

Defense Logistics Agency Instruction



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J-5

Enterprise Organizational Alignment (EOA)

REFERENCE: This Instruction reformats and replaces DLA One Book Process Chapter, Enterprise Organizational Alignment (EOA), December 10, 2008. [Enclosure 1](#) includes additional references.

1. **PURPOSE:** DLA has undertaken a number of transformational initiatives in its history through business process reengineering, workforce development, technology modernization, and organizational change. However, no single initiative is transformational by itself; transformation and long-term strategies need to be aligned if target results and expectations are to be achieved. The Agency's Senior Leaders recognized the need for a standardized enterprise-wide EOA process to manage organizational change.

EOA provides a standardized process to effect End-to-End (E2E) organizational change. EOA E2E is the process by which proposed organizational change is identified, documented, coordinated, submitted, approved, authenticated GO, and implemented through the applicable enterprise systems to include personnel systems.

The EOA process supports the Agency's vision of "DLA...Supporting Mission Success" by integrating the most critical elements of the business (e.g., people, strategy, customers, processes, systems, and funding) to work in concert to achieve the desired effects.

Metrics: J-5 will document the time it takes to complete the major phases of the E2E process. The data will be used in the development of EOA metrics, goals, and expectations. EOA metrics will prove valuable for continuous process improvement.

The output of the EOA process is the implementation of all actions of an approved organizational alignment General Order.

This instruction establishes the policies, processes, and procedures necessary to the effective, efficient, and economical conduct of DLA Organizational Alignment (OA) change. EOA is the DLA policy regarding organizational alignment change, the principles to be followed in the design and implementation of organizational alignment change, the processes for securing approval of change proposals, and the process of executing such change. Organizational Alignment (OA) change may encompass changes to organizational structure, mission and functions, organizational codes, and financial hierarchy.

2. **APPLICABILITY:** This instruction applies to Headquarters (HQ) DLA and Field Activities (FA). The EOA process owner is DLA Enterprise Transformation, J-5.

3. **POLICY:** Organizational alignment change, to include establishment, disestablishments, re-designations and/or transfers, of HQ DLA and FA mission areas must be consistently applied and documented in a GO, Missions and Functions Statement, and Organizational Charts.

An organization conducting a competitive sourcing competition under the Office of Management and Budget Circular A-76 will determine if an acquisition decision by the Source Selection Authority triggers an organizational alignment change as defined in this policy. If so, the proponent for the organization affected will follow the procedures of this policy to formalize the acquisition decision and process the GO for signature.

The Governance Process for the approval of organizational alignment proposals consists of three sequential forums: EOA Board (EOAB), Alignment Group (AG), and Executive Board (EB). The EOAB is the first forum in the Governance process and all proposals will be reviewed by the EOAB for approval. The EOAB normally meets on a monthly basis. Approval must be unanimous before a proposal can proceed to the GO authentication phase (reference paragraph 4.6.6.1., Approval of a Proposal). The AG will review a proposal only if the EOAB cannot reach a unanimous decision and the proponent elects to elevate the proposal to the AG for consideration. Same applies for elevation to the EB.

EOAB members will be appointed by their respective Commander/Director in writing to the Chair of the EOAB. EOAB membership will consist of J-1, J-3/4, J-5 (Chair) J-6, J-7, J-8, J-9, DES, DG, DDC, DESC, DRMS, DSCC, DSCR, and DSCP. Commanders/Directors will notify the EOAB Chair of any changes in EOAB membership. It is highly encouraged that each EOAB member has a designated alternate to provide for the timely management of the EOA process in his/her absence.

With the exception of General Orders supporting an A-76 decision, actions to implement an approved proposal can only become effective after the GO has been signed. Transition actions resulting from A-76 competitive sourcing (Source Selection Authority) decisions will continue pending GO signature.

