

Project Workload Analysis and Resource Leveling

Scope

This process defines the means by which Project Managers (PM), Resource Providers, What are Resource Providers? Are they ever defined anywhere? Response: Accepted. Will add to glossary.

“Resource Provider”—If and when there are Headquarters Program Managers, at either the Division or HOUACE level, they are in fact resource providers. I feel there is a need for these resource providers to develop and project requirements and anticipated workload, in conjunction with the customer, over the period of the POM (5-6 year projection), and that provides the baseline that later is adjusted by the CFY and BY analysis. We need to incorporate in this process the entire POM and PPBES cycle that our customers go through. Response: HQ Business process has not been provided. Contact PMT to determine deliverables.

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 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, even a rough estimate based on PMPs, or other written documents will be worthwhile in anticipating workload in the outyears and therefore useful in the analysis. The accuracy and value of workload and workforce projections and the associated workload leveling processes diminish rapidly when they move from the current year into all future years. This is especially true regarding military and SFO workload, where USACE does not control the work generation and the work assignment processes as it does on CW work. The workload analysis and resource leveling process must fully reflect these diminishing returns in order to be realistic and respected. Workload and workforce planning should still occur, but using vastly different techniques and tools. Response: Concur. We are evaluating the use of modeling tools.

Overly complicated and does not appear to account for outsourcing. Response: This process only evaluates the availability of Corps resources, and does not limit our ability to contract for resources.

The PMBP should place emphasis on mission priorities and hold supervisors accountable for achieving those priorities. If this policy stands as-is, the losers in the resolution process will consistently be those supervisors from non-technical organizations that are viewed as “unimportant” to the technical mission. Response: All work is important.

Policy

[Consolidated Command Guidance](http://www.usace.army.mil/inet/functions/rm/regs/regs.htm)[\[http://www.usace.army.mil/inet/usace-docs/eng-regs/er5-1-11/entire.pdf\]](http://www.usace.army.mil/inet/usace-docs/eng-regs/er5-1-11/entire.pdf)

[ER 5-1-11](http://www.usace.army.mil/inet/usace-docs/eng-regs/er37-1-26/entire.pdf)[\[http://www.usace.army.mil/inet/usace-docs/eng-regs/er37-1-26/entire.pdf\]](http://www.usace.army.mil/inet/usace-docs/eng-regs/er37-1-26/entire.pdf)

I fail to see the appropriateness of citing ER 37-1-26 as a policy reference for this workload analysis and resource leveling section. Explain why this is appropriate. Response: Accepted.

Responsibility

The MSC Response: Reworded. See master document. Business Management Office (BMO) not defined Response: Reworded. See master document., in support of the Regional Management Board, will be Response: Reworded. See master document. 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. Describes an MSC-level workload analysis and resource leveling, but is skimpy on the district-level workload analysis and workload leveling. The district is the business end of our business and that is where the primary analysis must be done if it is to be effective. Response: Reworded. See master document.

The Resource Management Office in coordination with the PBAC is responsible for validation of the District workload and determination of FTE allocations within the District. Response: This process deals primarily with skill sets rather than FTE. See Manpower requirements process.

The Corporate Board and/or Project Review Board is responsible for deciding all unresolved 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. What is the role of the RM in this process? Most conflicts can and should be resolved within the offices of the district. Establishing a default process will make it even easier to circumvent the financial expertise in the RM offices. Response: This process deals primarily with skill sets rather than FTE. It only escalates beyond the District if the matter cannot be resolved. See Manpower requirements process.

In addition, under *Command Workload Analysis & Resource Leveling*[PROC1024], the RMB is responsible

for developing strategic plans regarding personnel acquisition or dismissal, contract type and quantity, development of regional centers of expertise, [Clarify that establishment of regional centers of expertise should also be coordinated with HQUSACE. Response: Already covered by existing policy.](#) etc, in order to posture the Regional Business Center for the most efficient and effective future mission performance. [Also, under **Manpower Requirements Process \[PROCXXXX\]** the RMB is responsible for the validation of MSC \(Regional\) workload and determination of FTE allocations to the Dist/Div/Labs. Response: This process deals primarily with skill sets rather than FTE. See Manpower requirements process.](#)

Distribution

Business Management Office (BMO)*

Corporate Board*

Major Subordinate Command (MSC) Commander*

Project Delivery Team (PDT)

Regional Management Board (RMB)*

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. [Ownership paragraph is not understood. Is it suppose to be saying that the BP/P2 Program Office is responsible for ensuring that this document “is adhered to” in lieu of “is necessary”? HQ policy makers are the ones who should determines if this manual is necessary. Response: Comment rejected. BP/P2 Program Office changed to Configuration Management Board. See glossary. This is a living document, and a configuration control board is established to ensure that appropriate updates & changes are made.](#)

System References

[Acronyms and Glossary\[REF1001\]](#)

[CEFMS Cost of Doing Business](#)

[Cookbook\[http://www.usace.army.mil/inet/functions/rm/rmpg/revcook.pdf\]](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 There is work that we are responsible for as federal stewards that never gets budgeted for. How should this work be accounted for? Examples are disposals of land that don't take place because of costly compliance with environmental and cultural resources laws and encroachments that are not cured. All work should be accounted for in the PMBP process, even if it remains as an unfunded work requirement. Response: Refer to PMP Content, level of detail, which deals with outyear/unfunded/unknown work.

