

Team Establishment-**LRD**

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 are we referencing this?** *Response: Accepted*

Responsibility

The Project Manager (PM) is responsible for initiating and leading the Project Delivery Team (PDT). **The Response: accepted**PM will make every effort to identify all areas **of expertise** **Response: Sentence reworded** needed for project success during the planning stage, and to involve them throughout the lifecycle of the project.

The Resource Providers assist the PM by identifying team members for the project. 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.

Both PMs/PDTs and Resource Providers are responsible for and empowered to keep commitments they make in the project management plan. **The Resource Provider “contracts” with the PM on delivery of the commitment (via the PMP or PgMP) and the PDT member is then empowered to act on behalf of the Resource Provider within the scope of that “contract.”]** *Response: Paragraph reworded, see master documents.*

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 when **Response: Sentenced reworded see master document** 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. 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. 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.

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.

Once a resource is committed to a project, the Resource Provider cannot change that commitment without **first conferring Response: Rejected retained original words** 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 enter the team members 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]*. **The Communication Plan should portray which team members are required for team meetings, public meetings, meeting with the sponsor, technical reviews, etc. Response: will be added to communications plan**

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Project Manager (PM)

1. Evaluate deliverables defined in scope **Response: Sentence deleted in master document** of the project to determine what expertise is required on the project team.
2. Provide basic scope **Response: accepted.**, preliminary schedule, and preliminary project budget to the resource providers.

The preliminary schedule and project budget is based on experience with projects of similar scope and complexity.

3. Request personnel for functions to be performed.

PM may request **through the Resource Provider Response: Sentence reworded combined actors , see master document** specific team members that s/he believes would add unique value to a specific project.

PM should try 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 **or a PM or Resource Provider requests that a PDT member be replaced , Response: Sentence reworded, see master document** then the Resource Provider(s) **or PM Response: Sentence reworded, see master document** should try to accommodate the request. **Resource Providers should provide replacement PDT members with appropriate experience while balancing Response: Sentence reworded, see master document** workload and prior commitments to avoid over-committing individual team members.

6. Inform PM of team member(s) **assignment Response: Sentence reworded, see master document** to support the project.

ER 5-1-11 states that Resource provider(s) are responsible for providing qualified PDT members.

Response: Sentence deleted

Project Manager (PM), Resource Provider(s)

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

8. Elevate issue within district/lab/center as appropriate.

PM/Resource Provider document reason for disagreement of PDT member.Response: Rejected below the line local process

If team member issue resolved, goto task #10. Otherwise, goto task #9.

9. **If there are insufficient resources available locally with the requisite capabilities,** search for appropriate resources throughout the region. Response: Sentence reworded, see master document

If there are insufficient resources available locally with the requisite capabilities, then the PM/Resource Provider(s) will look throughout the region **Note: Are resources just COE, if not this needs to be better defined.** Response: Accepted wording in activity preface modified to reflect

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].

End of activity.

