



**Department of the  
NAVY  
Research, Development & Acquisition**

# **Business – Financial Management (BUS-FM)**

## **Budget/Program Analyst Competency Framework & Career Path Guide**

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## Background

Ms. BJ White-Olson, Deputy Assistant Secretary of the Navy for Management and Budget (DASN M&B), and the Department of Navy (DoN) National Lead for Business - Financial Management (BUS-FM) chartered the BUS-FM Competency Board in June 2011. One of the Competency Board's goals identified in FY12 was to develop a career field roadmap for both the Budget/Program Analyst and Earned Value management workforce. SPAWAR was designated as the lead for developing the Budget/Program Analyst career field roadmap under the leadership of the SPAWAR Finance Competency Lead and Business Financial Management Competency Lead. SPAWAR led the effort with strong support from members of NAVAIR, NAVSEA, MARCOR, and NAVSUP. All participants were actively involved with developing portions of the final framework. The team also included advisors from ASN, Research Development & Acquisition (RD&A) Defense Acquisition Career Manager (DACM); DASN, M&B Director for Earned Value Management (EVM); and Navy International Program Office (N-IPO).

## Purpose

The BUS-FM Competency Framework and Career Path Guide is a reference document for members of the Acquisition BUS-FM Community that assists in identifying developmental paths which are applicable across all SYSCOMs. It also includes training and education for each proficiency level so members of the community have a guide to assist them in developing their individual capabilities. It is designed to:

- Provide a framework and attributes for consideration when developing career goals and aspirations
- Provide employees written guidance on the knowledge, skills, and experience required to succeed
- Provide employees and managers the ability to create an Individual Development Plan
- Offers the ability to articulate team staffing needs and the ability to identify gaps
- Be used to assist with strategic and workforce planning efforts to understand future capability gaps

This document is intended to be a reference guide and developmental tool only. The professional development opportunities listed in this guide are recommended - *but not required* - as not all opportunities are available or appropriate for every Program Executive Office (PEO), Competency, or Business Unit. This document is *not* intended to be a definitive source of professional development opportunities nor a step-by-step guide to success, as there are many more opportunities for the BUS-FM Community than could be captured in a single reference source.

*Following the information within this handbook does not guarantee a promotion or a career path change.* Rather, it identifies and assists in acquiring the knowledge and skills found within a general BUS-FM career path.

The framework and guide are a work in progress and will continue to evolve as the BUS-FM Community further defines its professional development processes and opportunities.

## **Business Financial Management Competency Framework and Career Path**

The BUS-FM Competency Framework and Career Roadmap are defined by three major dimensions: 1) Technical Core Competencies, 2) Leadership Competencies and 3) Training, Certification & Education as depicted in *Figure 1*.

**Technical Core Bus-FM Competencies** outlines the types of functional knowledge, skills, and abilities that an individual should exhibit for his or her job. It also captures the experiences, tasks and responsibilities that an employee should perform as he or she increases capability within a competency.

**Leadership & Professional Development** outlines individual and organizational competencies that are important for the effective performance of employees, supervisors, managers, and executives. It also recommends leadership training and professional development that can maximize productivity, shape a positive culture, and promote harmony in the workplace.

**Training, Certification & Education** recommends trainings and educational certifications and degrees that enhance an employee's overall personal and professional development.

Proficiency Levels	ENTRY	JOURNEYMAN	ADVANCED	EXPERT
	Intern New Hire Analyst	Project Lead Integrated Product Team (IPT)/ Team Participant	BUS-FM Program Lead Supervisor IPT Leads	Manager/Supervisor BUS-FM Executive Office/HQ Lead DAWIA Career Field Manager Competency Manager
<b>Career Progression</b>				
Technical Experience & Core Competencies	Less than 2 years experience or new to organization. Basic knowledge of Financial Management (FM) principles. Understands FM policies, regulations and organizational strategic goals. Junior members of a larger team, assists in performing analysis and require direct supervision.	Two years minimum experience, in DoN and/or DoD FM. Application of FM processes and techniques. Demonstrates use of FM policies, regulations and meeting personal objectives that support organizational strategic goals. Works independently, performing analysis and providing recommendation with limited direct supervision.	Minimum five years experience in DoN and/or DoD FM. Advanced knowledge and fluent application of FM processes and techniques. Demonstrates leadership skills in interpreting FM policies and regulations and application of organizational strategic goals. Perform independent analysis and problem solving with minimal supervision. Leaders or senior members of teams.	Minimum eight years, extensive experience, in DoN and/or DoD. Advanced synthesis and application of complex FM concepts and techniques, as well as strategic knowledge and influence of financial processes. Demonstrates leadership skills in interpreting FM policies and regulations to influence outcomes and defines organizational strategic goals. Leaders of teams, interpret analysis in final decision making, and are advanced knowledge resources in their field.
	ACQUISITION PLANNING    FISCAL LAW & POLICIES		BUDGET FORMULATION    ACCOUNTING PRINCIPLES & POLICIES    AUDIT READINESS	
	FINANCIAL & ECONOMIC ANALYSIS		BUDGET EXECUTION    FINANCIAL SYSTEMS FUNCTIONALITIES    FINANCIAL REPORTING	
Leadership Development & Business Acumen	Continual Learning    Flexibility Communication    Critical Thinking Stress Tolerance    Dependability Attention to Detail    Professionalism Customer Focus    Initiative Interpersonal Dynamics Cooperation / Teamwork	Situational Leadership    Accountability Creativity and Innovation    Instructing Process Management    Active Learning Conflict Management    Risk Management Technology Management    Monitoring Decisive Problem Solving    Team Building Managing Customer Relationships	Change Management    Leadership Technical Credibility    Resilience Leveraging Diversity    Entrepreneurship Resource Management Human Capital Management Employee Performance Management Mentorship/Developing Others	External Awareness    Vision Influencing/Negotiating    Partnering Strategic Thinking    Political Savvy Mission Accomplishment
Required DAWIA Training	BUS-FM Level I*	BUS-FM Level II*	BUS-FM Level III*	BUS-FM Level III*
Recommended Education & Certification	Associate's/Bachelor's	Bachelor's/ Master's	Bachelor's/ Master's	Bachelor's/ Master's/Doctorate
	CDFM	CDFM/CDFM (A)	CDFM/CDFM (A)	CDFM/CDFM (A)

