

District/Center Workload Analysis and Resource Leveling - PROC1020

Scope

This process defines an approach to assist Project Managers (PM), Resource Providers, Middle Management Team, Project Review Board (PRB), and Corporate Board **in accomplishing** resource planning for the current fiscal year (CFY), and the two years beyond the CFY (CFY+1 and CFY+2). The Regional Management Board (RMB) will use *Regional Business Center Workload Analysis & Resource Leveling – PROC6003 [PROC6003]*.

Projections of an organization's CFY+1 and CFY+2 activities will be estimated based on best available information, which may not be **available when the projections are compiled**. Even an **approximation** based on PMPs and PgMPs, or other **available** written documents, **would be valuable for determining** workload in the future.

A resource in the context of this process is defined as a representative from within a District/Center, another office within the USACE, or other agencies. Resources obtained via contract are addressed in *Project Delivery Acquisition Strategy – PROC2050 [PROC2050]*.

Policy

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

ER 5-1-11, U. S. Army Corps of Engineers Business Process [http://www.usace.army.mil/inet/usace-docs/eng-regs/er5-1-11/entire.pdf]

Responsibility

The Resource Provider(s) is responsible for

- Extracting data from P2 to analyze scope, methods of accomplishment, **budget** and distribution for activities identified by project delivery teams in CFY, CFY+1, and CFY+2
- Ensuring adequate resources are available to meet the mission requirements and assigning roles to individual resources

The Project Manager (PM) is responsible for working with Resource Providers to resolve their team members' CFY workload conflicts.

The Middle Management Team is responsible for analyzing district workload and resolving resource conflicts between the PM and Resource Providers.

The Project Review Board (PRB) is responsible for analyzing district workload and resolving resource conflicts between the PM and Resource Providers **that are not resolved by the Middle Management Team**.

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The Corporate Board is responsible for analyzing district workload and resolving resource conflicts between the PM and Resource Providers **that are not resolved by the PRB**.

The Regional Management Board (RMB) is responsible for

- Resolving CFY resource conflicts referred by Corporate Boards
- Developing strategic plans regarding 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 under Regional Business Center Workload Analysis and Resource Leveling – PROC6003 [PROC6003]

The Major Subordinate Command (MSC) Commander is responsible for **approving or rejecting** the Regional Management Board (RMB) **recommendations**.

Distribution

Corporate Board*

Major Subordinate Command (MSC) Commander*

Middle Management Team*

Program Manager (PgM)

Project Delivery Team (PDT)

Project Manager (PM)*

Project Review Board (PRB)*

Regional Management Board (RMB)*

Resource Provider(s)*

Ownership

The BP/P2 Configuration Manager 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 – REF8000 [REF8000]

CEFMS Cost of Doing Business Cookbook

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

Change Management – PROC3010 [PROC3010]

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PMP/PgMP Development – PROC2000 [PROC2000]

Regional Business Center Workload Analysis and Resource Leveling – PROC6003 [PROC6003]

Resource Estimate Development –PROC2040 [PROC2040]

Resource Forecast Analysis Annual Schedule – REF8002 [REF8002]

Standard Computations for Workload Analysis and Resource Leveling – REF8001 [REF8001]

Team Establishment –PROC2020 [PROC2020]

Work Acceptance –PROC1000 [PROC1000]

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 – PROC1000 [PROC1000]), or the impact of changes to existing projects/programs (see Change Management – PROC3010 [PROC3010]).

When this process is complete, return to the process that brought you here: Work Acceptance – PROC1000 [PROC1000], PMP/PgMP Development – PROC2000 [PROC2000], or Team Establishment – PROC2020 [PROC2020].

Resource Provider(s)

1. **Execute** District **W**orkload **A**nalysis report from P2. 2. Evaluate whether the organization can provide resources necessary to execute the requested products and services.

Evaluate resource assignment based on customer preference the availability of district and regional in-house resources, considering outsourcing percentage goals, **and the need to maintain Regional Business Center competency levels.**

If you entered this process from Work Acceptance – PROC1000 [PROC1000], end of activity. Otherwise, goto Task #3.

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

Lowest organizational level for current phase or to CFY+2 (whichever timeframe is longer), Technical Division level beyond that point, **although** if greater detail is available, it should be used.

The level-of-effort calculation is based on resource durations in P2. Typically, USACE employees cannot devote 100% of their effort to one activity or 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.

Refer to *Standard Computations for Workload Analysis and Resource Leveling – REF8001 [REF8001]*.

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 Computations for Workload Analysis and Resource Leveling – REF8001 [REF8001]*. Eighty percent of the effective hours is the recommended target for annual workload during the first quarter of the CFY, or during the CFY+1 or CFY+2. Some organizations may have higher or lower workload targets, but 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(s), Project Manager (PM)

4. Change activity scope/schedule/**resources** to resolve their team member's CFY workload conflicts while still meeting customer expectations.

This step may require further coordination with customer.

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

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

Middle Management Team

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

The PM/Resource Provider is responsible for communicating the decisions to the **District and documenting in the PMP/PgMP.**

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

Project Review Board (PRB)

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

The PM/Resource Provider is responsible for communicating the decisions to the District and documenting in the PMP/PgMP.

If workload conflicts are resolved, end of activity. Otherwise, goto task #7.

Corporate Board

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

The PM/Resource Provider is responsible for communicating the decisions to the District and documenting in the PMP/PgMP.

