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Organizational Change Checklist for Organizational Name Changes

An Additional Help for ADS 102

New Edition Date: 06/27/2017
Responsible Office: HCTM/PPSM/WPP
File Name: 102sac_062717

ORG NAME: _____

Please refer to [ADS 102 section 102.3.2 a.i.](#)

Organizational Name Change Request Checklist

Purpose - To change the name of an organization without any change in the way a function is structured (or without any movement of employees or positions), the requesting B/IO or overseas Operating Unit may modify its name to better reflect relevant best practices and/or to clarify its purpose or function.

Actions/steps - The requesting B/IO or OOU will contact WPP to set up an initial consultation to discuss the concept and the package preparation. The B/IO or OOU will provide the package to WPP for a courtesy review. Once WPP reviews the package, the B/IO or OOU is responsible for sending the concept package to socialize and obtain the appropriate clearances via email from MPBP, GC, LPA, and the USAID FO. Once those clearances have been obtained, the B/IO, OOU will share those with WPP. Only then should they submit the final package to HCTM/PPSM/WPP for review, approval, and implementation. For more detailed information, see the step-by-step guide from WPP.

Required documents:

- Approval Memo from and signed by the requesting B/IO's AA or overseas Operating Unit's Mission Director addressed to the CHCO. Overseas units must clear the organizational change package through their respective Regional Bureau before submitting to HCTM.
 - a. Include the current and proposed organizational unit name, as well as the proposed abbreviated unit 3 or 4-letter code. The existing unit name will come from HR Connect, NFC. Include changes for both the losing and gaining units.

Existing/current – Policy, Planning, and Information Management. Workforce Policy & Planning (PPIM/WPP). New – Policy, Planning, and Systems Management. Workforce Policy & Planning (PPSM/WPP).
- Current functional statement. This is found in [ADS 101](#).
- Proposed functional statement. Please include any approved Agency Coordinators in this proposal. Recommend using the existing from [ADS 101](#) and use track changes to show what needs to be altered.
- Required email socialization with confirmation from the following groups:
 - a. The package must be socialized with LPA, GC, and the USAID Front Office. Ensure the responses/clearances from those groups are included in the package.
- Other/appropriate clearances – M Bureau (new position request, physical space and IT requirements), BRM (Program funds), PPL, LPA (Congressional Notification), Approval from Department of State and the appropriate Ambassador/Chief of Mission (NSDD-38), White House (AD positions must have approval letter).

HCTM/PPSM/WPP POCs:

Kevin Mitchell (202) 712-0569

Suleiman Sultanali (202) 712-1107

Krista Hurlburt (202) 712-4520

- Once the appropriate clearances/socialization have occurred, the CHCO reviews the entire package and signs off on the Action Memo once it has been vetted through the reorganization process referenced in [ADS 102](#).

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Acronyms

- BRM – Office of Budget and Resource Management
- CHCO – Chief Human Capital Officer
- DCHCO – Deputy Chief Human Capital Officer
- ELR – Employee & Labor Relations
 - Corresponds with the Unions
- ER – Executive Resources
- FSC – Foreign Service Center
- GC – Office of the General Counsel
- HCSC – Human Capital Services Center
- HCTM – Human Capital and Talent Management
- LPA – Bureau for Legislative and Public Affairs
- M – Bureau for Management
- NFC – National Finance Center
- NSDD-38 – National Security Decision Directive 38
- OCRD – Office of Civil Rights & Diversity
- OOU – Overseas Operating Unit (Mission, Office)
- OPEF – Overseas Position Evaluation Form
- PD – Position Description
- PPSM – Workforce Planning, Policy, and Systems Management
- PSC – Personal Service Contractor
- SDAA – Senior Deputy Assistant to the Administrator
- SEC – Office of Security
- SM – Systems Management
 - HR Connect
 - NFC
 - ServiceNow
- WPP – Workforce Planning and Program

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