4. RESPONSIBILITIES: Refer to [Enclosure 2](#).
5. PROCEDURES: Refer to [Enclosure 3](#). [Enclosure 4](#) contains additional information and definitions.
6. EFFECTIVE DATE: December 10, 2008 (retained from reformatted publication)

Director, DLA Enterprise Support

4 Enclosures

- Enclosure 1 – References
- Enclosure 2 – Responsibilities
- Enclosure 3 – Procedures
- Enclosure 4 – Additional Information/Definitions

Enclosure 1 References

1. [DOD Directive 5105.22, Defense Logistics Agency \(DLA\)](#).
2. [5 U.S.C. 552 \(a\)](#) outlines public information: Agency rules, opinions, orders, records, and proceedings, and its availability to the public.
3. [DLA Strategic Plan](#).
4. [Master Labor Agreement](#).
5. [OA Tenets](#).
6. DLA Instruction, Information Technology Requirements Analysis.
7. DLA Regulation 1000.22, Environmental Considerations in DLA Actions in the United States.
8. DLA Regulation 1410.1, Reduction in Force, Furlough, and Transfer of Responsibilities.
9. [OMB Circular A-76, Performance of Commercial Activities](#).
10. [Base Realignment and Closure 2005](#).
11. The OA proposal package serves as the record of approved organizational changes and the rationale for the approved changes.
 - 11.1. Draft GO will include reference to Public Laws, Federal regulations, DOD and DLA directives and regulations, and all applicable governing directives and policies that have or may have impact on the proposed change.
 - 11.2. The authoritative system for organization codes is DCPDS. Proponents shall work with J-1 and J-8 to determine organization code availability and assignment.
12. The DLA Correspondence Manual guidance is used in the preparation of GO package documentation.

Enclosure 2 Process & Responsibilities

1. OA change can be initiated at any level of the Agency resulting from change due to Congressional or DOD mandates, new DLA mission, mission shifts, transfer of function, reengineered business processes, system enhancements, alignment with customer needs, BRAC, A-76, and other transformational initiatives.

2. The organization affected by the change (the Proponent) will determine the need for an OA proposal based on the criteria below. If any of these criteria are met, the proponent will develop a proposal IAW this One Book Chapter. The proponent is encouraged to review Section 3 of the Proposal Coordination Checklist for helpful hints before they begin developing the proposal. Organizational alignment proposals can be submitted at anytime as defined by the “de-linking” decision. The de-linking decision allows proposals with personnel system changes to commence immediately after GO signage, however, any Enterprise Business Systems (EBS) changes will be held for the next scheduled EBS release.

2.1. Impact on Enterprise Business Systems (EBS); [Business Systems Modernization \(BSM\) Tenets](#); Enterprise Financial Hierarchy; NSN, DODAAC, and Workflow assignments; or funding derivation rules (e.g., creation of new job roles; changes to cost centers, profit centers, or funds center structure).

2.2. New, enhanced, or revised DLA missions, initiatives, or strategies.

2.3. Geographic moves and consolidations.

2.4. Mergers with other Defense or Federal agencies.

2.5. Modernization or reengineered functions.

2.6. Adaptation, consolidation, and/or installation of information technology (IT) capabilities impacting existing functional/business procedures.

3. The Submittal Authority (Commander, Director) will endorse the OA proposal and submit the proposal to the EOAB Chair, the Deputy Director of DLA Enterprise Transformation (J-5), and the J-5 EOA Action Officer. The Submittal Authority endorses the proposal by electronically signing the Proposal Coordination Checklist.

4. An organizational alignment proposal package will consist of the documents identified in this section. The proponent will determine which of these documents apply to the proposal. Each document identifies a template point of contact (POC) if a proponent requires assistance with completing the document.

5. After review of an OA proposal for coordination, it is the responsibility of each EOAB member to coordinate the OA proposal with the applicable template POC(s) in their respective organization (e.g., J-3/4 coordination on OA proposals containing the NSN Mapping document will include coordination by the NSN Mapping template owner in J-3/4).

