

FACILITIES MAINTENANCE AND ENGINEERING PROCEDURE		
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1.0 PURPOSE

The purpose of this procedure is to define and standardize the decision elements that determine the resource assignment for execution of a Planned Work Order (WO). This procedure applies to all planned work requests received by FME.

2.0 GENERAL

When a requirement for construction, alteration or renovation of a National Cancer Institute (NCI) facility is identified, a determination is made whether the Operations and Maintenance (O&M) Department and/or the FME Engineering Department can fulfill the requirements. In order to make that determination, the skills required to accomplish the effort and the scheduling of the effort are first examined to verify the customer's schedule requirements can be met.

If the necessary skills and schedules can be met in-house, the work is typically done with facility staff. The use of in-house personnel is preferred based on the authorization granted through the annual budget process. Through the annual budget process, NCI-Frederick approves staffing levels, positions, and budget and allocates fiscal authorization deemed reasonable to support the NCI-Frederick campus. The budget authorization process also factors in the level to which the FME organization can generate sales by performing construction, alteration, or renovation support to the various programs. Establishment and achievement of the sales target ensures that management attention is focused on the level of resources dedicated to and expended on infrastructure support.

In situations where the O&M or Engineering Departments do not have the necessary skills, or are unable to meet the customer's schedule through renegotiation or reprioritization of the activity, a determination is made to subcontract the work to a contractor. Engineering resources may be augmented by utilizing the indefinite delivery / indefinite quantity (ID/IQ) contracts mechanism. This acquisition strategy may be used to support efforts for advanced laboratory design, architect-engineer services, time and materials engineering on a task order basis. Construction services may be obtained by using either a pre-approved Delivery Order Contractor or another contractor via full and open competition. Frequently, the customer's requirements are met using a combination of the FME staff and one of these subcontracting methods.

2.1 DEFINITIONS

Acquisition Strategy – The method determined by the project team as the preferred project execution strategy. The determination evaluates whether the work should be done by utilization of FME staff and/or subcontracting portions of an effort.

Blanket Order Agreement – A formal contract that sets terms and conditions for procuring goods and services. (FMEP-G-0055A)

Delivery Order Contract (DOC) - The Delivery Order Contract (DOC) provides for the management and execution of a broad variety of minor construction, alteration, and renovation projects for the NCI facilities on an as-needed basis. Use of the DOC contract mechanism allows for task based competitive bidding among a group of

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pre-qualified bidders resulting in a more expedient response than other contracting alternatives by eliminating the requirement for advertisement and a shortened time requirement for obtaining a proposal. (FMEP-G-0055B)

A/E Indefinite Deliverable/Indefinite Quantity (ID/IQ) refers to a contract mechanism established to obtain A/E services for: state-of-the-art laboratory planning resources for advanced laboratory design, procuring architect-engineer services, acquiring time and materials engineering services via task order. These contracts are used to augment FME staff and eliminate the need for additional in-house resources.

Planned Work Order does not require immediate action. A customer approved cost estimate and schedule are required.

Purchase Request is a generalized term for the documentation identifying the material, equipment or services requiring procurement. The purchase request form and related attachments are used to convey information to the Acquisition and Logistical Services organization in connection with a request for procurement. (FMEP-G-0055)

Scope of Work is a document issued in accordance with FME Procedure FMEP-P-0210. This document identifies the scope of the project in sufficient detail for cost estimate to be developed.

Work Order Review Meeting (WORM) is the meeting in which representatives from Project Management, Operations and Maintenance, and Project Controls discuss the initial disposition of planned work orders as described in the Work Order Processing procedure. (FMEP-G-0160)

2.2 RESPONSIBILITIES

Project Team is responsible for objectively developing project Scope of Work and acquisition strategy that meet the Program's requirements for an assigned work order. This forum addresses ideas, concerns and expectations to deliver a successful project.

Project Managers are responsible for leading the project team and ensuring internal and external coordination be accomplished in a manner for the assigned work order to be successfully executed meeting the Program's expectations and requirements.

3.0 PROCEDURE

3.1 Resource Assignment

An Acquisition Strategy determines whether the work should be done by utilization of FME staff and / or subcontracting a portion of the effort

3.1.1 PROCESS

A requestor, through the work order request process as outlined in procedure FMEP-G-0160, initiates a work order. After review of the work order by the Safety Office, the request is reviewed at the Work Order Review Meeting (WORM). At the WORM, a project manager is assigned responsibility for the work order and is given an initial assessment of resource requirements performed.

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The Project Manager gathers the Project Team to further clarify work scope and to consider the factors that determine the resource assignment process, often referred to as the project execution strategy. The resource assignment process is as follows:

- Evaluation of resource requirements
 - Determination whether work scope is within the skill set of FME personnel
 - Level of Engineering resources required
 - Level of Craft resources required and identification of involved shops
- Identification of potential issues that support use of in-house resources
 - Special access requirements or restrictions
 - Project phasing requirements potentially impacting schedule
 - Potential for program disruptions
 - Requires in-depth knowledge of building or systems
- Evaluation of resource availability
 - Engineering Manager evaluation of resources
 - Evaluation of Shop Resources on Plan of the Week schedule
 - Determine if outsourcing has the potential to create surplus resources
- Negotiation of commitments with customer, scope, schedule, and budget
 - Assess customer need date versus anticipated Beneficial Occupancy Date
 - Consider reprioritization as a means to accelerate job execution
 - Determine impact of reprioritization on other jobs in cue
 - Determine Program's budget tolerance relative to schedule expectation
 - Determine affordability of outsourcing option
 - Determine customer preference for in-house resources

3.1.2 Special Considerations

Each week, the project manager, representing the work request, attends the Plan of the Week (POW). The purpose of this meeting is to review the planned utilization of resources and opportunities to insert new work. If the necessary skills and schedules can be met in-house, the work is typically done with facility staff. If the project team decides to outsource the project and an assessment of the current work plan clearly indicates a surplus of FME resources, a negotiation with the customer regarding expectations, priorities and requirements may be necessary to ensure NCI-F is receiving the best value.

In the event that the FME skill set or resource availability is not consistent with the project requirements, contracting for services may be necessary. Some desired goods or services are available via a blanket order agreement. If the services or items required are not allowed to be purchased through the Blanket Order Agreement (FMEP-G-0055A), the purchase request process, see FMEP-G-0055, is used to obtain the requested item.

The DOC process was established to award task based projects through a competitive bidding process to a pre-screened group determined as representative and competitive relative to the economy and response time. Utilization of the DOC contract should be considered for jobs less than \$1.0M. (FMEP-G-055B) Award to a DOC contractor is more expeditious than full and open competition since the requirement for advertisement is

