Organization Change Process

Phase One: Unit Pre-Planning Checklist

**Phase One: Unit Pre-Planning**
- Review the Organization Change website for an understanding of the complete Organization Change Process.

- Identify decision makers and stakeholders
  - Who will be impacted, and who will be responsible for making the final decisions regarding changes in an organization?

- Complete Unit Pre-Planning Worksheet
  - What problem are you trying to solve?

- Prepare/update current state organization charts
  - What does your organization look like today?

- Prepare/update future state organization charts
  - What would you like your organization to look like in the future?

- Review the Organization Change Policy document
  - What approvals are required for the desired change?

- Contact the Organization Planning Group to confirm approval requirements for the desired change

- Request approval for the desired change

- Approval Received

- Request to schedule an Organization Planning Meeting to coordinate the approved change
  - Make sure to invite appropriate decision makers and stakeholders
Phase One: Unit Pre-Planning Checklist (Cont’d)

Phase Two: Planning and Preparation
- Organization Planning Meeting invitation received with pre-tasks and meeting agenda
- Provide Organization Planning Group with copy of the Unit Pre-Planning Worksheet and Org Charts completed in the Unit Pre-Planning section of this checklist
- Attend the Organization Planning Meeting and complete Timeline of tasks to be completed for approved change
- Receive formal copy of Timeline from Organization Planning Group and invitation for follow up meeting

Phase Three: Implementation
- Follow up meeting completed
- OOI Timeline Tasks completed
- HR Timeline Tasks completed
- Security Timeline Tasks completed
- Finance Timeline Tasks completed
- OPB Budget Timeline Tasks completed
- Unit Timeline Tasks completed
- Organization Planning Group sends email indicating completion of all System tasks
- Organization(s) available for regular business use in all environments
- Units use new organization(s) to complete any remaining functional tasks
  - Confirm reporting is functioning as intended, continue to modify roles, etc