mary Gibert.

If you are able to share any unclassified briefing or reference materials by email, I would welcome your doing so at your earliest convenience.

I look forward to working with you. Thank you again.

Sincerely,
Jonathan Swain
Lead, SBA Agency Review Team
Biden-Harris Transition Team

Cc: Ellen Kim, SBA Agency Review Team, Deputy Lead

From: [Kurtenbach, Daniel J.](#)
To: [Kupfer, Jeffrey F.](#); [Kong, Stephen D.](#)
Subject: Re: SBA transition team
Date: Wednesday, November 11, 2020 9:59:25 AM

Thanks, Jeff. (b) (5)

Dan

Daniel J. Kurtenbach
White House Fellow
U.S. Small Business Administration
(202) 940-6367

From: Kupfer, Jeffrey F. <Jeffrey.Kupfer@sba.gov>
Sent: Wednesday, November 11, 2020 9:52:42 AM
To: Kong, Stephen D. <Stephen.Kong@sba.gov>; Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Subject: FW: SBA transition team

Assume you guys have seen this...

Small Business Administration

Name	Most Recent Employment	Source of Funding
Jonathan Swain, Team Lead	Harvard University	Volunteer
Xavier Briggs	New York University	Volunteer
Liyan David Chang	Devoted Health	Volunteer
Michele Chang	Markle Foundation	Volunteer
Michael Chodos	Medsphere Systems Corporation	Volunteer
Isabel Guzman	State of California, Governor's Office of Business & Economic Development	Volunteer
Bibi Hidalgo	Future Partners LLC	Volunteer
David Hinson	Ategra Capital Management	Volunteer
Chris James	The National Center for American Indian Enterprise Development	Volunteer
Clifton Kellogg	C-PACE Alliance	Volunteer
Ellen Kim	Roti Modern Mediterranean	Volunteer
Arthur Plews	Stripe	Volunteer
Michael Roth	Next Street	Volunteer
Meredith Shaffer	Public Private Strategies	Volunteer
Jorge Silva-Puras	Universidad del Sagrado Corazón in San Juan	Volunteer

From: [Kurtenbach, Daniel J.](#)
To: [Fishman, David A.](#); [Kong, Stephen D.](#)
Cc: [Biles, Brittany W.](#); [Benderson, Eric S.](#); [Hunter, Karen L.](#); [Carson, Barbara E.](#)
Subject: RE: SBA-2021-002818
Date: Thursday, January 7, 2021 2:53:00 PM
Attachments: [PDF.zip](#)

Hi David,

I'll defer to Steve on their use, but here is a compressed zip file of everything for the pre-election transition briefing book.

Thanks,
Dan

Daniel J. Kurtenbach
White House Fellow
U.S. Small Business Administration
(202) 940-6367

From: Fishman, David A. <david.fishman@sba.gov>
Sent: Thursday, January 7, 2021 1:19 PM
To: Kong, Stephen D. <Stephen.Kong@sba.gov>
Cc: Biles, Brittany W <Brittany.Biles@sba.gov>; Benderson, Eric S. <eric.benderson@sba.gov>; Hunter, Karen L. <Karen.Hunter@sba.gov>; Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>; Carson, Barbara E. <barbara.carson@sba.gov>
Subject: FW: SBA-2021-002818

Steve,

Happy New Year. Hope you are doing well.

We received a FOIA request for the 2020 Briefing Book from a frequent FOIA requestor Mr. Michael Ravnitzky. He has requested: A digital/electronic copy of the transition briefing document(s) (late 2020) prepared by the SBA for the incoming Biden Administration. We also received a similar request from another requestor, Ben Hulac from the Congressional Quarterly. CQ asks for: All Small Business Administration briefing materials prepared in 2020 for the incoming administration under the Presidential Transition Act, including organizational charts, succession plans, PowerPoint presentations, secretarial orders about succession planning and any final records prepared to brief officials representing the incoming administration. (b) (5)

[REDACTED]

(b) (5)

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Please let me know if you would like to discuss this or if you have any questions.