5.1. [Proposal Coordination Checklist Template \(J-5\)](#)

5.2. [General Order Template \(J-5\)](#)

5.3. [Missions and Functions Template \(J-5\)](#)

5.4. [Proposed Organizational Chart Template \(J-5\)](#)

5.5. [Financial Hierarchy Matrix Template \(J-8\)](#)

5.6. [National Stock Number \(NSN\) Mapping Template \(J-3/4\)](#)

5.7. [Department of Defense Activity Address Code \(DODAAC\) Mapping Template \(J-3/4\)](#)

5.8. [Comments Resolution Matrix \(J-5\)](#)

5.9. [OA Personnel Change Template \(J-5\)](#) IMPORTANT NOTICE: the OA Personnel Change Template contains, when populated, sensitive personnel information therefore the template IS NOT included as attachments to an OA proposal, nor submitted to the EOAB for review. See your DHRC/J-8/J-5 representatives if you have any questions or need further clarification.

5.10. The following standardized organizational and position titles have been approved at the levels indicated for uniformity throughout DLA and should be considered when drafting a proposed organizational change. The organizational subdivisions shown below are the maximum rather than the minimum structure authorized.

ORGANIZATION UNIT TITLE AND SUBDIVISION	ORGANIZATION TITLE FOR LEADERSHIP POSITIONS
HEADQUARTERS COMMAND LEVEL	
Office of the Director	Director Vice Director
HEADQUARTERS SPECIAL STAFF LEVEL	
Office General Counsel Chaplain Division Branch Section/Team (non-supervisory) Sub-Section (non-supervisory)/Team	Staff Director General Counsel Chaplain Chief Chief Team Leader Team Leader
HQ J-CODE AND DES STAFF OFFICE LEVEL	
Directorate Directorate, Financial Operations Staff Office Office/Division Branch Section/Team (non-supervisory) Sub-Section (non-supervisory) Team	Director Comptroller Deputy Director Deputy Comptroller Executive Director (SES position) or Staff Director Chief Chief Team Leader Team Leader
FA COMMAND LEVEL	
Office of the Commander/Director Administrator	Commander (military) Director/Administrator (if incumbent is civilian) Deputy
FA STAFF LEVEL	
Directorate Office/Division Branch Section/Team (non-supervisory) Sub-Section (non-supervisory) Team	Director/Administrator Chief Chief Team Leader Team Leader

6. E2E refers to the processes by which an organizational alignment proposal is identified, documented, coordinated, submitted, approved by EOA governance process, approved by a GO, and effected through

applicable systems and personnel change. The processes identified in this Section are the major steps in the E2E EOA process.

6.1. Identify Requirement for OA.

6.2. Document Requirement.

6.3. Coordinate Requirement.

6.4. Review by Submittal Authority and Submission.

6.5. Review by EOAB Chair (J-5).

6.6. Review by first step in the Governance process, the EOAB.

6.7. Review by Alignment Group and/or Executive Board, if necessary.

6.8. Communicate Decision.

6.9. Create System Change Request (SCR).

6.10. Initiate Organizational Change.

6.11. Process General Order.

6.12. Conduct General Counsel and Union Coordination.

6.13. Confirm Effective Date and sign General Order.

6.14. Effect Organizational Alignment.

7. Listed below are some, but not all, of the EBS and non-EBS programs, applications, and systems that can be affected by an OA change.

7.1. EBS Changes: a System Change Request (SCR) is used to initiate change in EBS using the EBS Requirements Tracking Tool website: Systems, Applications, and Products (SAP); DLA Pre-Award Contracting System (DPACS); Customer Support Management (CSM); Product Data Management Initiative (PDMI); Enterprise Procurement (eProcurement); and Distribution Standard System (DSS).

7.2. Non-EBS Changes: Automated Time and Attendance Production System (ATAAPS); Defense Civilian Personnel Data System (DCPDS); Military Online Personnel System (MOPS); Defense Civilian Payroll System (DCPS); Defense Travel System (DTS); Travel Card Program; Mass Transit Program; and Performance Rating Systems (NSPS/GS).

Enclosure 3

Sub Processes Descriptions & Responsibilities

1. Identify Requirement for OA. Requirements can be initiated at any level of the organization resulting from changes in Congressional or DOD mandates, new DLA mission, mission shifts, transfer of function, reengineered business processes, system enhancements, alignment with customer needs, BRAC, A-76, and other transformational initiatives. The proponent (the gaining organization) will document the requirement and initiate the OA proposal. Proponents must consult J-1, J-6, and J-8 in the early stages of concept development. The proponent is responsible for coordinating NSPS pay pool issues or impacts with their organization's Pay Pool Manager.