\*NOTE: For 500 series BUS-FMs, DoD Financial Management Certification is also required

**Figure 1 – Competency Framework and Career Path**

## **Competency Proficiency Levels**

The BUS-FM Competency Framework and Career Roadmap divide competency development into four proficiency levels. These divisions *do not* equate to grade levels, rather, they represent a stage of one's career within the BUS-FM Career Path. As a person increases their knowledge and experience they progress along these developmental levels within each of the technical core and leadership development competencies. The four levels are:

### **Entry**

The Entry stage applies to BUS-FMs with less than two years of work experience or those who are new to their organization. Expected knowledge includes a basic understanding of Financial Management (FM) principles such as FM terms, processes, and techniques. Also required are understanding and importance of FM policies, regulations and organizational strategic goals. Personnel are junior members of a larger team, assist in performing analysis and require direct supervision.

### **Journeyman**

The Journeyman stage applies to BUS-FMs who have at least two years experience in DoN and/or DoD FM. Expected knowledge includes the application of FM processes and techniques. Also required is the demonstrated ability to use FM policies, regulations, and meeting personal objectives that support organizational strategic goals. Personnel generally work independently, perform analysis and provide recommendations with limited direct supervision.

### **Advanced**

This Advanced stage is applicable to BUS-FMs who have a minimum of five years, long-term experience, in DoN and/or DoD FM. Expected knowledge includes the advanced understanding and fluent application of FM processes and techniques, as well as the ability to assist and lead others in the field. Personnel should also be able to demonstrate leadership skills in interpreting FM policies and regulations, and in the application of organizational strategic goals. Personnel work independently and perform independent analysis and problem solving with minimal supervision. They are often leaders or senior members of teams.

### **Expert**

The Expert stage applies to BUS-FMs who have a minimum of eight years extensive experience in DoN and/or DoD FM. Expected knowledge includes advanced synthesis and application of complex FM concepts and techniques, as well as strategic knowledge and influence of financial processes. Experts demonstrate leadership skills in interpreting FM policies and regulations to influence outcomes and define organizational strategic goals. Personnel are leaders of teams, interpret analysis in final decision making, and are considered expert knowledge resources in their field.

## **BUS-FM Technical Core Competencies**

BUS-FM Technical Core Competencies outlines the nine specific competencies that are essential to performing BUS-FM job duties. The nine competencies are as follows:

### ***Budget Execution***

The knowledge and understanding of Federal Financial Management Regulations, Policies, and Procedures needed to effectively execute funds appropriated by Congress. The ability to utilize sound fiscal judgment obtained from financial and business training to ensure funds are executed within the purpose, time, and amount authorized. Ensure required competencies are acquired to facilitate sound conceptual execution of resources provided.

### ***Financial System Functionalities***

The comprehensive understanding of financial systems and their functionalities. Knowledge of reporting capabilities and ability to utilize financial data to provide programmatic and financial recommendations to stakeholders.

### ***Accounting Principles and Policies***

The knowledge and understanding of both budgetary and proprietary Financial Accounting principles and policies associated with DoN funding appropriations. The ability to apply sound DoD accounting practices using the most current accepted principles and policies established. Ensure the requisite competencies are acquired to enable proper usage of accepted accounting principles, policies, and procedures are adhered.

### ***Fiscal Law & Policies***

The understanding of the body of law that governs the availability and use of federal funds. Knowledge of the process by which Government expenditures are authorized and funded as well as differentiates between the major types of appropriations and their uses.

### ***Budget Formulation***

The understanding of front-end process by which a specified budget is developed, justified, and defended. Budget formulation includes the Program Objectives Memorandum (POM) output, presentation of budget materials, and Congressional briefings to Professional Staff Members (PSM).

### ***Financial Reporting***

The understanding and support of Acquisition Reporting, Financial Statements, Audit Readiness reporting, Execution Status, and Reports extracted from FM systems.

