

CHANGE

U.S. DEPARTMENT OF TRANSPORTATION
FEDERAL AVIATION ADMINISTRATION

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CHG 1

9/18/08

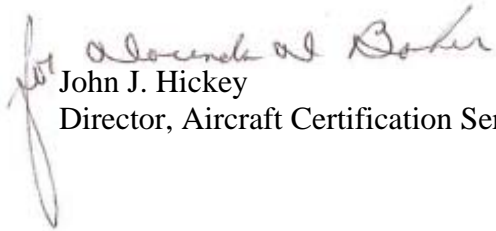
National Policy

SUBJ: Organization Designation Authorization Procedures

1. **Purpose.** This change incorporates the following training requirements for Organization Designation Authorization (ODA) administrators and Organization Management Team (OMT) members:
 - a. Paragraph 3-10b(1) clarifies that ODA administrators must attend ODA applicant training before appointment and a delegation workshop every 24 months.
 - b. Paragraph 5-1 is revised to replace bullets with paragraph identifiers.
 - b. Paragraph 5-2e is added and requires that OMT members and their managers attend FAA academy training as currently required in Order 8000.93 and that OMT leads attend a delegation workshop at least every 24 months.
2. **Who this change affects.** This change affects FAA personnel serving as an OMT member and applicants for ODA.
3. **Disposition of Transmittal Paragraph.** Retain this transmittal sheet until the directive is cancelled by a new directive.

PAGE CHANGE CONTROL CHART

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3-10. TRAINING.

a. ODA Holder-Provided Training. An ODA holder must provide training to its ODA administrator and unit members to ensure continued compliance with the approved procedures manual, the regulations, and applicable FAA policies. An ODA holder must provide this training before authorizing an ODA unit member to perform a delegated function. ODA unit members must receive this training at least every two years. An ODA holder must allow the FAA to review the training materials and attend any training session. An ODA holder must incorporate changes to the training material as required by the FAA. The training must explain:

- (1) The functions delegated to the authorization.
- (2) The ODA holder's processes, and its procedures manual.
- (3) The ODA unit member's authority and responsibility when performing authorized functions.
- (4) Applicable FAA regulations, policy, and guidance material.

Temporary or limited use ODA unit members are only required to receive that ODA holder training commensurate with their involvement in the project. For example, an engineering ODA unit member performing a burn test or manufacturing ODA unit member performing specific part conformity inspections at a supplier location would not need training on all of the organization's functions and procedures. The ODA holder must provide the ODA unit member sufficient training on the specific procedures related to the ODA unit member's functions.

b. FAA Seminars. Each ODA unit member, in addition to the ODA holder's training, must attend the following FAA-sponsored training:

(1) Each ODA lead administrator must attend ODA applicant training prior to appointment and a delegation workshop at least every 24 months.

(2) Each ODA unit member must attend FAA training seminars. This includes those seminars that individual designees performing similar functions are required to take by other FAA Orders, such as FAA Order 8100.8 or FAA Order 8130.33, Designated Airworthiness Representatives: Amateur-Built and Light-Sport Aircraft Certification Functions. Additionally, ODA unit members performing functions specific to an ODA, such as evaluation of production limitation record changes, must attend seminars as required by the OMT.

c. Standardization Workshops. If required by the OMT, ODA unit members must attend FAA standardization workshops. Standardization workshops are subject-specific and usually developed and presented by FAA personnel or industry personnel as needed.

3-11. DURATION OF APPOINTMENT. An ODA is effective until the expiration date listed on the letter of designation. See paragraphs 4-5 and 5-8 of this order for guidance on the allowed duration of an appointment.

a. Transferability. An ODA is not transferable.

b. Change in Ownership. A change in ownership of the ODA holder which results only in a name change with no change in organizational structure, etc., may be executed by reissuing the ODA letter of designation and the MOU, along with revising the procedures manual to reflect the new name.

c. Change to the ODA Unit. A change in the ODA unit that involves ODA administrators, structure within the ODA holder, or changes to the ODA holder or ODA unit, may change an organization's eligibility for ODA. The ODA holder must notify its OMT lead of anticipated organizational changes to determine whether the changes will impact the authorization and how they will be handled.

