

# Team Establishment

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## 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>]

## Responsibility

The Project Manager (PM) is responsible for initiating and leading the Project Delivery Team (PDT). PMs, **in coordination with Resource Provider, Response: Accepted** 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.

The Resource Providers **support the project and assist the PM by identifying expertise needed and assigning team members to the project delivery team. They are also responsible for ensuring that assigned staff and contractors support the PM and the project team; providing technical information, consultation and advice to the project team; and providing control, supervision and oversight of technical work of the PDT members. Response: Accepted. Reworded. See master document** They are also responsible for maintaining the integrity of the original PDT to the greatest extent possible. **Response: Rejected , original language captures the intent of the ER better.**

 PDTs are responsible for and empowered to keep commitments they make in the project management plan. **Response: Accepted , only “Pm” deletion.**

## Distribution

Project Manager (PM)\*

**Project Delivery Team (PDT) Response: Accepted**

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. 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 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 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]*.

## Project Manager (PM)

1. Evaluate, **in coordination with Resource Provider the functional requirements** defined in scope of work of the project to determine what expertise is required on the project team.  
**Response: Reworded , moved to step 4**

**Consult with any required support organizations such as Safety and Health, Counsel, Information Management Office, Logistics, etc. for regulatory requirement and/or items affecting project execution. Response: Reworded , see step 4**

**Independent Technical Review Team will be established as required by the Quality Control Plan. Response: BP Team will review & respond , part of the Quality Mgmt Plan??**

2. Provide basic scope of work, 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 specific team members that s/he believes would add unique value to a specific project **and Response: Reworded , moved to step 4** should **consider team dynamics** try to balance strengths and limitations of the requested PDT members.  
**Response: Reworded , moved to step 4**

## 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.

**Response: Accepted** Resource provider(s) are responsible for providing qualified PDT members.

7. Request PM's concurrence.

## 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.

Which process does the user go to to resolve this issue? (eg specific individual, expertise, etc) or is this District/RBC specific (i.e. below-the-line) Response: per local SOP

If team member issue resolved, goto 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

## Project Manager (PM)

10. Document team members in PMP by entering in P2. Response: Accepted

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 necessary. Response: Accepted

Response: Reworded

End of activity.



