

# HNC PROC 2020

## Team Establishment

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### Scope

This process defines steps necessary to establish the Project Delivery Team (PDT), which includes the customer. This same process will be used to establish necessary Independent Technical Review Teams (ITRT).

### Policy

[ER 5-1-11, U. S. Army Corps of Engineers Business Process.](#)

### Responsibility

The Project Manager (PM) is responsible for:

- Initiating and leading the Project Delivery Team (PDT), which includes the customer.
- Ensuring that necessary Independent Technical Review Teams (ITRT) meet and adequately review PDT products.
- Identifying, during the planning stage, all areas of expertise needed for both the PDT and the necessary ITRTs, and involving them throughout the lifecycle of the Project. This will be accomplished in coordination with Resource Providers.
- Effectively organizing the team.

The Resource Provider(s) is responsible for:

- Supporting the Project and assisting the PM by identifying expertise needed and assigning team members to both the PDT and ITRTs. (Team members could be from various sources: in-house, contract or other organizations.)
- Ensuring that assigned staff and contractors support the PM and the PDT.
- Providing technical information, consultation and advice to the Project team.
- Providing responsible charge, supervision and oversight of technical products produced by the PDT and ITRT members.

- Mentoring and supporting their assigned team members, and maintaining the integrity of the original PDT to the greatest extent possible.

The Project Delivery Team (PDT) is responsible for accomplishing commitments they make to the Project.

The Independent Technical Review Team is responsible for accomplishing commitments they make to the Project.

## **Distribution**

Independent Technical Review Team (ITRT)

Project Delivery Team (PDT)

Project Manager (PM)

Resource Provider(s)

## **Ownership**

The Office of the Deputy for Programs and Technical Management ( DPTM) is responsible for ensuring that this document is necessary, that it reflects actual practice, and that it supports corporate policy.

## **System References**

[Acronyms and Glossary – REF8000G](#)

[Centers of Expertise \(CX\) Website -](#)

[Change Management – HNC PROC 3010](#)

[Project Scope and Customer Requirements Definition – HNC PROC 2010](#)

[HNC Workload Analysis and Resource Leveling – HNC PROC 1020](#)

[Earned Value Management – REF8018G](#)

[PMP/PgMP Content – REF8005G](#)

[PMP/PgMP Development – HNC PROC 2000](#)

[Project \(Program\) Delivery Acquisition Plan – HNC PROC 2050](#)

## Activity Preface

This process is performed during [PMP/PgMP Development – HNC PROC 2000](#), once the Project scope and customer requirements definition have been identified. (Also, this process will apply when a member of the PDT or ITRT is added or replaced.) A resource in the context of this process is defined as a representative from within the Center, another office within the USACE, external sources or other agencies. Resources obtained via contract are addressed in [Project \(Program\) Delivery Acquisition Plan – HNC PROC 2050](#).

The PM may request a specific individual from a Resource Provider based on that individual's unique talents or experience on a Project. The Resource Provider will take the PM's request into consideration when making an assignment to a Project. In making assignments, the Resource Provider will perform [HNC Workload Analysis and Resource Leveling – HNC PROC 1020](#) to verify availability of resources.

If the PM and the Resource Provider are unable to find, or agree on, the appropriate resource for a Project, the issue will be raised through the chain of command within the Center. If the resource is unavailable at the Center, a resource will be sought from other USACE Resource Providers or expanded to external sources and other agencies. Consideration of resources will include evaluation of Centers of Expertise (CX), some of which are mandatory.

Once a resource is committed to a Project, the Resource Provider cannot change that commitment without consulting with the PM. The Resource Provider will help resolve resource conflicts as the result of any changed commitments. The Resource Provider retains all supervisory control over their employees. Changing a resource commitment during Project execution may be a threshold that causes [Change Management – HNC PROC 3010](#) to be executed.

The PM will ensure the team members are entered into P2. After the team members are entered into P2, the process returns to [PMP/PgMP Development – HNC PROC 2000](#).

### Project Manager (PM)

1. Inform customer that the PDT (or an ITRT) is being established and request representation.

**(Concurrent with informing customer, proceed to Task #4.)**

### Customer

2. Receive request for PDT representative.

3. Designate representative for PDT and inform PM.

**Go to Task #9.**

### Project Manager (PM)

4. Evaluate and provide preliminary project data to the Resource Providers.

This may include a synopsis of the SOW, preliminary schedule and budget data. Additional information may be provided based on professional experience and data from similar type products.

5. Request Resource Providers designate support personnel for PDT.

### Resource Provider(s)

6. Receive preliminary Project data and request for PDT personnel.
7. Review preliminary Project data and determine resources required.

PM's may request specific team members that they believe would add unique value to a specific Project.

PM and Resource Providers should consider team dynamics in balancing strengths and limitations of the requested PDT/ITRT members.

If specific members are requested by name, or a PM or Resource Provider request that a PDT/ITRT member be replaced, then the Resource Provider(s) or PM should try to accommodate the request, but must balance workload and prior commitments to avoid over-committing individual team members.

Consult with any required support organizations for regulatory requirements and/or items affecting Project execution.

**Stop and complete [HNC Workload Analysis and Resource Leveling – HNC PROC 1020](#).**

8. Establish recommended team PDT membership and advise PM.

### Project Manager (PM)

9. Receive PDT nominations.

**If both PM and Resource Provider(s) agree on available resources, go to Task #11. Otherwise, go to Task #10.**

10. Resolve PDT Issues within HNC or externally as appropriate.

If team member issues cannot be resolved within HNC then search for appropriate resources throughout USACE, other agencies or other outside sources.

**When the resources are identified go to Task #11.**

11. Evaluate requirements for supplemental experts from Centers of Expertise. (refer to [ER-1110-1-8158](#))

**If Supplemental Expertise is required, go to Task #12. Otherwise go to Task #13.**

12. Contact appropriate Agencies or other outside sources for supplemental experts.

13. Establish PDT/ITRT documenting team members in P2, and notify members of assignments.

Team member assignments (especially the PM) remain constant throughout the life of the project, if at all possible. Also, USACE activities will make every effort to maintain original team members through the lifecycle of the project, making substitutions only when necessary or required to maintain a competent, qualified workforce.

Note: a change in one or more team members may be a threshold in [Change Management – HNC PROC 3010](#) for returning to [PMP/PgMP Development – HNC PROC 2000](#).

**End of activity.**

**Return to [PMP/PgMP Development – HNC PROC 2000](#).**