1.1. DLA Human Resources Center (DHRC, J-1) representatives must be included in the initial planning stages of the proposed OA. DHRC representatives provide subject matter expertise in relation to supportability of positions, qualifications of employees, position management advisory services, identification and advice regarding organizational code structures. DHRC will have 14 calendar days to complete their review. Along with DHRC review, the proponent's Pay Pool Manager should be contacted at the initial stages of planned organizational alignments to evaluate potential impact to employees under the National Security Personnel System (NSPS).

1.2. DLA Information Operations (J-6) representatives should be included in the process from the initial planning stages of proposed OA/realignments. J-6 will review general orders (J-65) and proposed system change requests (J-642) for potential impacts to the enterprise, as required.

1.3. DLA Financial Operations (J-8) representatives and site comptrollers must be included in the initial planning stages of the proposed OA. J-8 representatives/site comptrollers provide information on potential impacts to the financial hierarchy and the resulting impacts to the Enterprise, as well as advice on the best methods for capturing required financial information (costs, profits, funding, etc.). Getting the benefit of this information in the forefront of a proposal and keeping J-8 representative(s) involved throughout the process ensures efficient processing and proper EBS financial hierarchy adjustments after approval.

2. Document Requirement. The proponent develops the OA proposal in accordance with this DLA One Book Chapter and the applicable supporting documentation: Proposal Coordination Checklist; Draft General Order; Missions and Functions Statement; Proposed Organizational Charts; Financial Hierarchy matrix; OA Personnel Change template; Comments Resolution Matrix (CRM); NSN Mapping template; and Department of Defense Activity Address Code (DODAAC) Mapping template.

2.1. OA Personnel Change Template: The proponent should begin by working with DHRC to develop the OA Personnel Change Template. Due to privacy issues, the OA Personnel Change Template is not submitted with an OA proposal, nor are they reviewed by the EOAB. The proponent also should work with DHRC to determine the correct format for title, series, and grade information based on the size and complexity of the change, per the Organizational Chart template instruction sheet.

3. Coordinate Requirement. The proponent will send the draft OA proposal package to J-5 for posting to the EOA Repository. J-5 will notify the EOAB membership that an OA proposal has been posted to the EOA Repository for their coordination and comment. The proponent is responsible for documenting the EOAB coordination on the Proposal Coordination Checklist and, all EOAB comments on the Comments Resolution Matrix. While this single documented coordination process streamlines the EOA coordination process and serves as the single official baseline for the authentication of the GO for approval, it does not negate the proponent's option to have an internal (local) coordination process with local organizations and other supply chains or business areas, as required.

3.1. Single Coordination Process: EOAB members will have 14 calendar days (10 working days) from the date of the email to coordinate and comment back to the proponent. BRAC proposals may require fewer than 14 days if expeditious handling is required. EOAB members will coordinate OA proposals internally within their respective organization to include the EOA template owner(s) in their organization. The EOAB

members are responsible for providing a consolidated list of their organizations comments to the proponent using the Comment Resolution Matrix (CRM).

3.2. The proponent is responsible for consolidating all comments from the EOAB members on a single CRM that includes the action taken by the proponent for each comment. The proponent will submit the CRM as a part of their OA proposal package. If a proponent is unsuccessful in resolving comments during the coordination process, the proponent may request the EOAB Chair add their proposal to the EOAB agenda for further discussion and resolution.

4. Review by Submittal Authority and Submission. The Submittal Authority (Commander/Director) approves the OA proposal by electronically signing the Proposal Coordination Checklist and submitting the OA package to J-5. J-5 must receive proposals a minimum of 21 calendar days (15 working days) prior to the next EOAB meeting to allow sufficient time for EOAB Chair review (five working days) and EOAB members' review (10 working days) which includes acquiring their Commander/Director approval. Effective FY08, "de-linking" is approved which allows for proposals to be submitted at any time of the year vice semi-annually (1 October and 1 April). De-linking allows for personnel systems changes to commence however, any associated Enterprise Business Systems (EBS) changes would be held until the OA SCR is prioritized and resourced. The Submittal Authority's EOAB member or alternate EOAB member submits the approved OA proposal package electronically to the J-5 (EOAB Chair) and the J-5 EOA Action Officer.