### ***Financial & Economic Analysis***

The ability to forecast, analyze, reconcile and recommend strategies utilizing programmatic and financial data to provide sound advice in accordance with fiscal policies and regulations.

***Acquisition Planning***

The knowledge of the DoD 5000 Instruction and its governance and interaction with Decision Support Systems (PPBE process, JCIDS, and DAMS). Acquisition Planning is event driven and consists of various milestones. Key activities are performed during each milestone to provide for informed decision making and are consistent with PPBE phases.

***Audit Readiness***

The understanding of all policies and concepts associated with establishing and maintaining internal controls in accordance with DoD guidance. Also provides analysis and support to auditing activities such as documentation retention, substantive control testing, and business process improvement.

## **BUS-FM Technical Core Competency KSAs and Trainings**

In the following tables, each core competency describes the necessary experience and knowledge, skills, and abilities (KSAs) for a BUS-FM to satisfy proficiency at each of the four stages. Additionally, trainings have been identified for each core competency to support employee development in closing competency gaps. The following trainings are only a suggested list. Other organization based trainings or alternative learning methods may also be utilized to assist in employee's growth.

**Budget Execution**

The knowledge and understanding of Federal Financial Management Regulations, Policies, and Procedures needed to effectively execute funds appropriated by Congress. The ability to utilize sound fiscal judgment obtained from financial and businesses training to ensure funds are executed within the purpose, time, and amount authorized. Ensure required competencies are acquired to facilitate sound conceptual execution of resources provided.

Entry	Journeyman	Advanced	Expert
<ul style="list-style-type: none"> <li>• Basic ability to interpret information on a funding document</li> <li>• Basic knowledge of appropriated funds, use of funds and funds flow from Headquarter organization to the executing activity level</li> <li>• Basic knowledge of budget and /or project execution</li> <li>• Understand and support development of budget estimates/spend plans</li> <li>• Basic knowledge of the relationship of budget execution processes to PPBE</li> <li>• Ability to provide financial acumen, customer service, accountability, process management, and procedural and regulatory compliance management</li> <li>• Ability to support the reconciliation process with problem disbursements</li> <li>• Working knowledge of financial transactions to ensure programmatic obligations and expenditures are within targets</li> <li>• Provide basic assistance with Procurement Initiation documents (Contracts) to include types (cost and fixed)</li> </ul>	<ul style="list-style-type: none"> <li>• Apply budget execution processes as it relates to the PPBE system with limited assistance</li> <li>• Apply competent skills in analyzing funds flow from HQ to echelons III and IV activities to ensure effective and appropriate usage</li> <li>• Apply sound financial acumen in commands concepts and processes of funds management and execution with minimal guidance</li> <li>• Ability to solve funds issues and reconciliation problems associated with funds disbursement</li> <li>• Knowledge of budget and financial analysis techniques. Working knowledge of Financial Management Regulation (FMR) volumes as related to execution of the budget and the ability to interpret basic execution guidance. Develops plan of action to mitigate deviation from plan</li> <li>• Knowledge of Triannual review validation</li> <li>• Intermediate knowledge of financial transactions and program spend plans to ensure programmatic obligations and expenditures are meeting or exceeding benchmarks and the ability to resolve any issues mitigating meeting the benchmarks. Ability to interpret information of financial transactions (i.e. funding document, contracts)</li> <li>• Ability to clearly articulate the status of program funds to a wide group of individuals to include subordinates, peers, and leadership with the ability to recommend and implement alternative solutions</li> <li>• General knowledge of procurement and contracting documentation required to execute contracts</li> </ul>	<ul style="list-style-type: none"> <li>• Comprehensive knowledge of the budget execution process including its relationship to PPBE as well as in-depth knowledge of funds flow from Congress to SYSCOMs to Programs to Activities</li> <li>• Intricate Knowledge of FM systems and methods of tracking budget execution sufficient to monitor funds usage in accordance with DoD, DoN, and activity guidance</li> <li>• Advanced Knowledge and ability to employ government and commercial best-practice methods, practices, and procedures for financial and economic management and analysis</li> <li>• Analytical conceptual knowledge of Triannual review validation and how to incorporate processes to improve reuse rate of funds</li> <li>• Complete understanding of procurement and contracting documentation required to execute contracts</li> <li>• Comprehensive knowledge and understanding of FMR, Policies and Procedures applicable to the program affiliated</li> </ul>	<ul style="list-style-type: none"> <li>• Expert knowledge of budget execution processes and procedures</li> <li>• Master in the ability to influence people and processes associated with budget execution</li> <li>• Overall analytical knowledge of the rules and processes to identify funding sources to solve funding issues, while ensuring compliance with applicable laws and regulations</li> <li>• Strong ability to interpret key financial guidance to apply processes and principles within the agency or program under budget execution</li> <li>• High level business acumen abilities to recommend reprogramming actions to solve funding issues. Presents and explains execution plan to Comptroller and higher levels</li> <li>• Strong ability to anticipate problems (i.e. fund issue or reconciliation) and recommends corrective actions and future strategies</li> <li>• Superior Team lead ability to work across Navy organizations to develop cross-SYSCOM best business practices as it relates to budget execution</li> <li>• Master in communications ability to develop and defend execution strategy to Echelon I and Comptroller organizations</li> <li>• Expertly and adeptly apply concepts and solutions using sound FM in applying interpretations of the FMR, Policies, and Procedures applicable to the program</li> </ul>