3-12. CONTINUED ELIGIBILITY. To maintain eligibility, an ODA holder must:

a. Notify the OMT lead within 48 hours of any change that would affect the ODA holder's ability to meet the requirements of its authorization. A notification due on Saturday, Sunday, or a holiday may be delivered on the next working day.

b. Comply with the requirements in its approved procedures manual.

c. Maintain a staff of qualified ODA unit members.

d. Implement corrective and remedial action for deficiencies identified by the FAA.

e. Not perform an authorized function if a change in the facilities, resources, or organizational structure affects how the ODA holder performs that function. This includes a move to a new location or the inability of the ODA holder to accommodate the ODA unit or records needed to perform the authorized function. The ODA holder may perform that function only after it notifies the OMT lead of the change, and the OMT documents and approves the change as required in the ODA holder's procedures manual.

f. If an ODA holder's basis of eligibility is a PC, the ODA holder cannot perform any authorized function if it moves its principal manufacturing facility or adds another facility. The ODA holder must notify the OMT of the change in accordance with 14 CFR §21.147 since a PC is not transferable (see 14 CFR §21.155). In this case, the company would have to apply for a PC extension or a new PC in accordance with 14 CFR §21.133.

g. If an ODA holder's basis of eligibility is a PMA, the ODA holder cannot perform any authorized function if it moves its principal manufacturing facility or adds another facility. The ODA holder must notify the OMT of the change in accordance with 14 CFR §21.303. In this case, the company would have to apply for a new PMA or an extension to its production approval.

h. If an ODA holder's basis of eligibility is a TSOA, the ODA holder cannot perform any authorized function if it moves its principal manufacturing facility or adds another facility. The ODA holder must notify the OMT of the change since a TSOA is not transferable in accordance with 14 CFR §21.621. In this case, the company would have to apply for TSOA in accordance with 14 CFR §21.607.

CHAPTER 5. OVERSIGHT

5-1. OVERSIGHT PROGRAM. The FAA's oversight program for delegated organizations is based on a systems approach to managing and supervising an organization. Oversight consists of supervision, addressed here, and inspections, which are addressed in chapter 6. We will focus on how an organization performs and its approved systems and procedures. We will oversee the organization as necessary to ensure that it performs adequately. The oversight program includes supervising and evaluating an organization's:

- a. System, personnel, and procedures;
- b. Projects and activities; and
- c. Overall performance.

5-2. ORGANIZATION MANAGEMENT TEAM (OMT). An OMT of FAA personnel oversees the ODA holder. The OMT includes members of the Aircraft Certification and Flight Standards field offices and AEG as needed to oversee the ODA holder. Participation will vary depending on the functions the ODA holder is authorized to perform. The OMT members must be knowledgeable and experienced in the functions the ODA unit performs.

a. The OMT lead coordinates the OMT's activity and serves as the focal point for communication with the ODA holder. The manager of the appointing office (see figure 4-1 of this order) selects the OMT lead.

b. An ACO's OMT members oversee all design approval and type certification procedures. The ACO also oversees the engineering and flight test functions performed by the ODA unit. The OMT must include ACO engineers from all authorized technical disciplines.

c. Manufacturing and Flight Standards OMT members oversee the authorized inspection and airworthiness procedures and functions. In addition, the Flight Standards OMT member will inform the OMT of any applicable change in the ratings or limitations of the ODA holder's repair station or operator certificates.

d. An AEG representative is responsible for acceptance of Instructions for Continued Airworthiness (ICA) and maintenance and operational issues on certification projects.

e. The OMT must attend the following training to ensure they have the appropriate knowledge to manage the organization.

(1) The OMT members must attend FAA Academy Course No. 23005, Designee Management for AIR & AFS, or equivalent as provided for in Order 8000.93, Aircraft Certification Service National Technical Training Plan. Individuals that have more than 1 year of experience working for the FAA who have not attended the required course may serve on the OMT if assigned a mentor from within their office that has attended. The mentor will assist the OMT member on ODA oversight issues.