Sincerely,

David

David A. Fishman
Senior Legal Counsel
For FOIA and Privacy Act
U.S. Small Business Administration
Office: (202) 205-6861
Mobile: [REDACTED]
david.fishman@sba.gov



U.S. Small Business
Administration

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From: Kurtenbach, Daniel J.
To: [Carson, Barbara E.](#)
Subject: Re: Size Standards - GCBD/ART Sync
Date: Monday, December 14, 2020 10:08:02 AM

I'll check your schedule to see what works best.

Thanks,
Dan
515-231-5805

From: Google Calendar <calendar-notification@google.com>
Date: Monday, December 14, 2020 at 10:07 AM
To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>, aplews@ptt.gov <aplews@ptt.gov>, Carson, Barbara E. <barbara.carson@sba.gov>, bhidalgo@ptt.gov <bhidalgo@ptt.gov>, Spampinato, Francis C. <Francis.Spampinato@sba.gov>, Laboy-Bruno, Jorge L. <Jorge.Laboy-Bruno@sba.gov>, Sharma, Khem <Khem.Sharma@sba.gov>, Le, Sam Q. <sam.le@sba.gov>, mchang@ptt.gov <mchang@ptt.gov>
Subject: Size Standards - GCBD/ART Sync

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All - Our apologies but our team had an unexpected conflict come up during this time. Would we be able to reschedule for perhaps tomorrow? Again, our apologies for the last minute change.

Best,
Michele & Bibi

Size Standards - GCBD/ART Sync

When Mon Dec 14, 2020 10:30am – 11am Eastern Time - New York

Where Microsoft Teams Meeting ([map](#))

Who

- Kurtenbach, Daniel J. - organizer
- mchang@ptt.gov - creator
- Arthur Plews
- bhidalgo@ptt.gov
- Carson, Barbara E.
- Spampinato, Francis C.
- Laboy-Bruno, Jorge L.
- Sharma, Khem
- Le, Sam Q.

Microsoft Teams meeting
Join on your computer or mobile app

Click here to join the meeting

Or call in (audio only)

+1 2 [REDACTED] # United States, Washington DC

Phone Conference ID [REDACTED]

Find a local number | Reset PIN

[\[https://www.sba.gov/sites/all/themes/smallbizd7/images/SBA_logo.png\]](https://www.sba.gov/sites/all/themes/smallbizd7/images/SBA_logo.png)

Learn More | Meeting options

From: [Kurtenbach, Daniel J.](#)
To: [Kong, Stephen D.](#)
Subject: Re: The Union
Date: Monday, December 14, 2020 8:56:19 AM

You want me to set it up?

From: Kong, Stephen D. <Stephen.Kong@sba.gov>
Date: Monday, December 14, 2020 at 8:52 AM
To: Michael Chodos <mchodos@jbrpt.org>
Cc: Ellen Kim <eekim@jbrpt.org>, Jonathan Swain <jswain@jbrpt.org>, Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>, Michele Chang <mchang@jbrpt.org>
Subject: RE: The Union

(b) (5)

From: Michael Chodos <mchodos@jbrpt.org>
Sent: Sunday, December 13, 2020 3:04 PM
To: Kong, Stephen D. <Stephen.Kong@sba.gov>
Cc: Ellen Kim <eekim@jbrpt.org>; Jonathan Swain <jswain@jbrpt.org>; Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>; Michele Chang <mchang@jbrpt.org>
Subject: Re: The Union

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Very good, thank you Stephen.

On Sun, Dec 13, 2020 at 2:16 PM Kong, Stephen D. <Stephen.Kong@sba.gov> wrote:

We have reached out to the Union President, Johnnie Green, and hopefully we can set something up for Monday or Tuesday.

From: Michael Chodos <mchodos@jbrpt.org>
Sent: Friday, December 11, 2020 2:35 PM
To: Kong, Stephen D. <Stephen.Kong@sba.gov>
Cc: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>; Jonathan Swain <jswain@jbrpt.org>; Ellen Kim <eekim@jbrpt.org>; Michele Chang <mchang@jbrpt.org>
Subject: Re: The Union

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Thank you Stephen for this update. Please let us know at your earliest convenience (as we're up against some very imminent deadlines).

