

**ARMY EQUIPMENT ALLOCATION and DISTRIBUTION: ROLES,
RESPONSIBILITIES, PROCEDURES and AUTHORITIES (RRPA)**

Effective Date: 19 June 2015

UNCLASSIFIED

Army Equipment Allocation and Distribution: Roles, Responsibilities, Procedures, and Authorities

FOREWORD

The Army remains the best-trained, best-equipped, and best-led force in the world even in these austere times. Although the Army continues to meet the challenges caused by new and difficult missions around the world, we are grappling with reduced manpower, training, and modernization caused by sequestration and budget constraints. Responding to these challenges requires all stakeholders to ensure the policies and processes used to equip our Soldiers are fully understood across the Army so that equipment readiness is maximized.

The Army's goal is to develop and field the mix of equipment needed to ensure that our Soldiers have the right equipment, for the right missions, at the right time. Equipping the Army to be ready to deploy rapidly around the world provides our nation with unmatched capabilities to win.

Properly equipping our forces requires synchronization across multiple Army staffs and commands. The enclosed document provides clear guidance on Army Equipment Allocation and Distribution Roles, Responsibilities, Procedures, and Authorities (RRPA).

This guidance is effective immediately and supersedes the document titled Army Equipping RRPA, dated 10 September 2013. I encourage you to analyze and share this information across your organizations to ensure your planning, policies, procedures and equipping actions are in keeping with its content.



ANTHONY R. IERARDI
Lieutenant General, U.S. Army
Deputy Chief of Staff, G-8

Army Equipment Allocation and Distribution: Roles, Responsibilities, Procedures, and Authorities

Table of Contents

1. References.....1

2. Purpose.....1

3. Intent1

4. Concept.....2

5. Roles, Responsibilities, Procedures and Authorities by Organization.....3

Annex A – Army Equipping Allocation and Distribution Process Overview.....A-1

Annex B – Army Equipping Allocation and Distribution Quarterly Update Timeline.....B-1

Annex C – Lead Materiel Integrator (LMI) Army Distribution Process Overview.....C-1

Annex D – Decision Support Tool (DST) Overview.....D-1

Annex E – Authorization Document Modernization Process Overview.....E-1

Annex F - Terms of Reference.....F-1

Army Equipment Allocation and Distribution: Roles, Responsibilities, Procedures, and Authorities

1. References:

- a. Memorandum, Army Directive 2011-06, 22 Mar 11, Designation of Army Materiel Command (AMC) as Lead Materiel Integrator (LMI).
- b. Memorandum, Secretary of the Army, 21 Oct 11, Transition and Implementation (T&I) Plan for LMI.
- c. PLANORD, Headquarters, Department of the Army (HQDA), 28 Nov 11, T&I Plan for the Army's LMI Management Approach.
- d. Message, HQDA ALARACT 035/2012, 162136Z Feb 12, Army EXORD 095-12 For the Army's LMI Management Approach.
- e. Memorandum of Agreement, Army Materiel Command (AMC) G-4 and HQDA, Deputy Chief of Staff, G-8, Force Development (HQDA, DCS, G-8, FD), 16 Nov 12, Establishing Coordination Business Rules in Support of the Phase 2 Lead Materiel Integrator Transition between HQDA G-8 and Army Materiel Command.
- f. General Order No. 2012-01, HQDA, 11 Jun 12, Assignment of Functions and Responsibilities within Headquarters, Department of the Army.
- g. Army Regulation (AR) 710-1, 20 Sep 07, Centralized Inventory Management of the Army Supply System.
- h. AR 710-2, 28 Mar 08, Supply Policy Below National Level.
- i. AR 220-1, 15 Apr 10, Army Unit Status Reporting and Force Registration – Consolidated Policies.
- j. AR 700-142, 17 Jan 13, Type Classification, Materiel Release, Fielding, and Transfer.
- k. Pamphlet, Department of the Army (DA) Pamphlet 700-142, 1 Jul 14, Instructions for Type Classification, Materiel Release, Fielding and Transfer.
- l. AR 350-1, 19 Aug 14, Army Training and Leader Development.
- m. Instruction, Department of Defense Instruction 1225.06, 16 May 12, Equipping the Reserve Forces, Defense Planning Guidance.
- n. FRAGO 4 (Reinforce Campaign on Property Accountability) to EXORD 214-13 (FY14-15 Army Readiness Plan), 25 Aug 14.
- o. FRAGO 7 (Priority Equipping) to EXORD 214-13, 18 Feb 15.

2. Purpose:

Army equipping is a team effort that requires a clear understanding of all stakeholders' responsibilities and interdependencies to maximize equipment readiness. This document defines roles, responsibilities, procedures and authorities for materiel management stakeholders within the Army equipping process as it pertains to materiel allocation and distribution of new, recapitalized and reset equipment that is pushed

Army Equipment Allocation and Distribution: Roles, Responsibilities, Procedures, and Authorities

(issued) to units (referred to as 'equipping' throughout this document). Stock funded equipment, pulled (requisitioned) by units, is not covered in this document but is covered in AR 710-2, Supply Policy Below the National Level.

3. Intent:

The intent of this document is to clarify equipping roles, responsibilities, procedures and authorities based on process improvements to how the Army plans the allocation and distribution of unit equipment (Annex A). These process improvements are based on the continued maturation of the Army's LMI approach which appointed AMC responsibility and authority for managing equipment distribution and redistribution in accordance with (IAW) Department of Defense (DoD) and Army directives, priorities, and the Army's force generation process. Equipping stakeholders have and will continue to develop supporting business rules and tactics, techniques, and procedures (TTP) nested with and subordinate to the overarching RRPA.

4. Concept:

a. Headquarters Department of the Army (HQDA), Deputy Chief of Staff (DCS), G-8 maintains Army staff responsibility to plan and program for materiel equipment and retains responsibility for component (COMPO) level allocations of new or recapitalized equipment. IAW the Secretary of the Army and Chief of Staff of the Army directive, AMC is the LMI, with Army Sustainment Command (ASC) as AMC's executive agent. As the LMI, AMC has the responsibility and authority for managing equipment distribution and redistribution missions for the Army. IAW HQDA General Order No. 2012-01, the Army Secretariat, Headquarters Department of the Army Staff (ARSTAF), and senior commanders of Army Commands (ACOM), Army Service Component Commands (ASCC), Direct Reporting Units (DRU) and COMPOs retain Title 10 authority.

b. The allocation and distribution functions (Annex A), as part of the Army equipping process, reflect AMC's overall responsibility and authority for developing, coordinating, and synchronizing distribution of Army new/recapitalized equipment in accordance with DoD and Army directives and priorities. AMC/ASC will facilitate commands' unit equipping efforts in order to maximize Army readiness.

c. Materiel distribution and redistribution are based on authorization levels as delineated in Modified Tables of Organization and Equipment (MTOE), Tables of Distribution and Allowances (TDA), Augmentation TDAs (AUG TDA), Letters of Authorization (LOA), Operational Needs Statements (ONS), Joint Urgent Operational Need (JUON), Joint Emergent Operational Need (JEON), Mission Essential Equipment Lists (MEEL), and IAW Army priorities and senior leader directives.

d. The LMI Decision Support Tool (DST) (Annex D) is the Army's collaborative tool used to synchronize the distribution and redistribution of materiel IAW Army priorities and senior leader directives. DST receives information from the Logistics Information

Army Equipment Allocation and Distribution: Roles, Responsibilities, Procedures, and Authorities

Warehouse (LIW), which is the Army's single authoritative materiel data repository. In order to help provide a common operating picture for distribution and redistribution actions, LIW receives data from sources such as Property Book Unit Supply Enhanced (PBUSE), Global Combat Support System – Army (GCSS-A), Logistics Modernization Program (LMP), Army War Reserve Deployment System (AWRDS), Defense Property Accountability System (DPAS), Force Management System Website (FMS-Web) and the Army Equipping Enterprise System (AE2S). Within DST, equipping stakeholders are able to obtain near real-time asset visibility and propose sourcing decisions to build unit readiness.

e. The Army Equipping Enterprise System (AE2S) is the Army's authoritative equipping tool for the Planning, Programming, Budgeting and Execution of procurements of Line Item Numbered (LIN) equipment. AE2S provides the automated means for collecting available quantities of Equipment Program Evaluation Group (EE PEG) managed LINs and AMC Critical Items procured with EE PEG programmed funding. AE2S is the primary system for component allocations reporting to Congress on Congressional Budget Justification Documents and annual transparency reporting. AE2S works with Logistics Support Agency (LOGSA) systems to ensure mutually supporting data sharing supports the equipping process.

f. The LMI concept will continue to mature as lessons are learned. Additionally, the development and implementation of the Army's new force generation model, known as the Sustainable Readiness Model (SRM), will influence equipping policy. The roles, responsibilities, procedures, and authorities will continue to evolve as the equipping community develops improved methods of doing business in support of the LMI process and the SRM. As a result, HQDA G-8 will lead periodic policy reviews to update this document. Additionally, all proponent agencies will ensure updates to ARs and DA Pamphlets reflect process improvements captured in this document.