4.1. The Defense National Stockpile Center (DNSC) will submit proposals through J-7.

4.2. The Director's Staff Group (D, DB, DV, DX, DP, DL, DO, DH) will submit proposals through J-5.

4.3. The Defense Logistics Information Services (DLIS) and the Document Automation Production Service (DAPS) will submit proposals through J-6.

5. Review by EOAB Chair. The EOAB Chair will review OA proposals and supporting documentation for accuracy, completeness, and adherence to the policies in this One Book Chapter. J-5 may include other J-codes and Field Activities, as deemed appropriate, in this review. Incomplete packages will be returned to the proponent and/or the Submittal Authority.

5.1. EOAB Notification: J-5 is responsible for providing the EOAB members the final proposal package at least 10 working days prior to an EOAB to obtain their Commander/Director support and concurrence. J-5 will notify the EOAB membership that the proposal has been posted to the EOA Repository for review.

5.2. EOAB Notification, Electronic Voting: If expediency and mission execution requires expeditious processing and approval of an OA proposal (e.g., BRAC, A-76 proposal), J-5 will post the proposal to the EOA Repository and coordinate approval via electronic voting. If the EOAB approval is unanimous, J-5 will commence with the GO phase and inform the EOAB members.

6. Review by EOAB. The EOAB is the first step in the Governance process and all OA proposals will be reviewed by the EOAB. EOAB representatives should have a broad working knowledge of the Enterprise, their respective areas of responsibility, and have the authority to act and vote on behalf of their Commander/Director. EOAB members are the EOA Champions for their respective organization and will be the leaders for EOA. EOAB members will coordinate OA proposals internally within their respective organization, to include the template owner(s) in their organization, and provide comments via the CRM to the proponent. It is the responsibility of EOAB members to coordinate their position with their Commander/Director prior to an EOAB and be prepared to vote on proposals during the EOAB. The approval of an OA proposal by an EOAB member constitutes full concurrence of their Commander/Director. A representative of the Submittal Authority or the Submittal Authority's EOAB member will present their OA proposal to the EOAB and respond to questions.

6.1. Approval of a Proposal: The EOAB approval of a proposal must be a unanimous decision before J-5 can begin the GO authentication phase. If EOAB approval is not unanimous, a proposal will not be considered approved and the proponent of the proposal will have two options: accept the EOAB decision

or recommendation, or submit the proposal to the next level of the Governance process for further review and consideration for approval.

6.2. Below is a brief description of the role of each organization represented by the EOAB:

6.2.1. J-1 is responsible for providing guidance and taking action on any matters related to human resource (HR) management (e.g., managing updates to HR systems; DCPDS), position management/reporting chain alignment, staffing, classification, job transition, training, employee qualifications, addressing of NSPS related issues, union coordination and labor relations. J-1 continues to provide advisory services throughout the entire process, to include ensuring that documentation is built into the personnel system, as appropriate, to accommodate the movement of personnel once an organization alignment has been approved.

6.2.2. J-3/4 reviews OA proposals for compliance with Supply Chain Logistics, Customer Support Management (CSM), forward presence, and BRAC organizing principles and process management, to include NSN and DODAAC assignments.

6.2.3. J-5 has three EOA roles: EOA process owner, EOAB Chair, and Enterprise Transformation Directorate.

6.2.3.1. As EOA process owner, J-5 is responsible for developing EOA policy, managing and executing EOA processes, and championing EOA for the enterprise.

6.2.3.2. As EOAB Chair, J-5 executes EOA policy. J-5 leads and manages the EOAB process, serves as the recipient for all OA proposals, schedules the EOAB monthly or as required, disseminates OA proposals to the EOAB members prior to an EOAB, establishes the EOAB agenda, provides EOAB meeting minutes, communicates in writing the decisions of the Governance Structure (EOAB, PG, or CB) to the EOAB members, and processes the General Order for signature. J-5 will maintain an online repository to include approved documents (e.g., General Orders and Organizational charts). J-5 will track OA proposals through signature and report status to the EOAB.

