Team Establishment - PROC2020 - CELRD

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

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
- Looking not only at individuals from the various functional organizations but also at the capabilities of the individuals themselves. By considering individuals who have multi-functional capability, the team is kept to a manageable size which is cost-effective and communications-enhancing Response: Accept

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.
- 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

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- **Providing qualified PDT members.**" Response: Accept - see reworded document

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

Project Delivery Team (PDT)

Project Manager (PM)*

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.

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System References

Acronyms and Glossary – REF8000[REF8000]

Change Management – PROC3010[PROC3010]

Customer Scope and Requirements Definition – PROC2010[PROC2010]

District/Center Workload Analysis and Resource Leveling – PROC1020[PROC1020]

Earned Value Management – REF8018[REF8018]

PMP/PgMP Content – REF8005[REF8005]

PMP/PgMP Development – PROC2000[PROC2000]

Project Delivery Acquisition Strategy – PROC2050[PROC2050]

Activity Preface

This process is performed during *PMP/PgMP Development – PROC2000[PROC2000]*, once the customer and project scope have been identified, and when a member of the PDT/ITRT is added or replaced. 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]*.

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 *District/Center Workload Analysis and Resource Leveling – PROC1020[PROC1020]* 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/Center. If the resource is unavailable at the District/Center, a resource will be sought from within 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 may be a threshold that causes *Change Management – PROC3010[PROC3010]* to execute.

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 – PROC2000[PROC2000]*.

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Project Manager (PM)

1. Inform customer that team is being established or modified.

2. Provide information from *Customer Scope and Requirements Definition – PROC2010[PROC2010]* to the resource providers.

   Preliminary information may be augmented by data and professional experience from projects of similar scope and complexity.

Resource Provider(s), Project Manager (PM)

3. Jointly evaluate deliverables defined in the scope of the project to determine what expertise and time commitments are required on the project team.

   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 *District/Center Workload Analysis and Resource Leveling – PROC1020[PROC1020]*.

4. Establish recommended team membership.

If both PM and Resource Provider(s) agree on available resources, goto task #7. Otherwise, goto task #5.

5. Elevate issue within District/Center as appropriate.

If team member issue resolved, goto task #7. Otherwise, goto task #6.

6. Search for appropriate resources.

   If there are insufficient resources available locally with the requisite capabilities, then the PM/Resource Provider(s) will look throughout USACE and other agencies. Document and flowchart does not specify what to do if appropriate resources/capabilities are not found.

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Response: Reject – During project initiation or workload analysis sufficient capability is already addressed. (in-house or contract)

Project Manager (PM)

7. Document Project Delivery Team (PDT)/Independent Technical Review Team (ITRT) by entering team members into P2.

   - Send notification to team members.
   - Establish system authority for team members in P2 and CEFMS for entering data.
   - Set and evaluate goals, build communications, and initiate team formulation.

   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 – PROC3010[PROC3010]* for returning to *PMP/PgMP Development – PROC2000[PROC2000]*.

End of activity.

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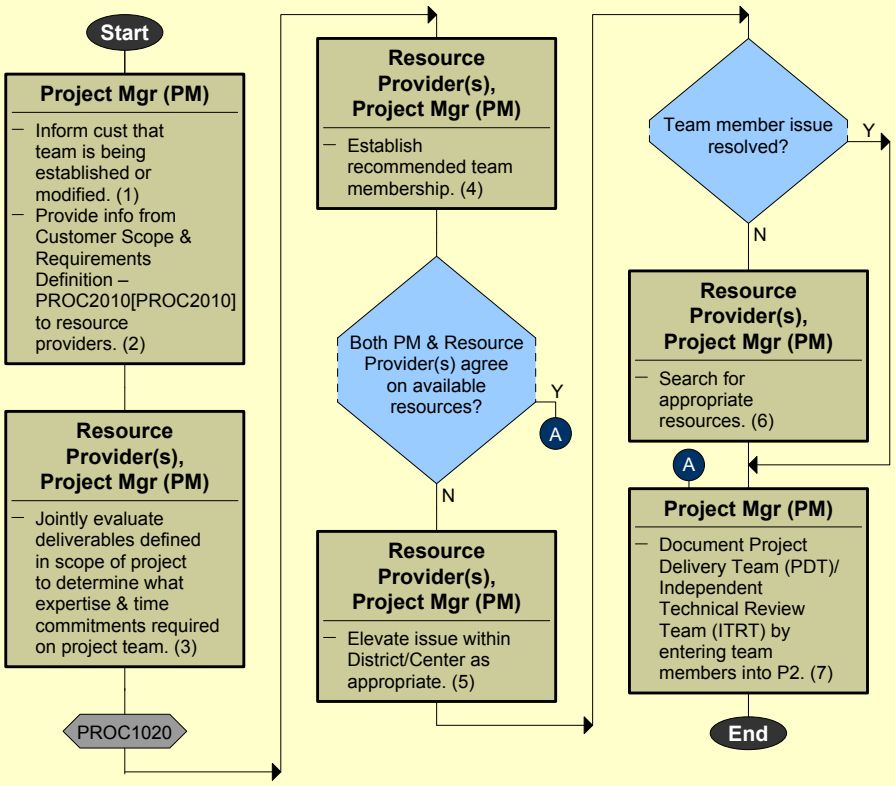
Team Establishment - PROC2020



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