5. Roles, Responsibilities, Procedures, and Authorities by Organization:

a. Office of the Assistant Secretary of the Army for Acquisition, Logistics, and Technology (ASA (ALT)). Per HQDA General Order No. 2012-01, ASA (ALT) retains all Title 10 authority and the principal responsibility for all HQDA matters and policy related to acquisition, logistics and technology. ASA (ALT) will develop policy for and oversee Program Executive Offices, Program Managers (PEOs/PMs) and Product Directors (PDs) who will:

(1) During each quarterly update cycle, provide HQDA G-8 the EE PEG funded forecast of new production and recapitalized available quantities for the ensuing 21 month period. Program Managers will directly input, by month, contracted available quantities using the PM Available Module in the AE2S. Monthly available quantity data entered into AE2S will not be constrained due to PM fielding team capacity, readiness of units to receive the equipment, or other limiting factors; monthly available quantities will equal quantities that are ready for distribution regardless of these limiting factors.

Army Equipment Allocation and Distribution: Roles, Responsibilities, Procedures, and Authorities

(2) Coordinate with AMC/ASC (LMI) and ACOM/ASCC/DRU/COMPOs for distribution planning and New Equipment Fielding (NEF) to execute the Army's Equipping and Modernization Strategies and other HQDA equipping policies and directives. Synchronize all materiel fieldings with AMC/ASC (LMI) approved Proposed Sourcing Decisions (PSD) in DST, which are based on current and/or approved MTOEs or HQDA G-3 directed priorities. Execute fieldings to only units that possess the materiel authorization.

(3) Execute materiel fieldings, IAW AMC/ASC (LMI) materiel distribution planning and per AR 700-142. Develop Materiel Fielding Plans (MFP) and coordinate with active and reserve component units to schedule equipment issues, New Equipment Training (NET), Total Package Fielding (TPF) and other actions that encompass new fieldings. Synchronize and execute NET and NEF IAW Army Regulation 350-1 (Army Training and Leader Development), and DA Pamphlet 700-142 (Instructions for Type Classification, Materiel Release, Fielding and Transfer) to execute the Army's Equipping and Modernization Strategies and other policies and directives.

(4) Coordinate with HQDA, AMC and ACOMs/ASCCs/COMPOs to provide NEF and NET schedules to ensure nesting with Army priorities and documentation, and to facilitate ACOM long-range planning with units.

(5) Maintain equipment accountability by ensuring all materiel is properly entered into the corresponding authoritative systems of record (i.e., PBUSE, GCSS-A) and once fielded, transfer equipment to gaining unit property book in PBUSE/GCSS-A/AWRDS.

(6) In coordination with (ICW) AMC/ASC (LMI), support ACOM/ASCC/DRU led Unit Equipping and Reuse Working Groups (UERWG) and UERWG-Expanded (E), as required.

(7) IAW AMC/ASC (LMI), participate in the Proposed Sourcing Decision (PSD) vetting process, IAW annex B.

(8) Support AMC/ASC (LMI) in the integration of the materiel fielding process (includes planning, vetting, execution and tracking of new equipment distribution) into DST.

(9) Execute specified responsibilities IAW Annex B of this document.

(10) Support HQDA G-8 in developing criteria and executing process for 'exempting' HQDA G-8 managed LINs from the Allocation and Distribution Quarterly Update.

(11) Report production delays and/or stoppages affecting delivery of equipment in meeting required delivery dates to AMC/ASC (LMI), HQDA G-8 and G-3 Force Management (FM).

Army Equipment Allocation and Distribution: Roles, Responsibilities, Procedures, and Authorities

(12) Participate in HQDA G-3 led equipment issue adjudication processes, as required. Equipment distribution and redistribution issues will be resolved at the lowest level possible. If resolution cannot be achieved at the lower levels, HQDA level forums such as the AR2B, Army Equipping and Reuse Working Group (AERWG) Integrated Process Team or special forums will adjudicate the issue.

(13) Provide disposition instructions for all Class VII equipment, to include approval for equipment turn-in.

(14) IAW HQDA G-8 and AMC/ASC (LMI), support the semi-annual AERWG for equipping distribution sessions, Draft MTOE Equipment Review Sessions (DMERS), and special topics.

b. ACOMs, ASCCs, DRUs, and COMPOs will:

(1) Exercise materiel distribution and redistribution within each of their commands based on HQDA G-3 approved authorizations and priorities.

(2) Serve as the entry point for their subordinate units regarding the AMC/ASC (LMI) distribution and redistribution mission and recommendations.

(3) Integrate use of DST within commands to facilitate the equipment distribution and redistribution process, ICW AMC/ASC (LMI).

(4) Direct units to bring property books up to record. Ensure equipment and components listed in the authorized column (of the MTOE and TDA documents) are on hand or on order (requisition submitted), IAW applicable regulations.

(5) Be responsible for Equipment on Hand (EOH), equipment readiness and mission readiness of the command.

(6) Ensure on-hand equipment, to include all items received from PMs, are accounted for within authoritative systems of record (e.g., PBUSE, GCSS-A) and aligned to MTOE or TDA requirements on the property books.

(7) Report/turn-in/redistribute excess IAW existing supply and materiel policies and processes.

(8) Provide HQDA G-3 materiel demands (e.g., an ONS request via Equipment Common Operating Picture (ECOP)), by-exception. IAW HQDA G-3 ONS/ECOP procedures, the submitting unit's higher level commands are responsible for endorsing submitted ONS. Endorsement confirms an urgent need exists and that the need cannot be addressed by standard Army processes or through some other means such as cross leveling between units. Coordinate equipment sourcing of validated HQDA G-3 capabilities with the appropriate materiel provider, i.e., AMC/ASC (LMI). Request final

Army Equipment Allocation and Distribution: Roles, Responsibilities, Procedures, and Authorities

sourcing solution approval at the Army Resourcing and Requirements Board (AR2B) Council of Colonels (CoC), and verify delivery of a materiel solution to complete the ONS requirement in ECOP.

(9) Support TPF, to include actions required to manage displaced materiel.

(10) ICW AMC/ASC (LMI), lead, schedule, coordinate and conduct UERWGs and UERWG-Es, as required. Establish support agreements with AMC/ASC (LMI) and other required stakeholders.

(11) Participate in the PSD vetting process, IAW AMC/ASC (LMI).

(12) Review/approve internally sourced Unit Distribution Plans (UDP). An internally sourced UDP is one sourced completely within the command through redistribution of its assets within authorized levels.

(13) Equipment distribution issues will be resolved at the lowest level possible. If resolution cannot be achieved at the lower levels, request HQDA level forums such as the AR2B, AERWG Integrated Process Team or special forums to adjudicate the issue.

(14) Ensure the execution of LMI sourcing directives, equipment transfers and receipt of equipment in PBUSE/GCSS-A are IAW established policies.

(15) Ensure equipment in internal lateral transfers are not Component Major Item (CMI) or Associated Support Items of Equipment (ASIOE) of other major end items. Provide internal disposition for complete systems to include all ASIOE and CMI as defined by the basis of issue plan.

(16) IAW HQDA G-8 and AMC/ASC (LMI), support the semi-annual AERWG for the: equipping distribution sessions; DMERS; and the special topics.

c. United States Army Materiel Command will:

(1) Exercise authority, as the Army's LMI, to manage and synchronize materiel distribution and redistribution planning and execution for all Army equipment to ACOMs, ASCCs, DRUs, and COMPOs IAW Army priorities, DoD and Army policy, Army authorization and prioritization documents, appropriate statutes, and authoritative inputs (e.g., HQDA G-8 allocations and HQDA G-3 directed authorizations).

(2) Advise Senior Army Leadership about Army-wide materiel issues and materiel readiness. Respond to requests for information (RFIs) about equipment distribution and/or redistribution from senior leaders, Congress, and others, as required/tasked.

Army Equipment Allocation and Distribution: Roles, Responsibilities, Procedures, and Authorities

(3) Serve as the proponent for the DST. Link equipment demands with supply (e.g., fielded assets, new production, recapitalization (RECAP), depot repairs and reset) in DST to forecast sourcing against future requirements with the intent of providing consistency, transparency, and optimized solutions. Coordinate with Forces Command (FORSCOM) to establish an agreement and process to obtain HQDA approved equipment demand data (e.g., MTOEs, TDAs, ONS, Mission Essential Equipment Lists (MEELs), and Operational Projects (OPROJ)) from the Materiel Demand Module (MDM) for consumption in DST for equipment distribution management. Collaborate with HQDA, ASA (ALT), ACOMs, ASCC, DRUs and COMPOs on DST capability refinement, training and sustainment.

(4) Produce integrated materiel sourcing recommendations to meet all Army materiel requirements. Develop UDP recommendations and PSDs to optimize Army EOH readiness. Facilitate the PSD vetting process with stakeholders. Ensure PSDs for materiel transfers take into account system of systems that need to move with their associated equipment. For example, TPF items (e.g., additional LIN equipment needed to complete the capability of the primary system) need to transfer with the end item.