Best,

Michael

On Fri, Dec 11, 2020 at 1:25 PM Kong, Stephen D. <Stephen.Kong@sba.gov> wrote:

Michael,

We're discussing this issue internally. Also, note that the Union leadership elections are today so we'll see what shakes out from that.

Steve

From: Michael Chodos <mchodos@jbrpt.org>

Sent: Thursday, December 10, 2020 6:34 PM

To: Kong, Stephen D. <Stephen.Kong@sba.gov>; Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>; Jonathan Swain <jswain@jbrpt.org>; Ellen Kim <EEKIM@jbrpt.org>; Michele Chang <mchang@jbrpt.org>

Subject: The Union

CAUTION - The sender of this message is external to the SBA network. Please use care when clicking on links and responding with sensitive information. Send suspicious email to spam@sba.gov.

Dear Stephen and Daniel:

(b) (5) [REDACTED]

[REDACTED]
[REDACTED]
[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]
[REDACTED]

[REDACTED]

(b) (5)

[REDACTED]

Very much looking forward,

All my best,

Michael Chodos

From: [Kurtenbach, Daniel J.](#)
To: [Harriford, Scott](#)
Subject: RE: Transition Documents
Date: Friday, February 19, 2021 8:18:00 AM
Attachments: [PDF.zip](#)

Hi Scott,

Please see the attached zip file. It has all of the transition prep documents we prepared for the transition team. Let me know if you want me to walk you or the new team through some of them.

Best,
Dan

From: Harriford, Scott <Scott.Harriford@sba.gov>
Sent: Thursday, February 18, 2021 6:57 PM
To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Subject: Transition Documents

Dan,

I hope you are doing well. I am working on gathering some documents to share with our new AA's and I wanted to see if you had any transition/ agency background documents that we could share with them. Let me know if it would be helpful to hop on a call to discuss this in more detail.

Thank you for your help,
Scott

Scott Harriford
Small Business Administration
White House Liaison
C: 202.845.4051
E: Scott.Harriford@SBA.GOV

From: [Kurtenbach, Daniel J.](#)
To: [Kong, Stephen D.](#)
Subject: Re: Transition POCs
Date: Tuesday, November 10, 2020 10:59:11 AM

Here are the folks I've been keeping updated:

Mutz, Martina A. <Martina.Mutz@sba.gov>; Rowen, Dolores F. <dolores.rowen@sba.gov>; Contreras, Alejandro C. <alejandro.contreras@sba.gov>; Sutch, Zina B. <Zina.Sutch@sba.gov>; Walker, Gaye T. <Gaye.Walker@sba.gov>; Crean, Sean F. <Sean.Crean@sba.gov>; Carson, Barbara E. <barbara.carson@sba.gov>; Taylor, Sharon A. <sharon.taylor@sba.gov>; Brill, Julie <Julie.Brill@sba.gov>; Biaggi-Ayer, Denise A. <Denise.Biaggi-Ayer@sba.gov>; Wales, Mina A. <Mina.Wales@sba.gov>; Green, Timothy A. <Timothy.Green@sba.gov>; Clark III, Major L. <Major.Clark@sba.gov>; Vallante, Michael A. <Michael.Vallante@sba.gov>; Weaver, Christopher L. <Christopher.Weaver2@sba.gov>; Biles, Brittany W <Brittany.Biles@sba.gov>; Greene, Loretta S. <Loretta.Greene@sba.gov>; Gibson, Patricia M <Patricia.Gibson@sba.gov>; Yousefi, Mandana <mandana.yousefi@sba.gov>; Miller, John A. <John.Miller@sba.gov>; Lisaius, Jennifer F. <Jennifer.Lisaius@sba.gov>; Coffield, Andrew J. <Andrew.Coffield@sba.gov>; Rubio Ritter, Ilene P. <Ilene.Rubio@sba.gov>; Bossie, Jason <Jason.Bossie@sba.gov>; Nicholson, James R. <James.Nicholson@sba.gov>; Bennett, Patty A. (Temp) <Patty.Bennett@sba.gov>; West, Jacqueline B. <Jacqueline.West@sba.gov>; Cheeks, Raymond A. <Raymond.Cheeks@sba.gov>; Dickens, Valencia D. <Valencia.Dickens@sba.gov>; DeFosset III, Donald <Donald.DeFossetIII@sba.gov>; Morris, Thomas G. <thomas.morris@sba.gov>; Levine, Nina D. <nina.levine@sba.gov>; Fishman, David A. <david.fishman@sba.gov>; Hunter, Karen L. <Karen.Hunter@sba.gov>; Cantlon, James D. <James.Cantlon@sba.gov>; Westbrook, Jonathon (Temp) <Jonathon.Westbrook@sba.gov>; Hernandez, Elias <elias.hernandez@sba.gov>; Gray, Christopher S. <Christopher.Gray@sba.gov>; Hershey, Michael S <Michael.Hershey@sba.gov>; Nelson, Nicole M. <Nicole.Nelson@sba.gov>; Kong, Stephen D. <Stephen.Kong@sba.gov>; Perriello, Tami L. <Tami.Perriello@sba.gov>; Stubblefield, Larry <Larry.Stubblefield@sba.gov>; Billimoria, Jimmy F. (Jim) <jim.billimoria@sba.gov>; Manger, William M. <William.Manger@sba.gov>; Kupfer, Jeffrey F. <Jeffrey.Kupfer@sba.gov>; Ford, Delorice Price <delorice.ford@sba.gov>; Bluestein, Keith A. <Keith.Bluestein@sba.gov>; Monchek, Rafaela <Rafaela.Monchek@sba.gov>; Spampinato, Francis C. <Francis.Spampinato@sba.gov>; Rivera, James E. <james.rivera@sba.gov>; Gutierrez, Allen M <Allen.Gutierrez@sba.gov>; Richards, Amber G. <Amber.Richards@sba.gov>

Best,
Dan

From: Kong, Stephen D. <Stephen.Kong@sba.gov>
Date: Tuesday, November 10, 2020 at 10:43 AM
To: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Subject: Re: Transition POCs

Can you send me a list of the POCs?

Get [Outlook for iOS](#)

From: Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Sent: Tuesday, November 10, 2020 10:41:09 AM
To: Kong, Stephen D. <Stephen.Kong@sba.gov>

Subject: Transition POCs

Should we send out a general “no action needed, wait for further guidance” note to the transition POCs in the absence of other direction regarding ascertainment? Mandana suggested it. I’m fine either way.

Dan

From: [Kurtenbach, Daniel J.](#)
To: [Seaborn, Dianna L.](#); [Manger, William M.](#); [Miller, John A.](#); [Streich, Susan E.](#)
Cc: [Wade, John M.](#); [Kong, Stephen D.](#)
Subject: Re: Transition Team meeting on New Lenders
Date: Wednesday, December 9, 2020 5:08:23 PM

Added, thanks. Please let me know tonight if any issues.

Best,
Dan

From: Seaborn, Dianna L. <Dianna.Seaborn@sba.gov>
Date: Wednesday, December 9, 2020 at 2:32 PM
To: Manger, William M. <William.Manger@sba.gov>, Miller, John A. <John.Miller@sba.gov>, Streich, Susan E. <Susan.Streich@sba.gov>, Kurtenbach, Daniel J. <Daniel.Kurtenbach@sba.gov>
Cc: Wade, John M. <john.wade@sba.gov>
Subject: Transition Team meeting on New Lenders

Hi team. (b) (5)

. Thank you. D.

Dianna L. Seaborn, Director
Office Financial Assistance
US Small Business Administration
409 3rd Street, SW
Washington, DC 20416
202-205-3645
202-594-6999
dianna.seaborn@sba.gov



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From: [Kurtenbach, Daniel J.](#)
To: [Kong, Stephen D.](#)
Subject: Transition POCs
Date: Tuesday, November 10, 2020 10:41:10 AM

Should we send out a general “no action needed, wait for further guidance” note to the transition POCs in the absence of other direction regarding ascertainment? Mandana suggested it. I’m fine either way.

Dan