

Project Workload Analysis and Resource Leveling

Change Project to District/Center

Scope

This process defines ~~the means by which~~ an approach to assist Project Managers (PM), Resource Providers, Middle Management Team, Project Review Board (PRB), and Corporate Board, ~~and Regional Management Board (RMB)~~ accomplish resource planning for the current fiscal year (CFY). ~~All but the RMB will also use this process~~ for the budget year (BY) and the year beyond the budget year (BY+1). ~~For BY and BY+1, the~~ Regional Management Board (RMB) will use Command Workload Analysis & Resource Leveling[PROC1024].

Projections of an organization's BY and BY+1 activities will be estimated based on best available information which may not be fully developed. ~~Nevertheless, e~~Even a rough estimate based on PMPs and PgMPs, or other written documents will be worthwhile in anticipating workload in the ~~outyears~~ future years and therefore useful in the analysis.

A resource in the context of this process is defined as a representative from within a District/Lab/Center, another office within the USACE, or other agencies. Resources obtained via contract are addressed in Project Delivery Acquisition Strategy[PROC1020].

Policy

Consolidated Command Guidance[<http://www.usace.army.mil/inet/functions/rm/regs/regs.htm>]

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 Business Management Office (BMO), in support of the Regional Management Board, is responsible for extracting Division workload and resource data for CFY, BY, and BY+1 from P2 and analyzing foreseeable workload/resource problems for organizations or functions deviating from the limits on the Quarterly Trigger Values Chart in the Standard and Recommended Computations for Workload Analysis and Resource Leveling[REF1008]. They are also~~

~~responsible for communicating and documenting all RMB decisions made by both the RMB and the MSC Commander.~~

Resource Providers are responsible for extracting data from P2 to analyze scope, methods of accomplishment, cost and distribution for activities identified by project delivery teams in CFY, BY, and BY+1. They are also responsible for ensuring adequate resources are available to meet the mission requirements and assigning roles to individual resources.

The Middle Management Team, Corporate Board and/or Project Review Board, and Corporate Board ~~is are~~ responsible for ~~deciding all unresolved~~analyzing district workload and resolving resource conflicts between the PM and Resource Providers.

~~The Project Delivery Team (PDT) is responsible for developing project data to a functional or lowest organizational level for CFY, BY, and BY+1. P3e provides capability to assign a role to each individual resource assignment.~~

~~Resource Providers are responsible for extracting data from P2 to analyze and determine scope, methods of accomplishment, cost & distribution for activities identified by project delivery teams in CFY, BY, and BY+1. They are also responsible for ensuring adequate resources are available to meet the mission requirements and assigning roles to individual resources.~~

The Regional Management Board (RMB) is responsible for resolving CFY resource conflicts referred by Corporate Boards. In addition, under Command Workload Analysis & Resource Leveling[PROC1024], the RMB is responsible for developing strategic plans regarding ~~personnel acquisition or dismissal~~staffing, contract type and quantity, development of regional centers of expertise, etc, in order to posture the Regional Business Center for the most efficient and effective future mission performance.

Distribution

Business Management Office (BMO)*

Corporate Board*

Major Subordinate Command (MSC) Commander*

Project Delivery Team (PDT)

Regional Management Board (RMB)*

Resource Provider(s)*

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Program Manager (PgM)

Ownership

The ~~BP/P2 Program Office~~Configuration Management Board 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]

CEFMS Cost of Doing Business

Cookbook[http://www.usace.army.mil/inet/functions/rm/rmpg/revcook.pdf]

Change Management[PROC1004]

Command Workload Analysis & Resource Leveling[PROC1024]

PMP Development[PROC1012]

Resource Estimate Development[PROC1003]

Resource Forecast Analysis Annual Schedule[REF1009]

Standard and Recommended Computations for Workload Analysis and Resource Leveling[REF1008]

Team Establishment[PROC1008]

Work Acceptance[PROC1016]

Activity Preface

This process is performed whenever workload and resource availability are being analyzed. This can occur when evaluating whether work should be accepted (see *Work Acceptance[PROC1016]*), or the impact of changes to existing projects/programs (see *Change Management[PROC1004]*).