(5) ICW HQDA G-8 System Synchronization Officers (SSO), PMs, and Commands, provide quarterly collaborated equipment distribution plans (proposed sourcing decisions) to ACOMs/ASCCs/DRUs/COMPOs a minimum of nine months prior to distributions. Additional equipment distribution plans may be necessary for regional rotational units, IAW contingency operations. The goal is to synchronize distribution with MTOE development as part of the Command Plan process.

(6) ICW materiel stakeholders, verify authorizations with EOH and projected new and depot production materiel to verify excess and equipment shortages.

(7) ICW HQDA G-4 and G-8, ensure that AE2S/EQUIPFOR and DST are complementary and mutually supporting. Establish and periodically review memorandum of agreements and system interface agreements to facilitate data sharing between LIW and other authoritative automated systems. The Standard Study Number-Line Item Number Automated Management & Integrating System (SLAMIS) General Officer Steering Committee (GOSC), LMI Transition Board, or designated forum will be used to inform senior leaders, make recommendations and resolve issues. This does not change normal organizational command and control of systems. Any recommendations that impact the LIW or other Army logistics portfolio systems will be presented to the G-4 LOG Domain for review and validation.

(8) Plan, coordinate and synchronize materiel to support integrated system fielding events based on PM, HQDA G-8, Life Cycle Management Command (LCMC) and depot functions.

Army Equipment Allocation and Distribution: Roles, Responsibilities, Procedures, and Authorities

(9) ICW HQDA G-8 SSOs and HQDA G-3, obtain LOAs to support any distribution of equipment where Basis of Issue Plans (BOIPs) have not been applied to Army TOEs/MTOEs.

(10) Support ACOM, ASCC, DRU and COMPO requested UERWG / UERWG-E and coordinate support from LCMCs (e.g., TACOM, Communications Electronics Command (CECOM) and Aviation and Missile (AMCOM), PEOs and HQDA G-8 SSOs, as required.

(11) On request, provide equipping analysis to ACOM, ASCC, DRU and COMPO internal plans or projects, e.g., annual excess runs, analysis of unit activations and inactivations, unit relocations and second destination transportation (SDT) estimates. Also, ICW with Commands, ensure that distributions to inactivating units are cancelled, if required.

(12) Execute specified responsibilities IAW Annex B of this document. Co-lead, ICW HQDA G-8, the tracking and completion of the allocation-distribution timeline for each quarter.

(13) Support HQDA G-8 in developing criteria and executing process for 'exempting' HQDA G-8 managed LINs from the Allocation and Distribution Quarterly Update.

(14) Provide data to AE2S IAW established data sharing agreements with HQDA G-8. Required data includes:

(a) Available quantities of Sustainment Program Evaluation Group (SS PEG) funded depot output of G-8 managed LINs per SLAMIS HQDA LIN List (includes contractor reset assets) that are available for HQDA G-8 allocation during each quarterly update cycle as AE2S input. These quantities are considered national assets—meaning the equipment was removed from a unit's property book and sent to depot for reset, again funded by SS PEG. The allocation is necessary because these quantities will not be returned to the original unit and are available for national redistribution based on HQDA G-3 priorities. In coordination with HQDA G-8, develop and implement an automated process to provide these available quantities to the AE2S. Any exceptions must be coordinated and approved with HQDA G-8 and AMC/ASC (LMI).

(b) Quarterly updates of all distribution and redistribution plans for all LINs.

(c) Quarterly updates of verification of receipt by reserve components of all Army new and RECAP LINs for mandated transparency reporting IAW Department of Defense Instruction 1225.06.

(15) Provide/enter equipment sourcing solution recommendations for ONS/Equipping Sourcing Document (ESD) in the ECOP database and present sourcing solutions to the AR2B CoC for approval. Upon approval of equipment sourcing solution,

Army Equipment Allocation and Distribution: Roles, Responsibilities, Procedures, and Authorities

execute equipment distribution. ICW HQDA G-4, verify unit received and brought to record all ONS approved equipment IAW procedures established by HQDA G-3.

(16) Report all excess HQDA G-8 managed LINs to HQDA G-8. Additionally, inform HQDA G-8 of critical materiel shortages (IAW Army authorized demands, on-hand assets and priorities).

(17) Report depot production delays and/or stoppages that affect LIN required delivery dates to required stakeholders.

(18) ICW HQDA G-3, G-4, G-8, and/or ACOMs, ASCCs, DRUs and COMPOs, support LIN analysis, unit equipping forums and working groups such as: Strategic Readiness Update (SRU), Troubled LIN Forum, Divestiture Working Group, and Equipment Requirements and Validation Board (ERVVB).

(19) ICW HQDA G-8, co-lead the AERWG activities in order to address commands' equipment distribution and redistribution requirements and modernization issues.

(20) IAW HQDA policy and ARSTAF guidance, manage the distribution and redistribution of War Reserve and Army Prepositioned Stocks (APS); for Class VIII, coordinate with Office of the Surgeon General (OTSG) G-4, Directorate of Logistics.

(21) Request HQDA G-8 approval for any redistribution actions triggering DODI 1225.06 replacement plans. Coordinate execution of DODI 1225.06 replacement plans IAW HQDA G-8 directions.

(22) Request HQDA G-8 approval for any distributions of HQDA G-8 managed equipment that would require directing allocations from one component to another before finalizing plans.

(23) Allocate, IAW G-8 policy, AMC Critical Items procured by the EE PEG in the AE2S/EQUIPFOR.

(24) ICW HQDA G-8, ensure guidance provided by the Army Equipment Program in support of President's Budget, Army Equipping Modernization Strategy, and Army Equipping Guidance are nested in equipment distribution actions.

(25) Ensure funding is requested to repair unserviceable but repairable assets at depot.

Army Equipment Allocation and Distribution: Roles, Responsibilities, Procedures, and Authorities

(26) Request HQDA level forum such as the AR2B, AERWG Integrated Process Team or special forum to adjudicate LIN distribution and redistribution issues to include, but not limited to, inter-command materiel transfers between ACOMs, ASCCs, and DRUs, that cannot be resolved at lower levels.

(27) Chair an equipment distribution review board to review open disposition requests and address LIN distribution and redistribution issues associated with PSDs.

d. Forces Command (FORSCOM), in addition to responsibilities in Para 5.b., will:

(1) ICW HQDA G-3 and AMC (LMI) obtain HQDA approved equipment demand data (e.g., MTOEs, TDAs, ONS, MEELs, and OPROJs) for consumption in the MDM and feeding to the DST for equipment distribution management.

e. Training and Doctrine Command (TRADOC), in addition to responsibilities in Para 5.b., will:

(1) Develop future concept-based required capabilities and Doctrine, Organization, Training, Materiel, Leadership and education, Personnel, and Facilities solutions IAW the Joint Capabilities Integration and Development System.

(2) Ensure that the JCIDS Process fully documents Basis of Issue Plans requirements to support the institutional training base.

(3) Provide HQDA G-3 materiel demands for approved Structure Manning Decision Review (SMDR), Training Resource Arbitration Panel (TRAP) and Equipment Review and Validation Board (ERVVB) decisions.

(4) Advise AMC/ASC on TRADOC specific materiel distribution/redistribution synchronization issues.

(5) Update Programs of Instruction (POI) in TRADOC schools to reflect the LMI process on equipping the Army, to include DST training.

f. Army National Guard (ARNG). The Director, ARNG has appointed the ARNG G-4 to serve as the LMI for the ARNG and will continuously collaborate with AMC/ASC and HQDA G-8. The ARNG, in addition to responsibilities in Para 5.b., will:

(1) Advise AMC/ASC on ARNG-specific materiel distribution/redistribution issues.

(2) Coordinate distribution and redistribution actions with states. Remain the approval authority for ARNG units' excess equipment IAW AR 710-1 Chapter 1-17.

Army Equipment Allocation and Distribution: Roles, Responsibilities, Procedures, and Authorities

(3) ICW AMC/ASC (LMI) and PMs, conduct LIN distribution planning in DST.

(4) Execute specified responsibilities IAW Annex B of this document.

(5) Verify receipt of all new and RECAP LINs for mandated transparency reporting IAW Department of Defense Instruction 1225.06.

g. United States Army Reserve (USAR). The Commander, Army Reserve (CAR) has appointed the USAR, G-4 to serve as the LMI for the USAR and will continuously conduct equipment management collaboration with AMC/ASC, as the Army's LMI. The USAR, in addition to responsibilities in Para 5.b., will:

(1) Advise AMC/ASC on USAR-specific materiel distribution/redistribution issues.

(2) ICW AMC/ASC (LMI) and PMs, conduct LIN distribution planning in DST.

(3) Execute specified responsibilities IAW Annex B of this document.

(4) Verify receipt of all new and RECAP Line Item Numbers (LINs) for mandated transparency reporting IAW Department of Defense Instruction 1225.06.

h. Office of the Surgeon General (OTSG)/U.S. Army Medical Command (MEDCOM), in addition to responsibilities in Para 5.b., will:

(1) Provide national-level data on medical maintenance and supply programs which are managed and executed to support ASA(ALT).