6.2.3.3. As the Directorate of Enterprise Transformation, J-5 reviews proposals for impacts to the Strategic Management System (Strategic Plan, Balanced Scorecard, and Transformation Roadmap), Strategic Communications, and Continuous Process Improvement.

6.2.4. J-6 reviews OA proposals and advises of any impact on existing operational or sustainment capabilities or other functional responsibilities of the J-6 Enterprise. J-6 works in concert with system functional proponent(s) to provide a high order of magnitude assessment of any required IT systems or infrastructure revisions needed to implement the OA proposal. J-6 provides cost and schedule estimates in response to the financial community requirement to execute proposed OA changes in the SAP Financial Hierarchy. DLA Information Operations, Sustainment (J-642), is responsible for implementing system changes including EBS.

6.2.5. J-7 reviews OA proposals for compliance with procurement organizing principles and process management, including Workflow and compliance with DOD Instruction 5000.66, Operation of the Defense Acquisition, Technology, and Logistics Workforce Education, Training, and Career Development Program. J-7 validates whether or not the first level performance evaluations of contracting officers have been performed by individuals who are Defense Acquisition Work Force Improvement Act (DAWIA)-certified in contracting at a level no lower than that of the individual being evaluated. Non-contracting officers in the 1102 series should be provided an opportunity to have their performance appraisals reviewed by an individual who is DAWIA certified in the same Acquisition, Technology, and Logistics (AT&L) career field at a level no lower than that of the individual being evaluated.

6.2.6. J-8 reviews realignments to determine impact on the financial hierarchy and EBS organizations. J-8 identifies financial hierarchy change requirements to the EBS to ensure cost and schedule estimates are developed and change requirements are incorporated with other requirements. J-8 makes changes to the Operational Accounting system to include completion of any required finance table build activities

for approved organization changes. J-8 works in concert with J-1 to build payroll records and make changes in Defense Civilian Pay System (DCPS). J-8 obtains Time and Attendance (T&A) requirements (list of employee/certifiers) to build appropriate records/changes into T&A system. J-8 chairs and supports the Program Business Review Group (PBRG) process. J-8 reviews budgetary or full-time equivalent (FTE) increases/decreases for impact on Agency operations; reviews business cases, economic analyses, and other supporting financial documentation; determines funding types; makes recommendations; documents recommendations; and briefs the PBRG, Vice Director, and Director. J-8 is responsible for providing financial management assistance and oversight through cost allocation and budgeting.

6.2.7. J-9 reviews OA proposals for impact upon the functions and locations of the Joint Reserve Forces assigned to DLA activities.

6.2.8. Directorate of Enterprise Support (DES-B) reviews OA proposals for impact on enterprise-wide agency policy, program, and world-wide operational support in Environment, Safety and Occupational Health; Installation Management; Public Safety; Management Internal Controls; Defense Travel System (DTS); Travel card and Mass Transit Program; and Morale, Welfare and Recreation (MWR) services.

6.2.9. DG reviews OA proposals for legal implications and for impact on DG programs, i.e., Business Integrity and Procurement Fraud, FOIA/Privacy Act (at headquarters DLA only), ethics, legislative proposals, and litigation.

6.2.10. The Field Activities will review OA proposals for general awareness and applicability, opportunities for synergy with ongoing or planned initiatives, and supply chain impacts.

7. Review by the Partners Group and Corporate Board. If the EOAB does not approve an OA proposal, the proponent may choose to refer the proposal to the next level of the Governance process, the Alignment Group (AG). If the AG does not approve the OA proposal, the proponent may choose to refer the proposal to the next higher level of the Governance process, the Executive Board, for review and approval.

8. Communicate the Decision. The EOAB Chair provides written documentation of the decision, whether approval or disapproval, by the governance process. If the decision is an approved proposal, the OA proposal documentation package will serve as the official baseline for the General Order authentication process.

