

Team Establishment General Comment: it is becoming common to have team members for a project from MSC's and HQUSACE. This is not well addressed here...vertical team. Response: Reworded. See master document, refer to Responsibility paragraph

You need some sort of statement concerning 'team responsibility'. This should be the time when a team's common goals begin to be established. Response: Accepted. Reworded. See master document, statement added to PMP. Development process under kickoff meeting.

Resource Providers retain all supervisory control over their employees. Do PMs have input to ratings – either formally or informally? Do other PDT members? Will team evaluations be used? Response: Per local SOP.

Scope

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

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>] Why ER 37-1-26?
Response: Sentence deleted in master document.

Responsibility

The Project Manager (PM) is responsible for initiating and leading the Project Delivery Team (PDT). There needs to be more concrete guidance as to who should be a PDT team member or small offices may be forgotten. Also, some guidance regarding participation levels should be included (i.e. full time members, part time members, as needed, etc). Response: Per local SOP. PM will make every effort to identify all functional areas needed for project success during the planning stage, and to involve them throughout the lifecycle of the project. How is the PDT empowered? This must be defined as well as the process for their empowerment. Response: ER 5-1-11 states Senior leaders "work as a team to provide adequate resources and delegate authority commensurate with responsibilities to PM's and PDT members to enable project success."

Resource providers should determine if their functional area is required. Project managers do not always have the technical knowledge to know whether a functional area person should be part of

the team. It is better for the resource provider for a technical area to make that determination.
Response: Reworded. See master document.

The Resource Providers needs to be defined Response: Accepted. Will add to glossary. assist the PM by identifying team members for the project. Does this trigger happen once the PM has identified the need for a resource who works for you? Or some other way. Response: Reworded. See master document. 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. Give examples for the “Resource Providers” (e.g., Section/Branch Chiefs..)
Response: Accepted. Will be added to glossary.

Both PMs/PDTs and Resource Providers are responsible for and empowered to keep commitments they make in the project management plan. How does the resource provider know? (i.e. OC resource provider) Response: The PDT member must keep their resource provider informed. Also see Resource Estimate Development & Activity Development.

Distribution

Project Manager (PM)*

Resource Provider(s)*

Ownership

The BP/P2 Program 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 whenever a member of the PDT is added or replaced. A resource in the context of this process is defined as an individual from within a District/Lab/Center, or another office within the region. [This sounds like it doesn't address virtual teams such as the one that performed master planning in Korea. It included 8th Army, Far East District, Fort Worth District, Savannah District and Lab folks. Clarify guidance.](#)

[Response: Reworded. See master document.](#)

Rewrite of the above sentence by :

~~A resource in the context of this process is defined as an individual from within a District/Lab/Center, or another office within the region.~~ (Note: Disagree with the way this previous sentence is written. [Alternative: A resource...is defined as an individual from within the immediate organization, another Corps organizational within the purview of the Regional Business Center \(RBC\), or, a Corps District/Lab/Center resource external to the immediate RBC](#) [Response: Reworded. See master document.](#)

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. [My understanding is that individual "by name" requests is not the practice of the Corps. Instead, Resource Providers, are responsible for selecting individuals based on the requirements defined by the requestor. Will the PMBP change this approach? Response: Yes.](#)

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. [Are we \(i.e. overhead resources\) expected to do this for all work? Response: Yes.](#)

If the PM and 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 / corps. Response: Reworded. See master document. Resource providers should accommodate requests for particular individuals, if possible, but also should be able to make a final decision on whom is made available for the team. Response: Concur.

Comment: Last sentence doesn't make sense –why wouldn't the PM first look close to home, and then within his/her specific RBC before going to external Districts/Labs/Centers?
Response: Reworded. See master document.

Once a resource is committed to a project, the Resource Provider cannot change that commitment without consulting with the PM. The Resource Provider retains all supervisory control over their employees. Changing a resource commitment during project execution is a threshold that causes *Change Management[PROC1004]* to execute.

The PM will assure that each team member is entered Response: Reworded. See master document. 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 Managers should designate one of the members of the PDT as an alternate PM on large projects. Response: Per local SOP.

Project Manager (PM)

1. Evaluate deliverables defined in scope of work of the project to determine what expertise is required on the project team. In consultation with the resource team Response: Accepted. Reworded. See master document.
2. Provide basic scope of work, preliminary schedule, and preliminary project budget to the resource providers. Resource providers should be asked to provide this information for their technical area. Project managers do not always have the technical expertise to determine the scope, schedule and budget, particularly for real estate issues. Once the scope of work, schedule and budget have been set in the past, it has been difficult for resource providers to have this information changed. Response: Accepted. Reworded. See master document.

The preliminary schedule and project budget is based on experience with projects of similar scope and complexity. This is how we get started on the wrong foot to begin with.....let first budget be developed based on team's efforts. if you need an estimated cost prior to actual scope and budget by the team for programming purposes, use a placeholder and say so.
Response: This is an iterative process, schedule & budget will be continually refined.