(2) Retain applicable medical equipment in Standard Army Maintenance System -Enhanced (SAMS-E).

(3) Ensure medical sustainment and maintenance support for fielded medical systems and equipment throughout the system's entire life cycle.

(4) Advise AMC/ASC on medical specific materiel distribution/redistribution issues.

(5) Coordinate with AMC/ASC (LMI) and COMPOs for Class VIII distribution planning and New Equipment Fielding to execute the Army's Equipping and Modernization Strategies and other HQDA equipping policies and directives. Synchronize all Class VIII materiel fieldings with current and/or approved MTOEs. Execute fieldings to only units that possess the materiel authorization.

Army Equipment Allocation and Distribution: Roles, Responsibilities, Procedures, and Authorities

(6) Maintain equipment accountability by entering new equipment within authoritative systems of record and once fielded, transfer equipment to gaining unit in PBUSE/GCSS-A.

(7) ICW AMC/ASC (LMI), integrate use of DST into the fielding process (includes planning, vetting, execution and tracking of new equipment distribution).

i. United States Army Special Operations Command (USASOC), in addition to responsibilities in Para 5.b., will:

(1) Serve as the authority for all Special Operations-specific (Major Force Program 11 (MFP-11)) materiel distribution and redistribution IAW United States Special Operations Command (USSOCOM) policies and directives. HQDA G-4 and G-8, AMC, and OTSG will continue to manage all Army Common (MFP-2) LINs in the command.

(2) Advise AMC/ASC on Army-common materiel distribution/redistribution issues specific to USASOC.

(3) Continually collaborate with AMC/ASC through its LMI Lead (USASOC G-4).

j. HQDA, DCS, G-3 will:

(1) Develop the Modernization Documentation Guidance (based on the HQDA G-8 Modernization Documentation recommendation). Utilize the Integrated Requirement Priority List (IRPL) and Dynamic Army Resource Priority List (DARPL) to apply equipment onto authorization documents. United States Army Force Management Support Agency (USAFMSA) will document IAW published Modernization Documentation Guidance during each Command Plan cycle. (See Annex E)

(2) Review and approve materiel demands (requirements). Provide FORSCOM all HQDA approved equipment demands (e.g., MTOEs, TDAs, ONS, MEELs, and OPROJs), with demand priorities, for input into the MDM so AMC (LMI) and HQDA G-8 can consolidate this data in DST and AE2S for equipment allocation and distribution management.

(3) As required, adjudicate distribution and redistribution issues. LIN distribution and redistribution issues will be resolved at the lowest level possible. If resolution cannot be achieved at the lower levels, HQDA level forums such as the AR2B, AERWG Integrated Process Team or special forums will adjudicate the issue.

(4) Adjudicate, as AR2B chair, final ONS sourcing solution(s) for approval / disapproval and verify delivery of approved materiel solution(s) to complete the ONS requirement in ECOP.

Army Equipment Allocation and Distribution: Roles, Responsibilities, Procedures, and Authorities

(5) Serve as approval authority for APS strategy, structure and equipment releases IAW IRPL and DARPL priorities.

(6) As required and in coordination with HQDA G-8, ensure LOAs are provided to AMC/ASC Materiel Integrators (MI) to support any required allocations and/or distributions for equipment where BOIPs have not been applied.

(7) Develop and post on the USAFMSA website Army Letters of Exemption (LOE) for hard-to-fill LINs with no sourcing solutions for 24-36 months.

(8) IAW AMC/ASC (LMI), support ACOM/ASCC/DRU led Unit Equipping and Reuse Working Groups (UERWG) and UERWG-Expanded (E), as required.

(9) IAW HQDA G-8 and AMC/ASC (LMI), support the semi-annual Army Equipping and Reuse Working Group (AERWG) for the: equipping distribution sessions; DMERS; and the special topics.

k. HQDA, DCS, G-4 will:

(1) Program national sustainment operations for PM managed equipment made available for integration by AMC for sustainment.

(2) Program for development and procurement of Logistics Management Information Systems and/or Standard Army Management Information System (STAMIS).

(3) Align sustainment program and budgeting requests to the HQDA G-3 equipment distribution priorities.

(4) Manage the HQDA G-4 centrally funded SDT Management Decision Package (MDEP) and coordinate the synchronization of SDT funding and distribution plans.

(5) ICW HQDA G-8 and AMC, establish an end-to-end distribution and redistribution policy for AMC's implementation. In establishing this policy, consider whether a "push" (issued) method, a "pull" (requisitioned) method, or a hybrid of both methods is optimal. Consider automation and personnel efficiencies when establishing the policy.

(6) Participate in HQDA G-3 led adjudication process for materiel management disputes and inter-theater equipment issues, as required. Equipment distribution and redistribution issues will be resolved at the lowest level possible. If resolution cannot be achieved at the lower levels, HQDA level forums such as the AR2B, AERWG Integrated Process Team or special forums will adjudicate the issue.

Army Equipment Allocation and Distribution: Roles, Responsibilities, Procedures, and Authorities

(7) Ensure allocation planning for Army HQDA G-4 managed equipment and other EE PEG procured AMC equipment is conducted quarterly in AE2S IAW Annex B.

(8) Review ACOM SDT Unfunded Requirements (UFR) in support of (ISO) inter-command redistribution of equipment.

(9) ICW HQDA G-3, review for approval APS loan requests.

(10) In coordination with HQDA G-8 and AMC ensure equipment allocation (e.g., AE2S) and distribution automation systems (e.g., DST) supporting HQDA and LMI processes are complimentary and mutually supporting. The SLAMIS GOSC, LMI Transition Board, or designated forum will be used to inform senior leaders, make recommendations and resolve issues. This does not change normal organizational command and control of systems. Any recommendations that impact the LIW or other Army logistics portfolio systems will be presented to the HQDA G-4 LOG Domain for review and validation.

(11) IAW AMC/ASC (LMI), support ACOM/ASCC/DRU led UERWG and UERWG-Expanded (E), as required.

(12) IAW HQDA G-8 and AMC/ASC (LMI), support the semi-annual AERWG for the: equipping distribution sessions; DMERS; and the special topics.

I. HQDA, DCS, G-8 will:

(1) Per HQDA General Order No. 2012-01, maintain Army Title 10 responsibility to plan, develop, and resource programs supporting Soldiers by balancing Current Force needs with Future Force capabilities. The Force Development Directorate conducts this mission IAW National Priorities and the Army Campaign Plan in support of Overseas Contingency Operations, Army Force Generation Equipping, and Capability Portfolios. Specific roles include translating materiel requirements into Program Objective Memorandum and Budget Solutions, translating organizational requirements into resourceable materiel solutions, providing integrated capability solutions to meet readiness requirements, and defending programs to Senior Leaders, Congress and the public.

(2) ICW ASA (ALT), develop plans for equipping the current and future Army through programming, materiel integration and studies.

(3) In support of the G-3 Command Plan process, provide Modernization Documentation Recommendation to HQDA G-3 for the development of the HQDA G-3 Modernization Documentation Guidance. HQDA G-8 recommendation will provide LIN quantity, by fiscal year and COMPO, based on inventory availability. (Refer to Annex E)

(4) ICW HQDA G-4 and AMC, establish an end-to-end distribution and redistribution policy for AMC's implementation. In establishing this policy, consider

Army Equipment Allocation and Distribution: Roles, Responsibilities, Procedures, and Authorities

whether a “push” (issued) method, a “pull” (requisitioned) method, or a hybrid of both methods is optimal. Consider automation and personnel efficiencies when establishing the policy.

(5) Maintain and update, as required, the Army Equipping RRP document. This document will provide stakeholder responsibilities and procedures for the allocations and distributions of HQDA managed equipment data within the approved Army automation systems, i.e., AE2S and DST.

(6) Execute specified responsibilities IAW Annex B of this document. Co-lead, ICW AMC/ASC, the tracking and completion of the allocation-distribution timeline each quarter.

(7) Serve as the ARSTAF lead for the DODI 1225.06 process within the Army.

(8) HQDA G-8 Synchronization Staff Officers (SSO) maintain oversight of HQDA G-8 managed LIN equipping ICW ASC. SSOs will:

(a) Retain responsibility for planning and programming; equipping; and modernizing the force with LINs managed by HQDA G-8; and retains responsibility for component level allocations and reallocations of new equipment, depot/recapitalized equipment, and reset equipment.

(b) Review ASC MI equipment distribution plans/PSDs for G-8 managed LINs to maintain the integrity of Planning, Programming, Budgeting and Execution (PPBE) and DODI 1225.06, and to ensure the Army Equipping Program in Support of the President’s Budget, Army Equipping Modernization Strategy, Army Equipping Guidance, Army Program Guidance Memorandum (APGM) and Army Planning Priorities Guidance (APPG) are nested in distribution and redistribution activities.