<b>Budget Execution Training</b>			
<b>Entry</b>	<b>Journeyman</b>	<b>Advanced</b>	<b>Expert</b>
<ul style="list-style-type: none"> <li>• Basic Finance Technician Course (BFTC) (OSD)</li> <li>• Financial Management 101 (OSD)</li> <li>• Appropriations Law Course (OSD)</li> <li>• Budget Execution (OSD)</li> <li>• Analyzing Funds Usage Documents</li> <li>• Anti-Deficiency Act (ADA)</li> <li>• BFM Boot Camp Manual</li> <li>• Fundamentals of NWCF</li> <li>• Budget Estimating Techniques</li> <li>• Appropriation Budget Execution Courses</li> </ul> <p>Courses can be found at FM MyLearn on the OSD Training website  <a href="https://fmonline.ousdc.osd.mil/FMmyLearn/">https://fmonline.ousdc.osd.mil/FMmyLearn/</a></p>	<ul style="list-style-type: none"> <li>• Financial Management Officer Course (FMOC) (OSD)</li> <li>• DoN Practical Comptrollership Course (OSD)</li> <li>• FWOC – Finance Warrant Officer Course (OSD)</li> <li>• Budget Execution (OSD)</li> <li>• Navy Procurement Process Overview PID PR</li> <li>• Various Appropriation Budget Execution Courses</li> <li>• Certified Defense Financial Management – Acquisition (CDFM-A)</li> <li>• Data Analysis</li> <li>• Navy Budget Policies &amp; Procedures</li> <li>• Rotational assignment in a PEO/Program Office or Competency (OJT)</li> <li>• Assessing Financial-Related Activities and Controls (Grad School)</li> <li>• Compliance Auditing (Grad School)</li> <li>• Internal Controls &amp; Accountability (Fed Training Ctr)</li> </ul>	<ul style="list-style-type: none"> <li>• Advance Resource Management Course (ARMC)</li> <li>• Advanced Financial Management Officer Course</li> <li>• Certified Defense Financial Management – Acquisition (CDFM-A)</li> <li>• Enhanced Defense Financial Management (EDFM) Course</li> <li>• Federal Appropriations Law Update</li> <li>• Rotational assignment in a PEO/Program Office or Competency (OJT)</li> </ul>	<ul style="list-style-type: none"> <li>• Financial Management Resource Officer Course</li> <li>• Advanced Finance Course</li> <li>• Mentor to Protégé in a PEO/Program Office or Competency (OJT)</li> </ul>

<b>Financial Systems Functionalities</b>			
The comprehensive understanding of financial systems and their functionalities. Knowledge of reporting capabilities and ability to utilize financial data to provide programmatic and financial recommendations to stakeholders.			
<b>Entry</b>	<b>Journeyman</b>	<b>Advanced</b>	<b>Expert</b>
<ul style="list-style-type: none"> <li>• Basic knowledge of financial systems and reporting requirements/capabilities</li> <li>• Ability to comprehend and provide basic financial data reports using FM systems, with guidance</li> <li>• Knowledge and ability to use financial information management systems and tools to monitor and control financial execution and extract meaningful funding metrics</li> </ul>	<ul style="list-style-type: none"> <li>• General knowledge of financial systems and reporting requirements/capabilities</li> <li>• Ability to understand and provide financial data reports using FM systems with minimal guidance</li> <li>• Understanding of relationships between various system transactions, various systems, and reports</li> <li>• Ability to identify minor system problems</li> </ul>	<ul style="list-style-type: none"> <li>• Working knowledge of financial systems, data derived from system, and reporting requirements/capabilities</li> <li>• Ability to efficiently generate both routine and non-routine reports and transactions</li> <li>• Ability to navigate within financial systems to obtain financial information that crosses numerous Comptroller disciplines</li> <li>• Ability to utilize disparate information within and across FM systems</li> <li>• Ability to generate ad hoc reports and understands the limitations of the financial data contained in the report and recognize when data is incomplete or missing</li> <li>• Ability to advise customers of issues and limitations related to a financial system</li> <li>• Ability to train other personnel on use of a financial system</li> <li>• Ability to identify more complex system problems and develop business rules that ensures efficiencies within financial systems</li> </ul>	<ul style="list-style-type: none"> <li>• Expert knowledge of higher level financial systems</li> <li>• Serves as the subject matter expert in financial systems and reporting/capabilities</li> <li>• Ability to independently assess the accuracy/integrity of the financial data pulled from the system</li> <li>• Ability to provide recommendations on system and business processes and reporting</li> <li>• Ability to influence people and processes to achieve better reporting</li> <li>• Ability to anticipate reporting needs of customers and is able to provide complex ad-hoc reports</li> <li>• Ability to answer higher level questions if data is not translating properly between systems and troubleshoot financial system issues</li> <li>• Ability to train other personnel on use of a financial system</li> <li>• Ability to understand in-depth how financial systems relates to other organizations and DoD data requirements</li> </ul>

