

Team Establishment

Scope

This process defines steps necessary to establish the Project Delivery Team (PDT) which includes the customer.

Policy

ER 5-1-11[<http://www.usace.army.mil/inet/usace-docs/eng-regs/er5-1-11/entire.pdf>]

ER 37-1-26[<http://www.usace.army.mil/inet/usace-docs/eng-regs/er37-1-26/entire.pdf>]

Responsibility

The Project Manager (PM) is responsible for initiating and leading the Project Delivery Team (PDT) which includes the customer. The PM, in coordination with resource providers, -will make every effort to identify all functional areas of expertise needed for project success during the planning stage, and to involve them throughout the lifecycle of the project.

The Resource Providers The Resource Providers support the project and assist the PM by identifying expertise needed and assigning team members to the project delivery team. They are also responsible for ensuring that assigned staff and contractors support the PM and the project team; providing technical information, consultation and advice to the project team; and providing responsible charge, supervision and oversight of technical products produced by the PDT members. They are also responsible for maintaining the integrity of the original PDT to the greatest extent possible~~assist the PM by identifying team members for the project.~~ They are also responsible for mentoring and supporting their assigned team members, and for maintaining the integrity of the original PDT to the greatest extent possible.

Both PMs/PDTs members and Resource Providers are responsible and accountable for, and empowered to keep commitments they make in to the project management plan.

Distribution

Project Manager (PM)*

Resource Provider(s)*

Project Delivery Team

Ownership

The BP/P2 Program Configuration Management Board Office 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[REF1001]

Change Management[PROC1004]

Customer Scope Definition[PROC1007]

PMP Development[PROC1012]

PMP/PgMP Content[REF1018]

Project Delivery Acquisition Strategy[PROC1020]

Project Workload Analysis and Resource Leveling[PROC1014]

Activity Preface

This process is performed during *PMP Development[PROC1012]*, once the customer and project scope have been identified, and when ~~ever~~ a member of the PDT is added or replaced. A resource in the context of this process is defined as ~~an individual~~ a representative from within a District/Lab/Center, ~~or~~ another office within the ~~region~~ USACE, or other agencies. Resources obtained via contract are addressed in *Project Delivery Acquisition Strategy[PROC1020]*.

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 *Project Workload Analysis and Resource Leveling[PROC1014]* 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 District/Lab/Center. If the resource is unavailable at the District/Lab/Center, a resource will be sought from within ~~the~~ region USACE and other agencies.

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 ~~is~~ may be a threshold that causes *Change Management[PROC1004]* to execute.

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The PM will ~~enter-ensure~~ the team members ~~are entered~~ into P2, ~~giving them the level of access needed to perform their functions within the system~~. After the team members are entered into P2, the process returns to PMP Development[PROC1012].

Project Manager (PM)

- ~~1. Inform customer that team is being established or modified. Evaluate deliverables defined in scope of work of the project to determine what expertise is required on the project team.~~
2. Provide basic scope of work, preliminary schedule, and preliminary project budget information from Customer Scope Requirements Definition (PROC1007) to the resource providers.

~~The p~~Preliminary schedule and project budget information is based ~~may be augmented by data and professional~~ ~~on~~ ~~experience with~~ ~~from~~ projects of similar scope and complexity.

- ~~3. Request personnel for functions to be performed.~~

~~PM may request specific team members that s/he believes would add unique value to a specific project.~~

~~PM should try to balance strengths and limitations of the requested PDT members.~~

Resource Provider(s), Project Manager (PM)

- ~~4. Review information provided by PM. Jointly evaluate deliverables defined in the scope of the project to determine what expertise and time commitments are required on the project team.~~

~~5. Determine expertise required and time commitment needed. PM may request specific team members that s/he believes 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 members.

If specific members are requested by name or a PM or Resource Provider request that a PDT 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 **Project Workload Analysis and Resource Leveling[PROC1014]**.

~~If specific members are requested by name, then the Resource Provider(s) should try to accommodate the request, but must balance workload and prior commitments to avoid over-committing individual team members.~~

- ~~6. Establish recommended team membership. Inform PM of team member(s) nominations to support the project.~~

~~ER 5-1-11 states that Resource provider(s) are responsible for providing qualified PDT members.~~

- ~~7. Request PM's concurrence.~~

Project Manager (PM), Resource Provider(s)

If both PM and Resource Provider(s) agree on available resources, goto task #10. Otherwise, goto task #8.

8. Elevate issue within district/lab/center as appropriate.

If team member issue resolved, goto task #10. Otherwise, goto task #9.

9. Search for appropriate resources ~~throughout the region.~~

If there are insufficient resources available locally with the requisite capabilities, then the PM/Resource Provider(s) will look throughout ~~the region~~ USACE and other agencies.

Project Manager (PM)

10. ~~Establish-Document~~ Project Delivery Team (PDT) by entering team members into P2.

Send notification to team members.

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 ~~absolutely~~ necessary or required to maintain a competent, qualified workforce.

Note: a change in one or more team members ~~is~~ may be a threshold in Change Management[PROC1004] for returning to PMP Development[PROC1012].

End of activity.