(2) The OMT members must attend recurrent FAA designee seminars as required by Order 8100.8 that are relevant to the discipline within the ODA that they oversee as an OMT member. Engineering and flight test OMT members must attend these seminars every 4 years, inspection and airworthiness OMT members must attend every 3 years. If an OMT member does not oversee specific technical functions, the OMT member may choose which seminar sessions to attend.

(3) The managers of OMT members must receive the FAA Academy Briefing "Managing AVS Delegation Specialists," item number 27200012.

5-3. SUPERVISION OVERVIEW. In supervising an ODA holder, the OMT guides, manages, and provides performance feedback to the ODA holder. Supervision involves the FAA working and interacting with the ODA unit. Supervision consists of the following:

a. Managing the Organization's Activity.

(1) **Defining and Understanding the Authority and Limitations of the Organization.** The procedures manual defines an ODA holder's authority and limitations. The ODA holder's authority and limitations determine the functions it may perform. The OMT must ensure that the ODA holder's authority and limitations continue to be appropriate based on the organization's capability, experience, and history.

(2) **Approving the Organization's Procedures.** By approving the procedures, the OMT ensures that the functions performed by the organization result in products and approvals that comply with FAA regulations and policies. The OMT must:

(a) **Approve Procedures Manual Changes.** Procedures manual changes address the authority or limitations of the organization, the organization's system model, or changes in the procedures for performing authorized functions. The OMT must approve procedures manual changes before the ODA holder implements them.

(b) **Ensure ODA Unit Members Are Approved.** The OMT must ensure that the ODA holder follows its procedures for selecting ODA unit members. The procedures must follow the process defined in paragraph 3-13 of this order.

(3) **Managing Program Activity.** For TC, STC, and PMA programs, the final step in authorizing certification activity is the OMT review of the program notification letter. The OMT must determine whether the ODA holder may perform its authorized functions on a particular project. The OMT must review each program notification letter and determine what FAA involvement is required. The OMT may delegate all aspects of the program, or retain some parts for FAA approval as it determines necessary.

b. Guidance and Feedback.

(1) **Providing Guidance.** The OMT will help each ODA holder get required directive and policy material. Most FAA regulations, directives, and ACs of interest to ODA holders are available on the FAA's website. The OMT should provide copies of any needed material not

available via the Internet. The OMT must ensure the ODA holder has the information and instruction necessary for it to perform its authorized functions.

(2) Feedback. The OMT must provide feedback to the ODA holder about its performance. The OMT should notify the organization of any problems with its performance as soon as possible. If the feedback requires corrective action, the OMT must notify the ODA holder as described in paragraph 5-6 of this order.

c. Assessing Performance.

(1) Review of the Organization's Work. As determined necessary, the OMT must review the ODA unit's work and data for accuracy and completeness. The OMT will take into consideration the amount of the review on the organization's experience, the safety impact of the work being reviewed, the quality of work performed on previous projects, and the ODA unit member performing the function. Previous service difficulties should be considered when deciding the amount of review needed. The OMT must review samples of completed project records, such as airworthiness, conformity, compliance, and type design data. If the OMT requires personal meetings or inspections with the ODA holder or unit, it should coordinate them through the ODA administrator.

(2) Review of Self-Audits. The OMT must review the self-audit reports generated by the ODA holder for possible trends and items requiring corrective action. The OMT lead must coordinate the review with the other OMT members, and coordinate corrective actions in accordance with paragraph 5-6 of this order if necessary. The OMT must ensure that self-audits address all of the ODA holder's authorized functions, and that the ODA holder performs them annually.

(3) Verifying compliance with procedures. The OMT must verify that the authorization holder complies with the approved procedures manual and referenced internal processes.

d. Maintaining Oversight Documentation. Proper documentation provides the OMT with the information it needs to oversee the organization properly. Documentation also provides a history of the organization's performance, in case OMT members change or the ODA holder seeks additional authority.

(1) The OMT lead will maintain a file for each authorization he manages. (The OMT members must provide any records not available to the OMT lead.) The file must contain at least the following as applicable:

(a) Approved ODA application package.

(b) Evaluation Panel documentation and rationale.

(c) Copy of the letter of designation and memorandum of understanding.

(d) General correspondence (non-project-specific) between the ODA holder and the OMT.