<b>Financial Systems Functionalities Training</b>			
<b>Entry</b>	<b>Journeyman</b>	<b>Advanced</b>	<b>Expert</b>
<ul style="list-style-type: none"> <li>• STARS New User (NAVSISA)</li> <li>• Navy ERP PBFM (SYSCOM)</li> <li>• PRISMS New User (NAVSEA)</li> <li>• SLDCADA New User (DISA)</li> <li>• iRAPs New User (OPNAV N2/N6)</li> </ul>	<ul style="list-style-type: none"> <li>• MOCAS (NAVSISA)</li> <li>• PBIS New User (FMB)</li> <li>• Navy ERP Knowledge Transfers (SYSCOM)</li> </ul>	<ul style="list-style-type: none"> <li>• STARS Advanced Training (NAVSISA)</li> <li>• Navy ERP Super User Training (SYSCOM)</li> </ul>	<ul style="list-style-type: none"> <li>• SAP Certification (SAPCORP)</li> </ul>

**Accounting Principles and Policies**

The knowledge and understanding of both budgetary and proprietary Financial Accounting principles and polices associated with DoN funding appropriations. The ability to apply sound DoD accounting practices using the most current accepted principles and policies established. Ensure the requisite competencies are acquired to enable proper usage of accepted accounting principles, policies, and procedures are adhered.

Entry	Journeyman	Advanced	Expert
<ul style="list-style-type: none"> <li>• Basic knowledge of accounting principles and concepts, and able to apply accounting procedures and techniques to basic job tasks as required by the FMR and the Generally Accepted Government Auditing Standards (GAGAS) often referred to as the “Yellow Book”</li> <li>• Basic concept of budgetary and/or proprietary accounting in the transaction of goods or sales in the in reimbursable or direct cite categories</li> <li>• Basic knowledge of accounting systems and subsystems. Knowledge of funds usage and directives pertaining to appropriations</li> <li>• Ability to review financial transactions including maintaining and reconciling accounts through liquidation. Understanding of the integrated processes used to account for the receipt and use of budgetary authority</li> <li>• Ability to review financial transactions to ensure the availability of funds</li> </ul>	<ul style="list-style-type: none"> <li>• Understanding of general accounting procedures and processes in the FMR and GAGAS</li> <li>• Understanding in use of accounting systems and subsystems</li> <li>• Understanding of using budgetary and proprietary accounting information with some analysis and solution proposals. Ability to use sound decision-making process to update, review, or determine the accuracy/reliability of accounting data pertaining to costs for outputs and responsibility segments</li> <li>• Understanding of the laws, regulations, and directives pertaining to appropriations, funds usage, and overall program planning and development</li> <li>• Understanding of how to research and resolve accounting discrepancies with minimal guidance</li> </ul>	<ul style="list-style-type: none"> <li>• Working knowledge of general accounting procedures and processes contained in the FMR and GAGAS</li> <li>• Intimate and detailed knowledge of accounting systems and subsystems</li> <li>• Comprehensive knowledge of how to use budgetary and proprietary accounting information to analyze issues and provide solutions at a high degree of efficiency</li> <li>• Detailed knowledge of the laws, regulations, and various directives pertaining to appropriations, funds usage, and overall program planning and development. Systematic knowledge with the ability to identify attributes of the U. S. (SGL) Standard General Ledger accounts to specific agencies SGL accounts and analyze key accounting events</li> <li>• Ability to research and resolve accounting discrepancies with sound accounting principles and policies</li> <li>• Comprehensive working knowledge of financial reports leading to auditable financial statements, business process standardization and the Financial Improvement Program (FIP)</li> </ul>	<ul style="list-style-type: none"> <li>• Expert knowledge of the use of general accounting procedures and processes (GAGAS)</li> <li>• Highly skilled at identifying, conceptualizing and/or analyzing accounting issues and recommending alternative strategies to accounting and business processes</li> <li>• Expertly apply knowledge of accounting principles and other financial policies and procedures to local and national mission. Expert knowledge in the ability to identify attributes of the U. S. (SGL) Standard General Ledger accounts to specific agencies SGL accounts analyze key accounting events and use SGL crosswalks to advice on specific financial reports</li> <li>• Detailed Working knowledge of financial reports leading to auditable financial statements, business process standardization and the FIP</li> </ul>