3. Request personnel for functions to be performed.

PM may request specific team members that **they** Response: Sentence deleted in master document. believes would add unique value to a specific project.

PM **are** Response: Sentence deleted in master document. to balance strengths and limitations of the requested PDT members.

Resource Provider(s)

4. Review information provided by PM.
5. Determine expertise required and time commitment needed.

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. 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 This should have a corollary that there is a similar responsibility of the DPM to ensure that a qualified PM is provided to lead the PDT. Response: Sentence deleted in master document, however, corollary exists in ER 5-1-11.

How do we resolve disputes where the PM says I need 5 hrs legal work and the District Counsel says it requires 25 hrs? Response: See processes for Resource Estimate Development and Activity Development. The actual specifics are governed by local SOP. Partnering is the key to success.

7. Request PM's concurrence.

Project Manager (PM), Resource Provider(s)

If both PM and Resource Provider(s) agree, go to task #10. Otherwise, go to task #8.

8. Elevate issue within district/lab/center as appropriate. Recommend refer to PRB or "Corporate Board" at district Response: Per local SOP.

If team member issue resolved, go to 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

(Note: IF the business rules for searching/identifying/committing human resources are *first*, locally, *second*, regionally, then, *lastly*, external to that region, e.g., another District, a Lab, or Center, then, that business rule could have implications for final technical architecture design of P2. Do all Corps human resources need to be simultaneously and instantaneously available to every PM? Response: This is an ultimate goal of P2; however initial fielding will not provide this.

Project Manager (PM)

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

Send notification to team members.

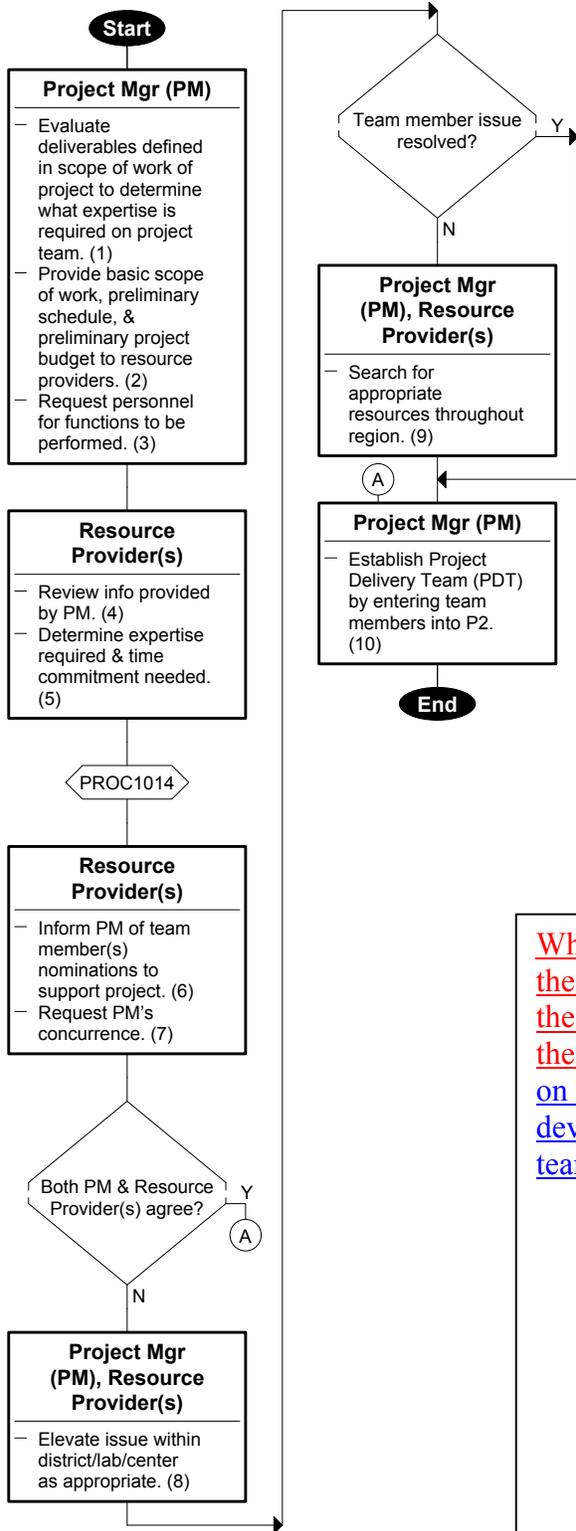
Team member assignments (especially the PM) remain constant throughout the life of the project, if at all possible. Also, USACE activities will make every effort to maintain original team members through the lifecycle of the project, making substitutions only when absolutely necessary.

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

Comment: The business process has no discussion of feedback to the resource provider on the quality of team member performance throughout the Project life cycle? Response: Currently per local SOP, but will be reviewed in future.

End of activity.

Flowchart should be expanded for searching for virtual teams with members outside the responsible geographic MSC. Response: Rejected. Oracle Tutor doesn't support this functionality.



Where is the customer on the flow chart? I thought the customer was part of the PDT? The customer is on team, this is for the development of Corps team members.