- (e) Copy of the current procedures manual.
- (f) Delegated organization supervision records and inspection reports.
- (g) Copy of summary activity reports (if applicable).
- (h) Enforcement history.
- (i) Self audit reports.
- (j) Copies of the organization's A-3 operations specifications showing the status of ratings, limitations, and capabilities list (repair stations and operators).

(2) The other OMT members must maintain a file documenting their specific activity in support of the OMT. Their files should include:

- (a) Supervision records.
- (b) Documentation of their input regarding projects performed by the organization.

5-4. SUPERVISION. The level of supervision depends on the ODA holder's experience, history, and past performance as well as the technical complexity and safety impact of the functions or projects it performs. The OMT members must complete the Delegated Organization Supervision Record (see appendix 1, figure 13 of this order) to document their supervision activities.

a. Required Evaluation Items. The OMT must assess annually the required evaluation items on the Delegated Organization Supervision Record. The OMT should meet and budget annually to establish a strategy for assessment of those items. The strategy should consider which OMT members will assess each item.

b. Coordinating Supervision Activity. The OMT lead will coordinate all supervision activity. The type of coordination will vary depending on the size and complexity of the ODA holder and OMT. If the OMT consists of only a few people, it may be appropriate to inform all OMT members of any activity related to the organization. For larger OMTs, like those overseeing TC ODA holders, it may be more practical to coordinate within technical disciplines, which would report their activity and findings to the OMT lead. The entire OMT will decide exactly how it will coordinate its supervision activity. Regardless of the arrangement, the OMT members must provide the OMT lead with supervision records documenting their supervision visits to the organization.

c. Planning Supervision Visits. Each OMT member should notify the OMT lead of any planned supervision activity at the organization's facility. The OMT lead should notify the ODA administrator of the planned visit. If the OMT has issues with any approvals issued by the organization or other performance issues, the OMT should coordinate them with the ODA administrator. If necessary, the OMT may make unannounced visits.

d. Engineering Supervision. Engineering OMT representatives can accomplish most of their supervision activity by reviewing data. This may not require on-site visits to the

organization's facility. The OMT will determine the number of visits needed. At least one engineering OMT representative must make at least one supervision visit to the ODA holder's facility each year, in addition to the inspection requirements of chapter 6. The OMT member may combine this supervision visit with specific project activity, such as witnessing tests or participating in flight tests. However, the focus of the visit must be for the OMT member to:

(1) Review approved test plans and data such as compliance substantiation and type design data.

(2) Discuss self-audit results.

(3) Review implemented corrective actions.

(4) Review project files.

(5) Review internal training and training records.

(6) Review ODA unit member selection decisions and records.

(7) Provide the latest guidance and policy.

(8) Interact with the ODA unit members.

e. Manufacturing Supervision. Manufacturing OMT representatives oversee manufacturing activity primarily through direct interaction with the ODA unit, which requires visiting the ODA holder's facility. They can tailor the number of visits to the facility, but must visit the ODA holder at least once a year. These visits are in addition to the inspection requirements of chapter 6. They should base the number of visits on the ODA unit's experience and effectiveness of previous certification efforts. The frequency of visits will depend on the size of the organization, level of activity, and past performance. For smaller ODA holders or those with a low-level activity or no performance problems, manufacturing OMT representatives may need only one or two visits a year. Quarterly visits may be more appropriate for ODA holder's with increased complexity. During the visit, the manufacturing OMT member will:

(1) Determine compliance with regulatory requirements.

(2) Identify safety issues.

(3) Observe ODA unit members performing airworthiness or conformity inspections.

(4) Discuss self-audit results.

(5) Review implemented corrective actions.

(6) Review project files.

(7) Review internal training and training records.