When this process is complete, return to the calling process: *Work Acceptance[PROC1016]*, *PMP Development [PROC1012]*, or *Team Establishment[PROC1008]*.

Resource Provider(s)

1. Obtain district workload analysis report from P2.

~~P2 reporting requirements are currently under development.~~

2. Evaluate ~~how whether~~ the organization can provide resources necessary to execute the requested products and services.

~~Evaluate Priority for resource assignment shall be weighed on a regional basis as based on customer preference and the availability of district and regional in-house resources, considering compared to the outsourcing percentage goals and customer preference.~~

If process called from Work Acceptance[PROC1016], end of activity. Otherwise, goto Task #3.

3. Evaluate activities for lowest organizational level or functional employees.

The level-of-effort calculation is based on resource durations in P2. ~~Real life constraints will not allow~~Typically, USACE employees ~~cannot to~~ devote 100% of their effort to one activity ~~or on~~ one project at a time. In order to provide better schedules to the project delivery team and other stakeholders, and to provide better workload analyses to Resource Providers, a computation is provided to compute productive time (effective hours) available per FTE:

~~To see the computation,~~ (refer to *Standard and Recommended Computations for Workload Analysis and Resource Leveling[REF1008].*)

A report showing rollups for function and organization workload for month or fiscal year is available. Considering the staff availability and capability, resource providers will determine CFY excess capacity or workload. As a rule, CFY workload will be acceptable if within the upper and lower limits shown in the Quarterly Trigger Values Chart within *Standard and Recommended Computations for Workload Analysis and Resource Leveling[REF1008]*. Eighty percent of the effective hours is the recommended target for annual workload during the first quarter of the CFY, or during the BY or BY+1. Some organizations may have higher or lower workload targets, but ~~in no case should~~normally the annual target workload should be no more than 100% of effective hours in CFY. However, analysis may demonstrate overtime to be an effective means to meet short term workload requirements in accordance with local SOPs.

If workload conflict exists, goto task #4. Otherwise, end of activity.

Resource Provider, Project Manager (PM)

4. ~~Work with Project Managers to~~ change activity scope/schedule to resolve their team member's CFY workload conflicts while still meeting customer expectations.

Project managers also ~~includes-encompasses~~ program managers as defined in the ER 5-1-11 for including Support Services ~~as defined in the ER 5-1-11~~ in conjunction with the development of Program Management Plans (PgMP).

If workload conflict remains, goto task #5. Otherwise, end of activity.

~~Corporate Board~~Middle Management Team

5. Determine if other alternatives are available to resolve conflict.

The ~~DPM/Resource Provider~~ is responsible for communicating and documenting the ~~Corporate Board~~ decisions to the district.

If workload conflicts are resolved, end of activity. Otherwise, goto task #65.2.

Project Review Board (PRB)

- 5.2. Determine if other alternatives are available to resolve conflict.

The PM/Resource Provider is responsible for communicating and documenting the decisions to the district.

If workload conflicts are resolved, end of activity. Otherwise, goto task #5.5.

Corporate Board

- 5.5 Determine if other alternatives are available to resolve conflict.

The DPM is responsible for communicating and documenting the decisions to the district.

If workload conflicts are resolved, end of activity. Otherwise, goto task #6.

~~Business Management Office (BMO)~~ Regional Mangement Board (RMB)

6. Responsible to eExecute P2 Regional Resource Workload Analysis report.
7. ~~Advise Regional Management Board (RMB) of~~ Determine recommendation.

~~Business Management Office (BMO) is responsible for communicating and documenting all RMB decisions made by both the RMB and the MSC Commander.~~

Regional Management Board (RMB)

8. Recommend solution to MSC Commander.

Refer to *Command Workload Analysis & Resource Leveling* [PROC1024].

Major Subordinate Command (MSC) Commander

9. ~~Approve~~ Evaluate RMB recommendation.

If recommendation approved, ~~end of activity~~ goto task #10. Otherwise, goto task #6.

10. Notify District Commander of decision.

End of activity.