(c) Provide recommendations/requests, ICW ASA(ALT)/PMs and ASC, to exempt LINs from quarterly equipping plan requirements based on Exempt LIN criteria defined in Annex F. HQDA G-8 FD (Director of Materiel (DOM) and Director of Resources (DOR)) will make final approval of exempted LINs.

(d) Ensure AMC/ASC (LMI), ACOMs, ASCCs, DRUs and COMPOs are aware of changes to guidance, policies, strategies, and equipping priorities effecting HQDA G-8 managed LINs.

(e) As required, assist ASC MIs during LIN analysis forums and working groups such as: Troubled LIN Forum, Divestiture Working Groups, EVRBs, ONS, UERWGs, UERWG-Es and AERWGs.

Army Equipment Allocation and Distribution: Roles, Responsibilities, Procedures, and Authorities

(f) Conduct and provide quarterly allocation plans IAW data sharing agreement between LIW and AE2S. This includes new, recapitalized, cascaded and national level reset depot output provided by PMs and AMC. Allocation will be projected 21 months IAW availability, Army Program Objective Memorandum (POM), and HQDA G-3 priorities.

(9) ICW HQDA AMC, co-lead the AERWG activities in order to address commands' equipment distribution and redistribution requirements and modernization issues.

(10) Where applicable and with HQDA G-3 assistance ensure LOAs and LOEs are provided to AMC/ASC MIs and Commands to support any required allocations/distribution of equipment.

(11) ICW AMC/ASC (LMI) and PMs develop criteria and process for 'exempting' HQDA G-8 managed LINs from the Allocation and Distribution Quarterly Update.

(12) Monitor LMI provided equipping sourcing solutions of HQDA G-8 LINs for ONS/ESD.

(13) Assist HQDA G-3 in arbitrating materiel management disputes and inter-theater equipment issues. Equipment distribution and redistribution issues will be resolved at the lowest level possible. If resolution cannot be achieved at the lower levels, HQDA level forums such as the AR2B, AERWG Integrated Process Team or special forums will adjudicate the issue.

(14) ICW HQDA G-4 and AMC, ensure equipment allocation and distribution automation systems (i.e., AE2S/EQUIPFOR and LIW/DST) supporting HQDA and LMI processes are complimentary and mutually supporting. The SSN-LIN Automated Management and Integration System (SLAMIS) GOSC, LMI Transition Board, or designated forum will be used to inform senior leaders, make recommendations and resolve issues. This does not change normal organizational command and control of systems. Any recommendations that impact the LIW or other Army logistics portfolio systems will be presented to the HQDA G-4 LOG Domain for review and validation.

(15) ICW AMC, advise senior Army leadership on equipment readiness through the Strategic Readiness Update.

Annex A: Army Equipping Allocation and Distribution Process Overview

Allocation/distribution quarterly updates cover a 21 month period, which include a review/update of the previously planned months. The planning time horizon shifts each quarter of the fiscal year to add three new months at the end and places the three past months into the historical file. The first six months of distributions of each 21 month period are considered “locked” because they are inside of an already established Unit/Command materiel 180-days-out fielding schedule/agreement.

The following are the general steps that outline the allocation/distribution quarterly process. Refer to diagram A found on page A-2 that depicts these steps. Table B on page B-1 provides a detailed timeline of required stakeholder actions for this process.

1. Monthly Available Quantities.

a. PMs input monthly available quantities of equipment (LINs) in the PM Available Module inside AE2S. PMs input will consist of:

- New procurement funded by the EE PEG.
- Recapitalization funded by the EE PEG.

b. AMC provides HQDA G-8, through automation agreement, depot reset available quantity output funded by SS PEG. Available quantities include SS PEG funded depot output (includes contractor reset assets) of G-8 managed LINs, per SLAMIS HQDA LIN list, that are available for HQDA G-8 allocation during each quarterly update cycle. These quantities are considered national assets—meaning the equipment was removed from a unit's property book and sent to depot for reset. These quantities are available for national redistribution based on HQDA G-3 priorities.

Monthly available quantity data entered into AE2S is not constrained due to PM fielding team capacity, readiness of units to receive the equipment, or other limiting factors. Monthly available quantities will equal monthly quantities ready for distribution regardless of other limiting factors. Once complete, the AE2S system transfers the data to EQUIPFOR for G-8 SSO allocation.

2. Determine Monthly Allocations.

The HQDA G-8 SSOs use the available quantities provided by ASA (ALT)/PEOs/PMs and AMC/LCMCs to determine monthly LIN allocations by COMPO, regardless of other constraints. SSOs use HQDA G-3 priorities captured in the DARPL and COMPO allocations previously reported through the transparency reporting process in AE2S to allocate available LIN quantities to COMPOs. The SSOs determine and input COMPO LIN allocations into AE2S which provides the allocation information to the DST. Additionally, for the few AMC LINs which are EE PEG funded, AMC is responsible for allocating those LINs within AE2S.

3. Determine distribution plans/PSDs. The AMC/ASC, as LMI, coordinates and synchronizes, with all required stakeholders, equipment distribution plans/PSDs to

Annex A - Army Equipping Allocation and Distribution Process Overview

derivative Unit Identification Code (UIC) level. The AMC/ASC will base PSDs on authorization documents (MTOEs/TDAs), other G-3 approved equipment demands, the DARPL, G-8 allocations, PMs limiting factors and units ability to receive the equipment. AMC/ASC, ICW commands, manage the PSDs for COMPO 1 and 6. The ARNG and USAR, ICW AMC/ASC and PMs, manage distribution plans for COMPO 2 and 3 and will provide this data to AMC/ASC via the DST. Distributions must adhere to established COMPO allocations, unless coordinated with the G-8 SSO and G-8 DOR (FDP Division) in order to ensure HQDA transparency reporting requirements are met.

Allocations which are unable to be distributed due to limiting factor(s) in one month can be distributed in the following months.

4. Plan and execute fieldings. Through the AMC/ASC vetting of AA-level PSDs with ASA (ALT)/PEOs and/or LCMCs, PMs and Item Managers (IMs) develop, coordinate and execute PM fielding plans. PMs coordinate the delivery, fielding, NET, and TPF activities, as required.

5. Receive equipment. The last step in the allocation and distribution process is the unit receiving the equipment, ICW the PM or LCMC IM, and adding the equipment to its accountability system of record, e.g., PBUSE, GCSS-A, AWRDS. The AMC/ASC will then have the capability to verify unit receipt, as required. Additionally, unit receipt data will be transparent to other Army automated systems, such as AE2S and LIW.

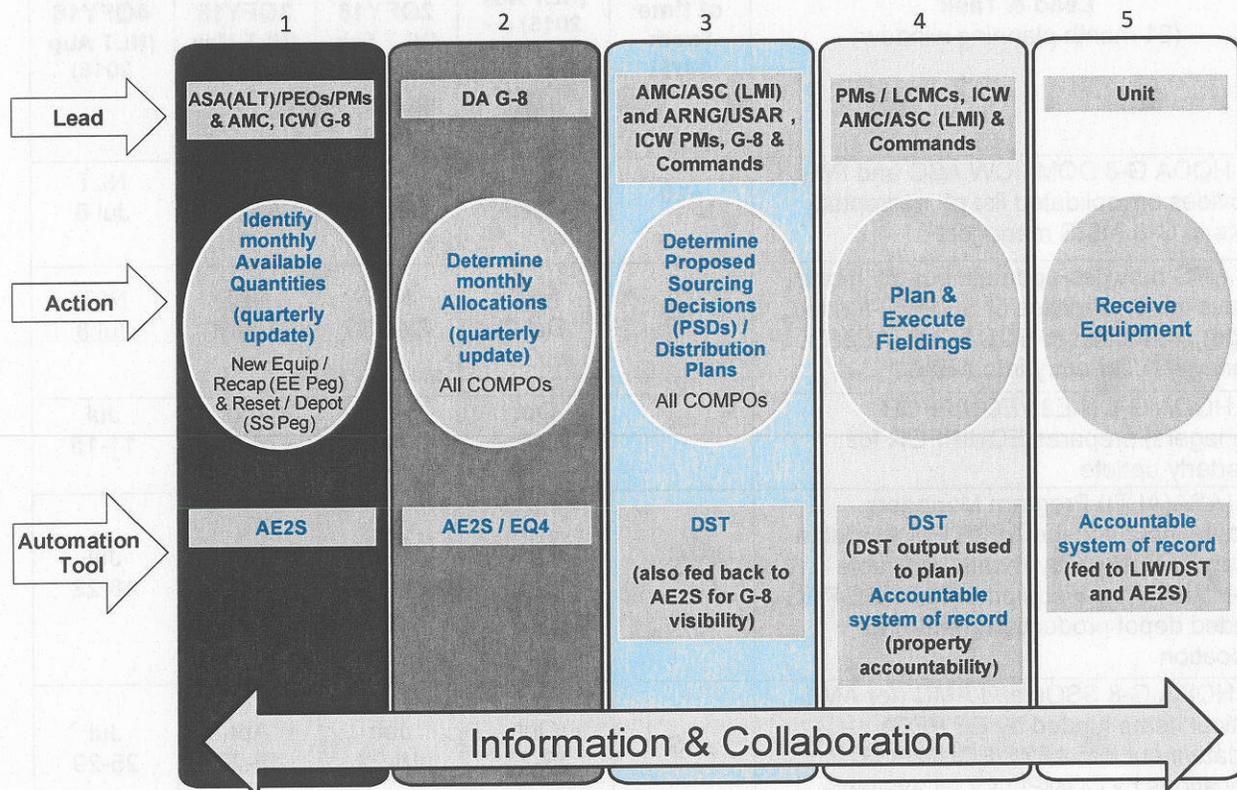


Diagram A – LIN Allocation and Distribution

Annex B – Army Equipping Allocation and Distribution Quarterly Update Timeline

Annex B – Army Equipment Allocation and Distribution Quarterly Update Timeline

Table A (below) identifies the actions required each quarter to complete a unit equipment allocation and distribution update. Army equipping is a team effort that requires clear understanding of all stakeholders' responsibilities and suspense's. For the equipping allocation and distribution process to work efficiently, stakeholder dependency on each other must be clearly defined and satisfied within a prescribed timeline.