, 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. Seems like we're projecting the wrong image here when we say run a report in P2 but then say P2 is under development. Response: Sentence deleted in master document.

P2 reporting requirements are currently under development. Recommend adding parenthesis, italicizing and relocating the phrase at the end of para. #1. Response: Sentence deleted in master document.

2. Evaluate how the organization can provide resources necessary to execute the requested products and services. Resource Providers are asked to assess resources for the requested work. Once again, what about on-going management work? Response: It is all part of 'work' that's evaluated in the Workload Analysis report.

Priority for resource assignment shall be weighed on a regional basis as compared to the outsourcing percentage goals and customer preference.

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 USACE employees to devote 100% of their effort to one activity 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 the annual target workload be more than 100% of effective hours.

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

4. Work with Project Managers * to change activity scope/schedule to resolve their team member's CFY workload conflicts.

*Project managers also includes program managers for Support Services as defined in the ER 5-1-11 in conjunction with the development of Program Management Plans (PgMP).
[Need to check this reference. Response: BP team will review and respond.](#)

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

Corporate Board

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

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

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

Business Management Office (BMO)

6. Execute P2 Regional Resource Workload Analysis.
7. Advise Regional Management Board (RMB) of recommendation.

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

This section indicates it is the responsibility of the Business Management Office to execute a report and advise the RMB on workload/resource related problems. This should not be a Business Management Office responsibility. It is a role for PM and RM. Business Management may have a role in looking out to the future and identifying future missions and customers but they do not have a role in the management of resources, either dollars or FTE. If P2 is going to be used in the future to forecast FTE requirements (replacing FORCON and CERRAMS), RM's role in this process needs to be identified and clearly articulated in this manual. RM should have the lead role in advising the Commander and the RMB on the availability of "resources", not the Business Management Office. Response: Reworded. See master document. Responsibility changed from BMO to RMB. This process deals primarily with skill sets rather than FTE.

Regional Management Board (RMB)

8. Recommend solution to MSC Commander.

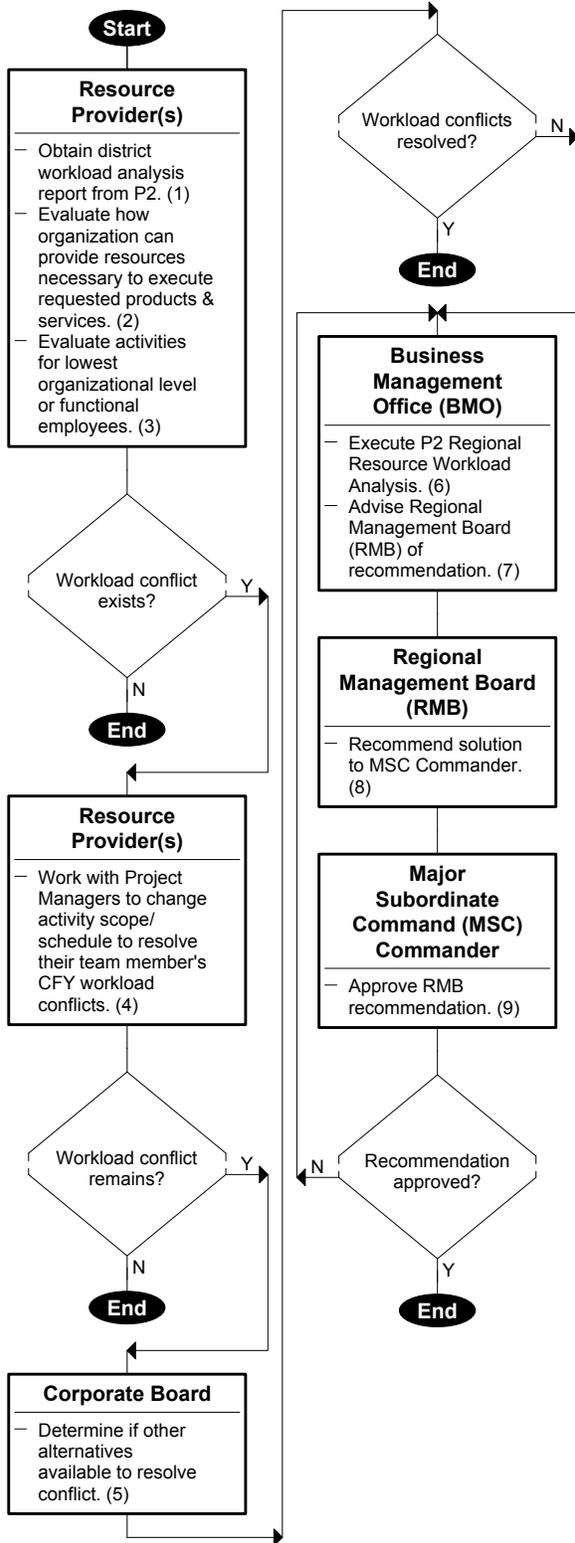
Refer to *Command Workload Analysis & Resource Leveling*[PROC1024].

Major Subordinate Command (MSC) Commander

9. Approve RMB recommendation.

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

End of activity.



The flowchart shows activities ending but no where to go, i.e. next activity. It seems to indicate on page 23/231 under Activity Preface where to go next but the flowchart doesn't reflect this. Response: Rejected. Oracle Tutor doesn't support this functionality.