8.1. J-5 will post the approved OA proposal package to the EOA repository.

9. Initiate OA for EBS System Change. After an OA proposal with EBS changes has been approved by the governance process, J-5 will inform J-8 to create the Systems Change Request (SCR). J-5 will forward the OA proposal to J-8 at the same time J-5 provides General Counsel and Labor and Employee Relations (J-13) the approved OA proposal for their concurrent coordination (ref para 4.6.12). The tracking tool automates the SCR process including, but not limited to, Process Owner approval, Preliminary Cost Estimate, and Status Tracking. J-8, as the FI process owner for OA SCRs, will sponsor all SCRs through completion with any assistance, as required, from the proponent. The SCR is the official record for metrics to measure how long it takes to change the EBS systems.

9.1. After development by the FI Process Owner (J-8), the SCR will be routed to J-6C for Preliminary Cost Estimate (PCE). The PCE process to develop the Rough Order of Magnitude (ROM) should take no longer than 21 working days. Based on the PCE, J-8 will prioritize and add the SCR to the FI Functional Priority List (FPL). J-6C will complete the SCR based on priority and implement in appropriate EBS system release.

10. Initiate OA for Non-EBS System Changes. Once the OA proposal has been approved by the governance structure, the proponent may commence to prepare for the implementation of the non-EBS changes. Proponents will use the Non-EBS System Checklist along with the OA Personnel Change template to begin implementation. These changes may include preparation for documenting updates

(Web sites, communications, presentations, and training materials, etc.), and preparation for realignment of personnel, such as ordering signage and ordering business cards. Realignment of personnel resources and system changes cannot be effected until the General Order is authenticated and signed. The proponent will keep the EOAB informed monthly of the status of their non-EBS systems changes through full implementation.

11. Process General Order. J-5 finalizes GO package per the DLA Correspondence Guide.

12. Conduct Simultaneous DG and Union Coordination. J-5 performs a concurrent coordination with General Counsel and Labor and Employee Relations (J-13). If bargaining unit employees are affected, J-13 advises J-5 that a bargaining obligation exists and requests a 30 day extension for coordination with the union, and, in turn J-5 informs the proponent of the labor obligation. Coordination with union representatives and DG must be accomplished prior to implementation of organizational changes. J-5 will coordinate with the proponent to address any questions or issues.

12.1. If at any point a Demand to Bargain is submitted by the union, bargaining is limited to the procedures and appropriate arrangements for employees affected by the reorganization and not over the reorganization itself. If changes are limited to a local site, it is the responsibility of the proponent and local union representative to solidify the conditions of any bargaining agreement. If changes are agency-wide, J-13 represents the agency on behalf of the proponent.

13. Confirm Effective Date and Sign General Order. The GO package is reviewed by the designated signatory/approval authority. An authorized delegate may approve GOs on behalf of the DLA Director. This process is in accordance with the delegation of authority to sign GOs given by the DLA Director to the respective signatory authority. J-5 coordinates with signatory/approval authority to address any questions or issues. J-5 or the proponent will make any final updates to the GO package, if required.

J-5 will coordinate with J-1 and applicable EOAB members to confirm the effective date for the GO. Implementation of activities required to effect the organization change cannot occur until the GO is signed. J-5 communicates the confirmed GO effective date to all EOAB members responsible for implementing organization changes.

13.1. J-5 notifies the EOAB members that the GO has been authenticated and signed.

13.1.1. J-5 is responsible for updating and posting the baseline Organization Charts, including EBS-controlled documents, to the EOA repository.

13.1.2. J-5 is responsible for publishing the signed GO. J-5 will update the EOA repository with the signed GO and the Missions and Functions document.

14. Effect Organizational Change. The Proponent is responsible for communicating the approved organizational change with all organizations responsible for implementing such change (e.g., J-1, J-6, J-8), whether the change is EBS and/or non-EBS change, and also updating J-5 and the EOAB when the actions are complete. Proponents are requested to use the EOA Non-EBS System Checklist and OA One Personnel Change Template to effect their organizational alignment proposal of Non EBS changes. The EOA Non-EBS System Checklist serves as the official record for metrics to support cycle time associated with Non-EBS Systems.

14.1. J-1 is responsible for providing guidance and taking action, as appropriate, on any matters related to Human Resource (HR) management.