<b>Accounting Principles and Policies Training</b>			
<b>Entry</b>	<b>Journeyman</b>	<b>Advanced</b>	<b>Expert</b>
<ul style="list-style-type: none"> <li>• Basic Finance Technician Course (BFTC) (OSD-Online)</li> <li>• Financial Management 101 (OSD-Online)</li> <li>• Navy Working Capital Fund - 101 (OSD-Online)</li> <li>• Introduction to Navy/Marine Corps Accounting (OSD-Online)</li> <li>• Introduction to Defense Agencies Accounting (OSD-Online)</li> <li>• Preparatory Accounting (OSD-Online)</li> <li>• FIAR101-Introduction to the Financial Improvement and Audit Readiness (FIAR) Guidance and Internal Control over Financial Reporting (ICOFR) (OSD-Online)</li> <li>• Introduction to Audit Readiness for Accounts Payable (OSD-Online)</li> <li>• Anti-Deficiency Act (OSD-Online)</li> <li>• Basic Governmental Accounting Intro to Management Information System for International Logistics (MISIL) (FMS) (Navy-Local)</li> </ul> <p>Courses can be found at FM MyLearn on the OSD Training website  <a href="https://fmonline.ousdc.osd.mil/FMmyLearn/">https://fmonline.ousdc.osd.mil/FMmyLearn/</a></p>	<ul style="list-style-type: none"> <li>• Financial Management Officer Course (FMOC) (OSD-Online)</li> <li>• DoN Practical Comptrollership Course (PCC) (NAVY-Pensacola)</li> <li>• Intermediate DFAS Accounting Principles (OSD-Online)</li> <li>• GAGAS (OSD-Online)</li> <li>• Budgeting and Accounting: Making The Connection (Navy-Local)</li> <li>• Practical Comptrollership Course (PCC)</li> </ul>	<ul style="list-style-type: none"> <li>• Advance Resource Management Course (ARMC) (OSD-Online)</li> <li>• Advanced Financial Management Officer Course (OSD-Online)</li> <li>• Rotational assignment in Comptroller (OJT)</li> <li>• Certified Defense Financial Manager -Acquisition (CDFM-A)</li> <li>• Enhanced Defense Financial Management (EDFM) Course</li> <li>• Practical Comptrollership Course (PCC) (Navy-Pensacola)</li> </ul>	<ul style="list-style-type: none"> <li>• Financial Management Resource Officer Course (OSD-Online)</li> <li>• Mentor to Protégé to comptroller personnel (OJT)</li> <li>• Certified Defense Financial Manager - Acquisition (CDFM-A)</li> </ul>

<b>Fiscal Law &amp; Policies</b>			
<p>The understanding of the body of law that governs the availability and use of federal funds. Knowledge of the process by which Government expenditures are authorized and funded as well as differentiates between the major types of appropriations and their uses.</p>			
<b>Entry</b>	<b>Journeyman</b>	<b>Advanced</b>	<b>Expert</b>
<ul style="list-style-type: none"> <li>• Basic knowledge and understanding of DoD procurement regulations, appropriations law and fiscal policy as they apply to multi-year acquisition programs</li> <li>• Basic knowledge of DoD appropriation and ability to execute different types of funding (Investment and Maintenance)</li> </ul>	<ul style="list-style-type: none"> <li>• General knowledge of appropriations and financial rules and regulations and ability to articulate more complex language associated with rulings and decisions</li> <li>• General knowledge of appropriation law and fiscal policy and ability to apply consistently with funding policies, processes and regulations</li> <li>• Ability to differentiate between funding document types, governing directives and policies for consistent and correct application</li> <li>• Knowledge of anti-deficiency and misappropriation violations</li> </ul>	<ul style="list-style-type: none"> <li>• Ability to apply financial policy to all levels of work and able to apply and interpret rules, regulations and directives to make both budget formulation and execution recommendations</li> <li>• Advanced understanding and fluent application of budget processes and techniques, as well as the ability to assist and lead others</li> <li>• Ability to ensure the use of proper appropriations and provides recommendations to avoid Anti-deficiency Act and misappropriation violations</li> </ul>	<ul style="list-style-type: none"> <li>• Demonstrates leadership skills in interpreting budget policies and regulations to influence outcomes</li> <li>• Ability to provide management and interpretation of the laws, regulations, and various directives pertaining to appropriations, funds usage, and overall program planning and development</li> <li>• Ability to apply financial policy to all levels of work</li> <li>• Expert knowledge includes advanced synthesis and application of complex budgeting concepts and techniques, as well as strategic knowledge and influence of financial processes</li> <li>• Routinely provides policy guidance to customers and co-workers and recommends one or more solutions or COAs. Ability to develop guidance, policy and business rules to support organizational goals and objectives</li> <li>• Interprets analysis in final decision making</li> </ul>
<b>Fiscal Law &amp; Policies Training</b>			
<b>Entry</b>	<b>Journeyman</b>	<b>Advanced</b>	<b>Expert</b>
<ul style="list-style-type: none"> <li>• Appropriations Law (FMB)</li> <li>• Appropriations Law Refresher &amp; Update (FMB)</li> <li>• Principles of Appropriations Law (FMB)</li> <li>• DoN Funds Usage Documents Course (FMB)</li> <li>• Principles of DoN Budgeting (FMB)</li> <li>• Fundamentals of NWCF (FMB on-line)</li> <li>• Rotation to Comptroller/Budget organization</li> </ul>	<ul style="list-style-type: none"> <li>• Principles of Appropriations Law (FMB)</li> <li>• Advanced Appropriations Law (FMB)</li> <li>• DoN Funds Usage Documents Course (FMB)</li> <li>• Principles of DoN Budgeting (FMB on-line)</li> <li>• Fundamentals of NWCF (FMB on-line)</li> <li>• Rotation to Comptroller/Budget organization</li> </ul>	<ul style="list-style-type: none"> <li>• Enhanced Defense Financial Management Course (PBIS)</li> <li>• Mid-Level Training Navy Financial Management (PBIS)</li> <li>• Practical Comptrollership Course (NPGS)</li> <li>• Certified Defense Financial Manager</li> <li>• Rotation to Comptroller/Budget organization</li> </ul>	

**Budget Formulation**

The understanding of the front-end process by which a specified budget is developed, justified, and defended. Budget formulation includes the Program Objectives Memorandum (POM) output, presentation of budget materials, and Congressional briefings to Professional Staff Members (PSM).