- (8) Review ODA unit member selection decisions and records.
- (9) Provide the latest guidance and policy.
- (10) Interact with the ODA unit members.

f. Flight Standards Supervision. The Flight Standards OMT representatives oversee the maintenance and operational activity through direct interaction with the organization. This requires visiting the organization. The minimum number of visits will be identified through the National Work Program and may be tailored based on the ODA holder's activity level. These visits may be performed in conjunction with other surveillance activity. During the visits to the facility, the Flight Standards OMT member will:

- (1) Determine compliance with regulatory requirements.
- (2) Identify safety issues.
- (3) Observe ODA unit members performing aging aircraft, airworthiness or conformity inspections.
- (4) Discuss self-audit results.
- (5) Review implemented corrective actions.
- (6) Review certification files.
- (7) Review internal training and training records.
- (8) Review ODA unit member selection decisions and records.
- (9) Provide the latest guidance and policy.
- (10) Interact with the ODA unit members.

g. Aircraft Evaluation Group Supervision. The AEG's primary activities are to coordinate and review the Instructions for Continued Airworthiness, and support the ACO in determining operational suitability. Since the FAA does not delegate AEG functions to the organization, supervision activity by the AEG is usually limited to its participation during the certification program. The AEG will not normally visit the facility other than during inspections, but may do so if they determine a visit is necessary.

h. Documenting Supervision. The OMT will document supervision activity and significant communications with the ODA holder using the Delegated Organization Supervision Record in appendix 1, figure 13 of this order. The record is used to document both general supervision activity and any unsatisfactory performance.

(1) Required Evaluation Items. The OMT must evaluate the applicable items listed on the record at least once a year. Each OMT member must evaluate each of the items applicable to his technical discipline. Not every interaction with the ODA holder needs to be

recorded, but every supervision visit to the organization's facility must be recorded. The OMT member performing the supervision should rate each item assessed as satisfactory, unsatisfactory, or not applicable. If an evaluation item is not assessed during the activity, leave the item blank. Corrective action must be implemented for all items rated as unsatisfactory.

(2) Text Blocks on Back of Form.

(a) Summary of Visit or Communication. Provide a summary of activity performed during any visit or important communications with the organization not otherwise documented. For visits, the summary should include details on how the evaluation items were assessed.

(b) Notable Conditions Encountered. A notable condition is any item or condition of interest that does not require corrective action, but warrants documentation. Highlight the notable conditions found. These may be items to assess during the next visit, or areas of interest to other OMT members.

(c) Items Requiring Corrective Action. Describe any evaluation item rated as unsatisfactory, or any other condition determined to need corrective action. Provide specific details of any unsatisfactory condition and check the box on the front page indicating corrective

action is required. The OMT lead must coordinate with the other OMT members regarding items identified as needing corrective action. If the OMT lead concurs that corrective action is required, he must notify the ODA holder in accordance with paragraph 5-6 of this order.

(3) Coordinating Supervision Visit Findings. The OMT member performing the supervision activity should communicate his observations with the ODA administrator (if possible) and any ODA unit members involved in the reviewed activity. The ODA administrator should be told of any items identified as needing corrective action and informed that he will be further notified of such items.

5-5. DELEGATED ORGANIZATION INSPECTION PROGRAM. Under the inspection program described in chapter 6, the OMT inspects all aspects of the ODA holder's performance. It assesses both system-level procedures and compliance, how the ODA holder manages the ODA unit, and the ODA unit's technical proficiency and judgment. The inspection is a means for the OMT to assess whether:

- The ODA holder's procedures are adequate,
- The ODA unit has complied with the procedures, and
- The ODA unit makes technical decisions that are acceptable.

5-6. CORRECTIVE ACTION. The OMT must ensure the ODA holder takes corrective action to address non-compliances and problems with the organization's procedures or performance.

a. Regulatory Non-compliances. The OMT lead must notify the ODA holder of any violations of the regulations (other than non-compliances with the airworthiness standards), in accordance with FAA Order 2150.3.

NOTE: The OMT lead must be familiar with the FAA's compliance and enforcement program and must attend the FAA's compliance and enforcement training. If he has not, he must coordinate any compliance and enforcement activity with other members of the OMT who are familiar with the program's requirements. Manufacturing and flight standards OMT members usually have experience with compliance and enforcement procedures.

b. Non-compliance with the Airworthiness Standards and Potentially Unsafe Conditions. If an ODA unit approval or certificate results in a potentially unsafe product or a product not meeting the airworthiness standards, the OMT lead must immediately notify the organization of the unsafe condition or non-compliance and:

(1) Assess how the condition affects safety to determine whether we will issue an airworthiness directive (AD) to correct the condition on products in service.

(2) Pursue AD action if necessary.