If workload conflicts are resolved, end of activity. Otherwise, goto task #8.

Regional Management Board (RMB)

8. Execute P2 Regional Resource Workload Analysis report. 9. Determine recommendation.
10. Recommend solution to MSC Commander.

Refer to *Regional Business Center Workload Analysis and Resource Leveling – PROC6003 [PROC6003]*.

Major Subordinate Command (MSC) Commander

11. **Approve** RMB recommendation.

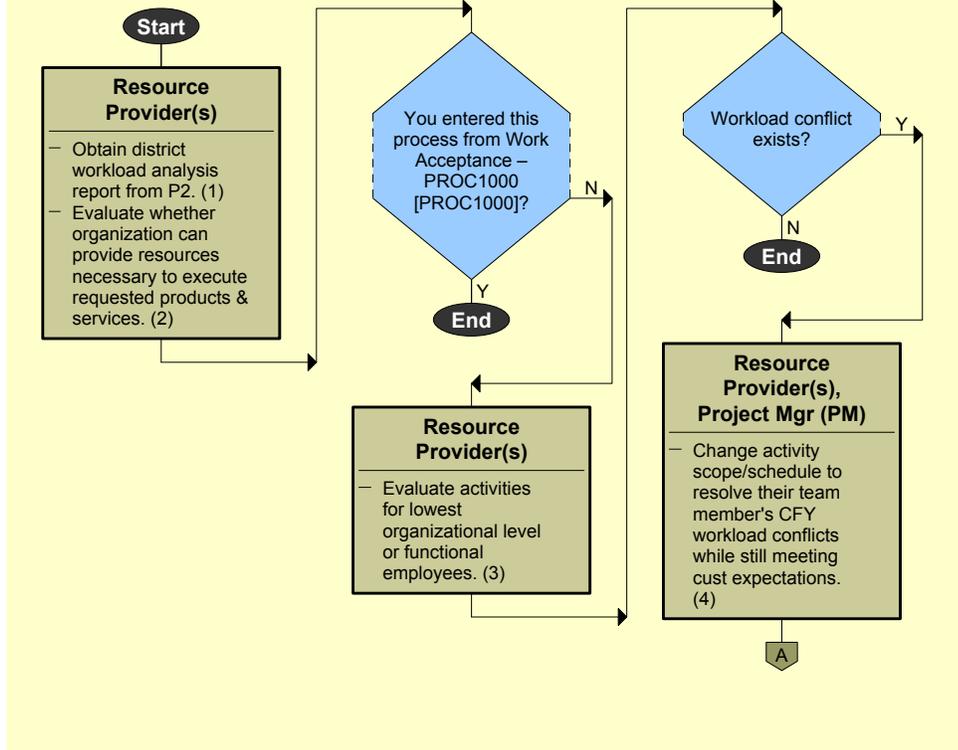
If recommendation approved, goto task #12. Otherwise, goto task #8.

12. Notify District Commander of decision.

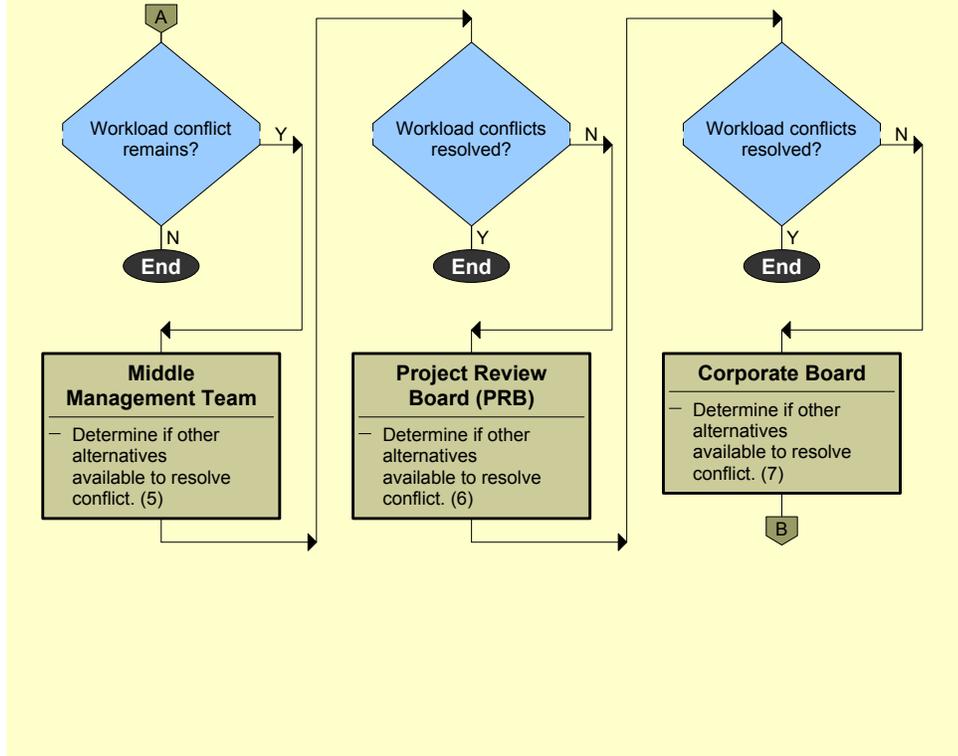
The PM/Resource Provider is responsible for communicating the decisions to the District and documenting in the PMP/PgMP.

End of activity.

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