Several tasks (e.g., calculations, automated data sharing, collaboration (via automation and manually, as required)) must be accomplished within a prearranged timeline so required information from stakeholders is provided to feed the process in a timely fashion. Table A, below, depicts an example of the normal sequence of stakeholder tasks and length of time that will be allocated each quarter to complete the quarterly allocation and distribution process for each required LIN.

Quarterly updates revolve around the HQDA G-3 distributed FY approved MTOEs scheduled annually for October release per HQDA G-3 Command Plan Guidance. Table A also provides the timeline for the next several quarters to complete each task so the process can be executed in a synchronized and timely manner.

Lead & Task (21 month planning window)	Amount of time (work days)	For 1QFY16 (NLT Nov 2015) per FY17 MTOEs or latest G-3 approved MTOEs	For 2QFY16 (NLT Feb 2016)	For 3QFY16 (NLT May 2016)	For 4QFY16 (NLT Aug 2016)
1. HQDA G-8 DOM, ICW ASC and PMs, provides consolidated list of exempted LINs to G-8 AE2S managers	~10	NLT Oct 2	NLT Dec 30	NLT April 1	NLT Jul 8
2. AMC provides update/input, by month, of available quantities of SS PEG-funded depot production to HQDA G-8 (AE2S managers), for entry into AE2S	~10	NLT Oct 2	NLT Dec 30	NLT April 1	NLT Jul 8
3. HQDA G-8 (AE2s/EQUIPFOR managers) prepares EQUIPFOR for quarterly update	~5	Oct 5-9	Jan 4-8	April 4-8	Jul 11-15
4. (ASA(ALT)) Program Managers update/input into the AE2S PM Available Quantity Module: by month, available quantities of new equipment and EE PEG-funded depot production (recap) for allocation	~5	Oct 13-16	Jan 11-15	Apr 11-15	Jul 18-22
5. HQDA G-8 SSOs and AMC (for AMC Critical Items funded by EE PEG) update/input into AE2S/EQUIPFOR allocations by COMPO for all available quantities	~5	Oct 19-23	Jan 18-22	Apr 18-22	Jul 25-29

Table A – Quarterly Allocation and Distribution Timeline (Example)

Annex B – Army Equipping Allocation and Distribution Quarterly Update Timeline

Lead & Task (21 month planning window)	Amount of time (work days)	For 1QFY16 (NLT Nov 2015) per FY17 MTOEs or latest G-3 approved MTOEs	For 2QFY16 (NLT Feb 2016)	For 3QFY16 (NLT May 2016)	For 4QFY16 (NLT Aug 2016)
6. HQDA G-8 (AE2s/EQUIPFOR managers) packages and provides all allocations to LOGSA	~2	Oct 26-27	Jan 25-26	Apr 26-27	Aug 1-2
7. LOGSA consumes AE2S/EQ4 data into LIW/DST	~2	Oct 28-29	Jan 27-28	Apr 28-29	Aug 2-3
8. ASC MIs, ARNG SIs and USAR SIs, ICW PMs and SSOs, update/develop coordinated and synchronized (vetted) distribution plans/PSDs in DST	~20	Nov 2-30	Feb 1-26	May 2-31	Aug 4-31
9. LOGSA, ICW ASC, packages and pushes distribution plans to HQDA G-8 (AE2s/EQUIPFOR managers) for AE2S consumption	~2	Dec 1-2	Feb 29-Mar 1	Jun 1-2	Sep 1-2
10. HQDA G-8 (AE2s/EQUIPFOR managers) consumes DST distribution data into AE2S	~2	Dec 3-4	Mar 2-3	Jun 3 & 6	Sep 5-6
11. ASC, ICW LOGSA and DA G-8 AE2S Managers, validates/assesses quarterly LIN Allocation & Distribution results & conducts Council of Colonels	~10	NLT Dec 18	NLT Mar 18	NLT Jun 17	NLT Sep 18

Table A (cont.) – Quarterly Allocation and Distribution Timeline (example)

HQDA G-8, ICW AMC/ASC, will manage and track the completion of the allocation-distribution timeline each quarter. Timelines for additional quarters that are not depicted in the above table will be developed and provided by HQDA G-8, ICW stakeholders.

Annex C – Lead Materiel Integrator Distribution Process to Army Equipping Roles, Responsibilities, Procedures, and Authorities

Annex C – Lead Materiel Integrator Distribution Process to Army Equipping Roles, Responsibilities, Procedures, and Authorities

The LMI uses HQDA determined priorities codified in the Dynamic Army Resource Priority List (DARPL) to ensure units are equipped IAW HQDA guidance. The DST captures all sources of supply for major end items and the DARPL.

The first line of operation for LMI is unit materiel distribution and redistribution execution in support of Army force generation; equipping and re-equipping units as they cycle through the force generation process.

AMC/ASC develops PSDs and UDPs to equip units IAW HQDA prioritization. The UDPs are then vetted with materiel stakeholders prior to execution. AMC/ASC (LMI) will coordinate with ACOM/ASCCs/DRUs/COMPOs to establish priorities for units not addressed on Army DARPL. Upon approval of the UDP, materiel stakeholders, i.e., depots and PMs, ship equipment to the gaining unit. After PM deprocessing and hand-off, units must add equipment on their property book within seven days of receipt or 30 days for COMPOs 2 and 3.

The DST is the authoritative collaborative tool to synchronize the distribution and redistribution of materiel in accordance with Army priorities and directives.

Each ACOM/ASCC/DRU/COMPO is responsible for managing its own equipment internally to the Derivative Unit Identification Code (DUIC) level. Each command may establish internal sourcing and vetting procedures for using the DST internally. For example, after a unit has exhausted its capability to “fix” or internally source itself, the next higher command reviews its internal assets to fill the requirements. This internal sourcing process continues until the ACOM/ASCC/DRU/COMPO has exhausted all available internal sourcing solutions. The LMI then completes sourcing from Army assets.

The LMI can recommend stock funded distribution courses of action (COA) between ACOM/ASCC/ DRU/COMPO units; however, as a general rule, the ACOM/ASCC/DRU/COMPO should reconcile stock funded shortages at their respective command level prior to engaging the LMI for assistance with those LIN shortages.

The LMI ensures distribution COAs will not adversely impact the readiness of MTOE or TDA documented LINs, to include other MTOE or TDA documented LINs that are Associated Support Items Of Equipment (ASIOE) per the major item LIN Basis of Issue Plan (BOIP).

Equipment distribution and redistribution issues will be resolved at the lowest level possible. If resolution cannot be achieved at the lower levels, AMC and/or Commands will use HQDA level forums such as the AR2B, AERWG Integrated Process Team or special forums to adjudicate the issue.

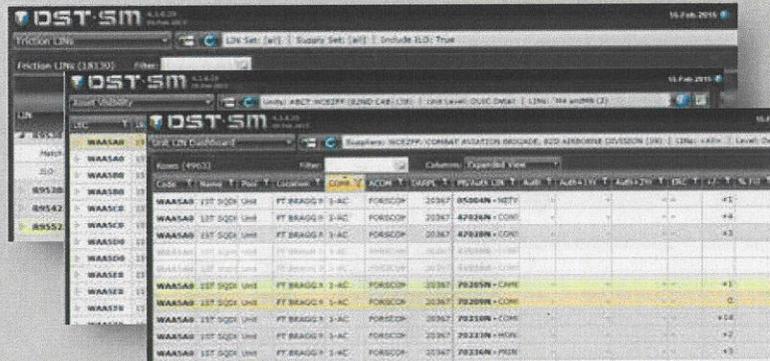
Annex D – Decision Support Tool (DST) Overview



DST is an unclassified, web-based, collaboration tool the Army uses to lead Army Materiel stakeholders through planning and execution of the Army's materiel distribution and redistribution processes. DST matches validated, prioritized equipment demands with available Army inventory in depots, units and other supply sources.