Entry	Journeyman	Advanced	Expert
<ul style="list-style-type: none"> <li>• Basic knowledge of the formulation of a budget and the relationship to PPBE</li> <li>• Assist in preparing budget request materials (exhibits)</li> <li>• Knowledge of the difference between the three budget cycles (DoN, OSD, and PB).</li> <li>• Understanding the Congressional enactment process</li> <li>• Knowledge of the Resource Management Decision (RMD) process</li> <li>• Familiar with purpose, time and amount rules for developing budget requests</li> <li>• Knowledge of basic contracting types (Cost and Fixed)</li> <li>• Knowledge of the four basic methods used for cost estimating</li> <li>• Knowledge of the Program Objectives Memorandum (POM) process and how it translates to the formulation process</li> </ul>	<ul style="list-style-type: none"> <li>• General knowledge of formulating a budget and the relationship it has to the PPBE process with minimal guidance</li> <li>• Ability to prepare budget exhibits with minimal guidance ensuring program plans are executable, justifiable, and defensible</li> <li>• In-depth understanding of the three budget cycles each Fiscal Year</li> <li>• Ability to produce each budget for comptroller review, with minimal discrepancies</li> <li>• Ability to provide input for Congressional briefings to professional staff members that support the PB submission</li> <li>• Ability to verbally, and in writing, defend the programs position with minimum guidance</li> <li>• Ability to research the Financial Management Regulation (FMR), Federal Acquisition Regulation (FAR)/Defense FAR to present policy that supports decisions</li> <li>• In-depth understanding of contract types and potential impact on funding decisions</li> <li>• Ability to determine proper cost estimating methods consistent with the phase of the program</li> <li>• Understanding of escalation indices and the ability to apply indices to budget materials</li> <li>• Knowledge of the POM process and how it translates to the formulation process</li> </ul>	<ul style="list-style-type: none"> <li>• Subject matter expert in the formulation of a budget and the relationship to the overall DoD budget</li> <li>• Ability to prepare budget exhibits independently ensuring program plans are executable, justifiable, and defensible</li> <li>• Knowledge of budget elements such as labor, non-labor and working capital fund purchases and contractor support services in the importance of properly reflecting these categories in budget submissions</li> <li>• Ability to anticipate requirements for various budget cycles and correctly time events for updates, changes, and corrections</li> <li>• Ability to develop program inputs to Congressional briefs, hearings and testimony</li> <li>• Ability to prepare Defense Acquisition Executive Summary (DAES) and the Selected Acquisition Report (SAR)</li> <li>• Ability to provide input for narrative justifications regarding program business and financial issues, questions, marks, reclaims, and impact statements</li> <li>• Interprets and applies policy and guidance from higher headquarters during the formulation process</li> <li>• Ability to assist in the development of contract strategies based on knowledge of contract types and their impact on budget formulation</li> <li>• Ability to translate cost models and cost analysis into defensible budget exhibits</li> <li>• Ability to train and mentor personnel on all aspects of budget formulation</li> </ul>	<ul style="list-style-type: none"> <li>• Expert knowledge of budget formulation processes, policy, and guidance. Mentor, train and lead others in the application of these processes during formulation</li> <li>• Expert in the preparation and review of budget exhibits and related materials ensuring the application of all appropriate rules and financial regulations</li> <li>• Ability to interpret policy, determine proper timing , and anticipate cause/effect of changes to the outcome of the budget review process and to recommend changes to senior management on budget issues</li> <li>• Represent the Budget Submitting Office (BSO) at higher level budget reviews and meetings</li> <li>• Ability to prepare responses to higher authority regarding program and financial impacts, to include reclama statements and positions, current year status and budget year financial plans, and phasing plan deviations</li> <li>• Lead the FM staff in the development of all impacts statements, marks, reclaims, and questions for the record related to the formulation process</li> <li>• Represent the BSO in the defense of program positions</li> <li>• Subject matter expert on applying FAR/DFAR, FMR, and other policy and guidance in the development of formulation material</li> <li>• Leads team in development of effective contract strategies to ensure cost effective measures are considered during budget formulation</li> </ul>