NOTE: The FAA uses the AD process to mandate product changes or repairs for unsafe conditions. If a non-compliant condition in a product does not result in an unsafe condition, the OMT may ask the organization to correct the condition. The OMT must document when the ODA holder does not take corrective action for non-compliant conditions. The OMT will consider this when assessing the ODA holder's performance.

(3) Require the ODA holder to:

(a) Determine the cause of the condition.

(b) Determine whether the problem is systemic or isolated in nature.

(c) Review the procedures that led to the approval and determine if the procedures are adequate and if qualified ODA unit members performed them.

(d) Develop any proposed corrective or remedial action.

(e) Submit its determination of the cause of the condition and proposed remedial action within 30 calendar days.

(4) Evaluate the cause of the condition and proposed remedial action in conjunction with the ODA holder as warranted.

(5) Verify that appropriate corrective or remedial action is implemented.

c. Other Conditions Requiring Corrective Action. The OMT lead will notify the ODA holder of any condition requiring corrective action. The OMT must document the condition on a supervision record or inspection report in the FAA's files and notify the ODA holder of the item in writing. The OMT must notify the ODA holder within 30 calendar days of identifying the condition. The ODA holder must submit its determination of the cause of the condition and

proposed remedial action within 30 calendar days. The OMT lead must retain the organization's response and any related correspondence in the OMT's files.

d. Following Up on Corrective Action. The OMT must ensure the ODA holder implements corrective action. All corrective action must be verified during a visit to the facility. The OMT will track and re-evaluate all items requiring corrective action after the ODA holder takes corrective action.

5-7. GEOGRAPHIC COORDINATION. FAA personnel may need to oversee ODA holders with facilities in different geographic areas. The OMT lead will coordinate with the FAA offices having geographic responsibility. The geographic FAA office will supervise at the additional facility, if necessary.

5-8. ODA RENEWAL.

a. Renewal Intervals. The FAA will appoint a new ODA holder for two years. At renewal, the OMT must determine whether the ODA holder continues to comply with the requirements for delegation and the need for the authorization continues. The OMT may re-appoint for a period of two to five years. The OMT will select the duration based on its experience with the ODA holder and the complexity of approvals.

b. Request for Renewal. An ODA holder must submit a letter requesting renewal of its ODA at least 60 calendar days prior to expiration. If the ODA holder does not request renewal, the OMT should initiate termination action. The renewal letter must include an overview of the activity performed under the ODA, and identify any increase in activity planned for the next renewal period. If the ODA holder seeks additional functions under the ODA or a different type of ODA, they must apply for the changes in accordance with chapter 3 of this order.

c. OMT Renewal Responsibilities: When it receives a request for renewal, the OMT must evaluate the performance of the ODA holder to confirm that it is performing satisfactorily. The OMT should consider the following for renewal.

(1) Review of ODA Holder's Performance.

(a) Through its continual oversight of the ODA holder, the OMT will be aware of any performance issues. The ODA holder must be technically proficient in all authorized areas and require a level of oversight commensurate with the value the ODA holder provides to the FAA.

(b) The OMT must ensure corrective action has been implemented for each identified deficiency. The ODA holder must have a history of implementing timely corrective action for any issues identified by the OMT. The ODA holder must show a willingness to do this and be proactive in incorporating improvements into its ODA system.

(c) The OMT should review the supervision records generated during the evaluation period to ensure the ODA holder performed satisfactorily and to verify corrective action was implemented.

(2) Determine Need and Ability to Manage.

(a) The OMT will consider the amount of activity by the ODA unit to confirm that continued delegation to the organization is of benefit to the FAA.

(b) The OMT must also consider the level of oversight required by the ODA holder. If the ODA holder requires a level of oversight greater than the benefit provided to the FAA, or the managing offices lack the resources to manage the ODA holder, then the OMT should initiate steps to terminate the authorization.

d. Re-issuance of Authorization. If the OMT determines that an ODA holder is functioning satisfactorily, and there is a continuing need and ability to manage, the OMT will issue a new letter of designation after completing a new MOU with the organization. If the performance or activity level does not warrant renewal, the OMT will initiate suspension or termination procedures in accordance with chapter 7 of this order.