Total Army Asset Visibility:

- DST consumes authoritative source data for both on-hand quantities and authorization data.
- DST allows for complete visibility and asset posture across the Army.
- On-hand and transactional quantities are combined to show predictive on-hand across time.
- Daily updated Property Book Data (PBUSE & GCSS-A).

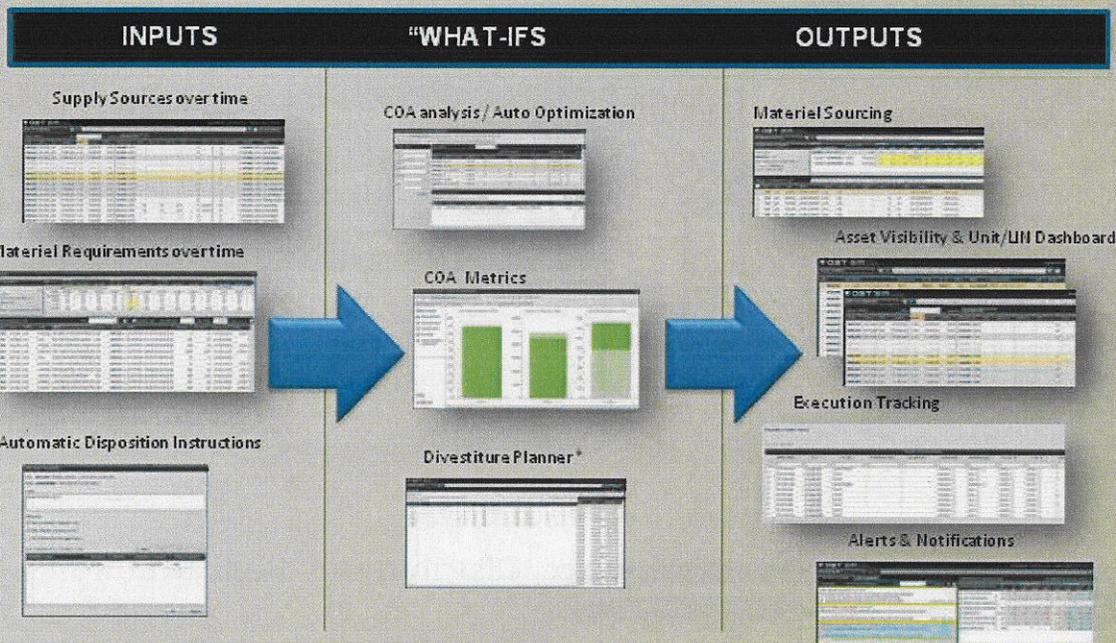


Distribution / Redistribution:

- DST enables:
- Identification of property excess / shortages across the Army.
 - Redistribution of excess property across all commands.
 - DEPOT level distributions.
 - Streamlining of DISPO instructions.

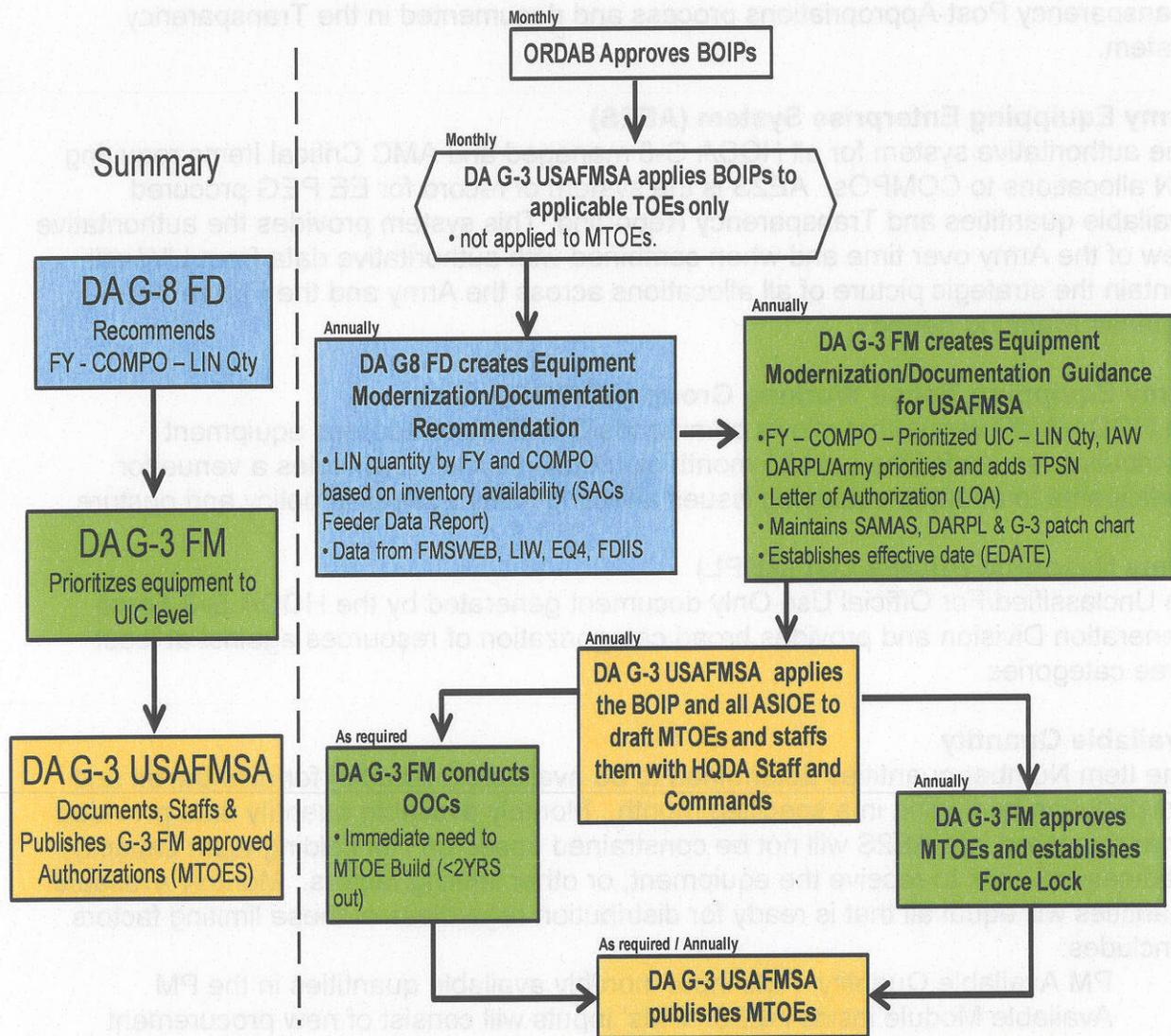
How Does LMI-DST benefit the Warfighter?

- Provides the capability to visualize total Army equipment demand and supply sources over time.
- Enables materiel managers to make timely sourcing decisions based on policy and Army priorities.
- Provides the capability to visualize the second and third order future effects of decisions made today in order to ensure the best use of Army equipment resources.
- Is a web-based enterprise system that enables the LMI and the entire materiel enterprise the ability to collaborate in a common transparent environment.
- Quickly identifies excess equipment that could be used to fill potential shortages
- Allows for factors such as location and transportation costs to be considered before making a decision.
- Enables NIIN level Automatic Disposition for Turn-Ins.
- Automates Execution Tracking for Lateral Transfers and Turn-ins to show directive completion.
- Predictive EOH function allows for projecting unit readiness.
- Alert and Notification capability for user created transactions.



Annex E – Authorization Document (MTOE) Modernization Process Overview

It is important that Army equipping stakeholders understand HQDA actions taken to modernize MTOEs. MTOEs are what drive AMC/ASC (LMI) equipment distribution plans for units, PM fielding plans with units and unit readiness reporting. Thus, MTOE modernization must be synchronized with new equipment fielding and tailored to best enable unit readiness for Army global force management mission assignments and equipment readiness reporting. Additionally, ASIOE and CMI must be identified, documented and synchronized to properly resource.



Annex F – Terms of Reference to Army Equipping Roles, Responsibilities, Procedures, and Authorities

Allocations

Line Item Number allocations are initially programmed by Fiscal Year during the Program Objective Memorandum (POM) build to COMPO level and then budgeted in the President's Budget and Post Appropriations for a specific Fiscal Year of appropriation. Subsequently, LIN allocations are made by SSOs in AE2S/EQ4 each month based on the PM's identification of monthly available quantities from new production and recapitalization and AMC reset quantities. Allocations are designated by COMPO (Active, ARNG, USAR and APS). Allocations are adjusted during the Transparency Post-Appropriations process and documented in the Transparency system.

Army Equipping Enterprise System (AE2S)

The authoritative system for all HQDA G-8 managed and AMC Critical Items requiring LIN allocations to COMPOs. AE2S is the system of record for EE PEG procured available quantities and Transparency Reporting. This system provides the authoritative view of the Army over time and when combined with authoritative data from LIW will contain the strategic picture of all allocations across the Army and the Future Year Defense Planning period.