14.2. J-6 (J-642) is responsible for implementing system changes including EBS.

14.3. J-8 is responsible for providing financial management assistance and oversight through cost allocation and budgeting.

14.4. The Proponent or their respective EOAB member will update the EOAB monthly on the status of all actions to implement approved General Orders until such time all actions have been successfully accomplished.

Enclosure 4
Additional Information/Definitions

1. **Organizational Alignment (OA)** is a business discipline that links strategy with people, processes, and technology in a mutually supportive system focused on achieving business results and accomplishing a shared vision.
2. **Enterprise Organizational Alignment (EOA)** is the process where the most critical elements of a business (e.g., people, strategy, customers, processes, systems, and funding) are integrated to work in concert to achieve the desired effects.
3. **Submittal Authority** refers to Commanders and Directors of an organization.
4. **Proponent** refers to the gaining organization within DLA. The proponent is the office which prepares the OA proposal in accordance with this One Book Chapter.
5. **EOA End to End (E2E)** refers to the entire process in which an organizational alignment proposal is identified, documented, submitted, approved by the EOA governance process, authenticated by the GO process, and effected through all applicable systems and personnel changes.
6. **Business Systems Modernization (BSM) organizations** refers to customer operations, supplier operations, operations accounting, process management, and detachments (organization code beginning Q, F, N, and B).
7. **Organizational Change** refers to changes to the organization structure, organization code, and/or activity code to include establishments, disestablishments, redesignations, and/or transfers of headquarters DLA mission areas and DLA field activities. It does not necessarily include movement of personnel within the approved structure. Movement of personnel within an approved organization structure can be construed as an organizational change when the mission performed by the employees is moved from one organizational entity to another.
8. **Establish** organization change refers to the creation of a new organization unit to include office symbol and mission.
9. **Disestablish** organization change refers to the deletion of an existing organization unit. The related office symbol may be deleted or redesignated. The related mission may be deleted or transferred to another approved organizational entity.
10. **Re-designate** organization change refers to a change to the name of an organization. Organizational codes are not re-designated.
11. **Transfer of Mission and/or Function** organization change refers to an adjustment of missions, functions, personnel, and resources from one organizational code to another. A transfer can occur in conjunction with a disestablishment or establishment of an organization.
12. **Financial Hierarchy** is the interdependent relationship of objects in EBS defined by a numerical schema, which identifies the organization, site, location, business area, supply chain, function, and fund type in which financial transactions are posted. The Hierarchy facilitates the controlling of funds, ease of workflow, and reporting of financial and Key Performance Indicator (KPI) information used in business decisions.
13. **Enterprise Business System (EBS)** refers to any enterprise system, for example Business Systems Modernization, Customer Relationship Management, Product Data Management Initiative, and eProcurement. Organization change may have Enterprise impact where the organizations utilized EBS, such as customer operations, supplier operations, process management, detachments (organization codes beginning Q, F, N, and B), and organizations operating under Operational Accounting.

14. **General Order (GO)** is a permanent instruction issued in Orders Format which usually concerns matters of policy or administration (as opposed to Special Orders, affecting individuals or small groups). Within DLA, GOs serve as the formal record of all organization changes.

15. **Missions and Functions Statement** describes the clear and succinct representation of the organization's purpose for existence and the requisite activities performed by the organization.

16. **Organization Chart** is a diagram depicting how elements within an organization (directorates, divisions, branches, etc.) are related to one another along lines of authority.

17. **De-linking.** Up until late Fiscal Year 2007, OA proposals were submitted semi-annually to align with the semi-annual systems change cycle (1 October and 1 May). In late FY '07 a DSCP initiative known as "de-linking" was approved by the Transformation Executive Board (TEB) which allowed for OA proposals to be submitted at any time of the year. After a GO has been approved and signed, "de-linking" allowed for personnel systems changes to commence however any associated EBS changes will be held until the next scheduled release.

18. **EOA Repository.** The EOA repository is an online repository in eWorkplace to store approved EOA documents (e.g., General Orders, Organizational Charts, Missions and Functions Statements), reference materials (e.g., EOA One Book), EOA master templates, EOAB minutes, and EOA tracking documents.