Army Equipping Reuse Working Group (AERWG)

An HQDA/AMC venue that allows commands/COMPOs to address equipment distribution issues for the next 21 month distribution cycle. It provides a venue for participants to address equipping issues affecting Army equipping policy and posture.

Army Resource Priority List (ARPL)

An Unclassified/For Official Use Only document generated by the HQDA G-3 Force Generation Division and provides broad categorization of resources against at least three categories.

Available Quantity

Line Item Number quantities determined to be available (issuable) for distribution and redistribution beginning in a specified month. Monthly available quantity data provided for and entered into AE2S will not be constrained based on PM fielding team capacity, readiness of units to receive the equipment, or other limiting factors. Monthly available quantities will equal all that is ready for distribution regardless of these limiting factors. It includes:

- PM Available Quantity: PMs input monthly available quantities in the PM Available Module inside AE2S. PMs' inputs will consist of new procurement funded by the EE PEG and recapitalization funded by the EE PEG. Available quantities are quantities that are on contract or accepted by the Army via DoD Form 250, Material Inspection and Receiving Report. Additionally, available quantities are quantities accepted by the Army through the Prime Vendor program.

Annex F – Terms of Reference to Army Equipping Roles, Responsibilities, Procedures, and Authorities

- Depot reset quantity: AMC provides HQDA G-8, through automation agreement, depot reset quantity output funded by SS PEG

Collaborative Users

Designated COMPO and/or ACOM/ASCC/DRU representatives provided permissions in EQUIPFOR Plans and DST. The plan owner is responsible for distributing allocated quantities to the UIC level.

Decision Support Tool (DST)

The Lead Materiel Integrator unclassified, web-based, collaborative tool located on the Logistic Information Warehouse (LIW). The Lead Materiel Integrator uses DST to lead Army materiel stakeholders through the planning and execution of Army materiel distribution and redistribution. This system provides the authoritative view of Army equipment distribution and redistribution.

Delivery

For this policy and for the purposes of transparency it is the transfer of control and accountability of equipment to the component and/or the unit. A signed receipt document and/or automated transaction indicating the equipment is transferred and received is the criteria for considering the equipment delivered. Equipment not yet fielded but co-located at a unit or a component location does not constitute delivery.

Distribution Plans

Line Item Number level quantity allocations designated for specific units (below component level) normally at brigade, battalion and/or separate company level by month based on the availability of the equipment for delivery. Distributions must be consistent with component level allocations for HQDA G-8 managed equipment unless otherwise approved by the Director, Force Development. Distributed quantities for the near-term planning period are either on contract or on-hand.

Dynamic Army Resource Priority List (DARPL)

A document generated by the HQDA G-3 Force Management Directorate that provides detailed prioritization of specific units over time. It is published in both classified and unclassified versions.

Equipment Common Operating Picture (ECOP)

An automated program providing a “start to finish” Secret Internet Protocol Router Network (SIPRNet) web-based database to request and source specified ONS or ESD equipment for deployed and deploying units.

Equipping

The strategy, policy, procedures, ends, ways and means of providing required equipment to units. In the context of this policy it is the organization, policy and procedures of allocating and distributing equipment (new, recapitalized, reset, and redistribution of existing assets) in a collaborative closed loop process using the DST

Annex F – Terms of Reference to Army Equipping Roles, Responsibilities, Procedures, and Authorities

developed by LMI. PM item managers will provide disposition instructions for all Class VII equipment, to include approval for equipment turn-in.

Exempt LINs

HQDA managed LINs that will not be included in the designated Quarterly Allocation and Distribution update. HQDA G-8 FD (DOM and Director of Resources (DOR)), ICW ASA(ALT)/PMs and ASC, will make final approval of exempted LINs. A LIN can be considered for exemption due to the following reasons:

- LIN is combined with another LIN Plan. LINs are combined with existing plans when the Parent LIN is replacing the “Rolled or Child” LIN.
- LIN is procured by the EE PEG or SS PEG but does not have procurements that are expected to deliver in the EQUIPFOR 21 month period being updated.
- LINs on the HQDA LIN list that are determined to be unit funded requisition items and not centrally managed are exempt from having an EQUIPFOR Plan. These items are on the HQDA LIN list as critical shortage LINs.
- Other circumstances specific to the program that procures the LIN that prevent allocation and/or distribution planning.

Externally Sourced

Materiel transfers between ACOMs, ASCCs, DRUs and/or COMPOs.

HQDA G-8 Managed Equipment

A LIN centrally managed by HQDA G-8 during procurement, recapitalization, reset and COMPO allocation. AMC/ASC manages the ACOM/unit distribution of these LINs. Normally once procurement is complete, these LINs transition to AMC managed through sustainment. Although not the norm, HQDA may direct G-8 to centrally manage specific LINs through distribution due to extenuating circumstances.

Integrated Requirement Priority List (IRPL)

A classified document generated by HQDA G-3 Force Generation Division that provides Army prioritization of all force requirements (ground component commander and institutional) within each ARPL category. The IRPL is then used to produce the DARPL.

Internally Sourced

Materiel transfers that can be sourced completely within the command through redistribution of its assets within authorized levels.

Materiel Fielding Plan (MFP)

Serves as the program’s single standalone document containing the detailed plans, actions and responsibilities of the fielding, gaining and supporting commands to successfully field and deploy a materiel system with an objective of a fully manned, trained, and supported system. The MFP will also address any system or materiel being replaced and outlines how it will be transferred or retrograded. They should be provided to the gaining command/unit six months prior to equipment arriving to fielding site.

Materiel Fielding Team (MFT)

A PM Team specifically designed to accomplish the fielding.

Modernization Documentation Guidance: The G-3 FM report that uses DARPL, BOIPs (ASOIE & CMI) and the G-8 Modernization Documentation Recommendations to apply equipment requirements to unit authorization documents. A modified version of this report is sent to USAFMSA as Documentation Guidance supporting documentation IAW the Command Plan.

Modernization Documentation Recommendation: The G-8 materiel plan report to G-3 FM that contains by COMPO (Non UIC level of detail), Real On Hand Quantities, known distribution and future procurement quantities and allocations (accounts for DST new procurement distributions).

New procurement

All EE PEG initially procured equipment not previously in Army inventory.

Operational Needs Statement (ONS)

A request for a timely solution to an operational capability gap required for urgent missions that standard Army processes or procedures cannot provide.

Plan Owner

A system dependent designation. The AE2S EQUIPFOR Plan Owner for allocations is the SSO and AMC representative for AMC Critical items. Program Managers and AMC support the SSOs by providing monthly available quantities. The DST Plan Owner is the ASC designated representative who is responsible for the finalized plan that goes to LOGSA and which is shared with HQDA G-8 and others as the approved plan.

Proposed Sourcing Decision (PSD)

A DST-generated sourcing recommendation derived from matching validated, prioritized equipment demands with available Army inventory in depots, non-deployed units and other sources.

Recapitalized Equipment

This is EE PEG procured upgraded equipment that goes beyond refurbishment and rebuild and inserts additional capability. Some SS PEG funding may be supporting the recapitalization effort when equipment is first inducted to prepare the equipment for a capability insertion. Recapitalized equipment for allocation and distribution management is removed from unit property accountability through a supply transaction.

Redistribution

Line Item Number level quantity distribution of existing inventory already in units but determined to be excess to a unit or required elsewhere to meet higher priority requirements. Redistribution includes displaced equipment due to the allocation and distribution of new equipment to a unit and cascaded equipment. As required and per

Annex F – Terms of Reference to Army Equipping Roles, Responsibilities, Procedures, and Authorities

the LMI process, ACOM/ASCC/DRU will request disposition for identified excess or displaced equipment.

Requirement

An established need justifying the timely allocation of resources to achieve a capability to accomplish approved military objectives, missions or tasks (TRADOC Regulation (TR) 71-20, Concept Development, Capabilities Determination, and Capabilities Integration).

Reset

A set of actions to restore equipment to a desired level of combat capability commensurate with a unit's future mission. Reset reverses the effects of combat stress on equipment.

Synchronize

To bring together all stakeholder processes and relevant authoritative inputs in a distributed, collaborative manner to produce an integrated solution

Total Package Fielding (TPF)

The Army's standard materiel fielding process designed to provide Army materiel systems to the using units as a coordinated package of end items, support items, training and technical documentation.

Unit Distribution Plan (UDP)

A spreadsheet format containing information specific to a UIC, sortable by LIN, to include on-hand authorized MTOE/TDA equipment and a sourcing solution as a function over time. AMC/ASC (LMI) develops UDPs to equip units' IAW HQDA prioritization. The UDPs are then vetted with materiel stakeholders prior to execution.

Unit Equipping and Reuse Working Group (UERWG)

The ACOM/ASCC/DRU/COMPO led, ICW AMC/ASC, activities that are held at the unit's location or via Video Teleconference approximately 60 days after a unit returns from deployment or as requested. This working group brings all necessary organizations together at one time to assist the unit through re-equipping and to assist the unit in refining its Long Range Training Calendar (LRTC). This working group will address the unit's MTOE with a goal of synchronizing the units LRTC with New Equipment Training /New Equipment Fielding.