			<ul style="list-style-type: none"> <li>• Ability to present and defend the rationale used in determining specific cost models and to translate cost models and cost analysis into defensible budget exhibits</li> <li>• Ability to influence people and processes. Serves as the lead for assigned areas, reviews budget exhibits or summary budget documentation prepared by personnel to ensure compliance with DoD direction</li> </ul>
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<b>Budget Formulation Training</b>			
<b>Entry</b>	<b>Journeyman</b>	<b>Advanced</b>	<b>Expert</b>
<ul style="list-style-type: none"> <li>• Fiscal Law Course (On-Line)</li> <li>• FM 101 (PBIS On-Line)</li> <li>• PPBE (USDA)</li> <li>• Intro to FM (USDA)</li> <li>• Budget Formulation (USDA)</li> <li>• OJT – Appropriation Usage</li> <li>• OJT – Budget Formulation (to include detailed budget exhibit prep/review)</li> <li>• OJT – Funds Allocation Process (FADS, Systems Input)</li> <li>• OJT – ATRs/BTRs</li> <li>• OJT - Mid-Year Execution Review Process</li> <li>• OJT - Phasing Plan Process</li> <li>• OJT - Systems Training (official/non-official)</li> <li>• OJT - Budget Execution (to include FY Close-Out/Reconciliation)</li> <li>• Rotation – Comptroller Allocation (1 week)</li> <li>• Rotation – Program Office (1 month)</li> </ul>	<ul style="list-style-type: none"> <li>• Funds Usage (DoN On-Line)</li> <li>• Federal Budget Process (USDA)</li> <li>• Practical Comptrollership Course (Navy/U.S. Marine Corps)</li> <li>• Enhanced Defense Financial Management training (EDFMT) Course (to include Acquisition Course)</li> <li>• OJT - Program Reviews</li> <li>• OJT - Managerial Accounting</li> <li>• OJT - New Fiscal Year Start-Up Processes</li> <li>• OJT - Congressional Actions and Processes</li> <li>• OJT – Resource Management Decision (RMD) Analysis</li> <li>• Rotation - Higher Headquarters (1 month)</li> <li>• Rotation – FMB (timed to budget submission) (2 months)</li> </ul>		

<b>Financial Reporting</b>			
The understanding and support of Acquisition Reporting, Financial Statements, Audit Readiness reporting, Execution Status, and Reports extracted from FM systems.			
Entry	Journeyman	Advanced	Expert
<ul style="list-style-type: none"> <li>• Basic knowledge of various financial reports and the purpose of each, to include all financial statement reporting</li> <li>• Basic knowledge of acquisition reporting requirements such as Defense Acquisition Executive Summary (DAES) and Selected Acquisition Report (SAR)</li> <li>• Basic knowledge of execution status reporting and explanation requirements for variances</li> </ul>	<ul style="list-style-type: none"> <li>• Knowledge of various financial reports and ability to provide input into the development, to include all financial statement reporting</li> <li>• Knowledge of acquisition reporting requirements such as Defense Acquisition Executive Summary (DAES) and Selected Acquisition Report (SAR) and ability to provide input</li> <li>• Knowledge of execution status reporting and explanation requirements for variances</li> <li>• Knowledge of Command Assessments, Managers' Internal Control Program (MICP) and Financial Improvement and Audit Readiness Programs (FIAR)</li> <li>• Ability to assist in reviewing and editing financial reports leading to certified and auditable financial statements, and to recommend corrective actions</li> </ul>	<ul style="list-style-type: none"> <li>• Advanced knowledge of various financial reports and ability to provide analysis on data reported</li> <li>• Advanced knowledge of acquisition reporting requirements and ability to provide analysis of data</li> <li>• Ability to efficiently generate both routine and non-routine reports, charts, and graphs</li> <li>• Ability to navigate within financial systems to obtain financial information that crosses numerous FM disciplines</li> <li>• Ability to utilize disparate information within and across FM systems</li> <li>• Ability to comprehend business and financial data collection techniques</li> <li>• Ability to develop program inputs to DAES and SAR</li> <li>• Advanced knowledge of Command Assessments, Managers' Internal Control Program (MICP) and Financial Improvement and Audit Readiness Program (FIAR)</li> </ul>	<ul style="list-style-type: none"> <li>• Expert knowledge of various different financial reports and able to provide expert analysis on data reported</li> <li>• Expert knowledge of acquisition reporting requirements and able to provide expert analysis of data</li> <li>• Ability to lead and mentor others to generate both routine and non-routine reports, charts, and graphs</li> <li>• Expert ability to navigate within financial systems to obtain financial information that crosses numerous FM disciplines</li> <li>• Expert ability to comprehend business and financial data collection techniques</li> <li>• Expert knowledge of Command Assessments, Managers' Internal Control Program (MICP) and Financial Improvement and Audit Readiness Program (FIAR)</li> <li>• Ability to influence people and processes to achieve better reporting</li> </ul>

<b>Financial Reporting Training</b>			
<b>Entry</b>	<b>Journeyman</b>	<b>Advanced</b>	<b>Expert</b>
<ul style="list-style-type: none"> <li>• OJT - Command wide reporting</li> <li>• Preparation and Analysis of the SF 133 (Management Concepts)</li> <li>• Preparing Federal Financial Statements Using the U.S. Standard General Ledger (Management Concepts)</li> <li>• Financial Management 101 (OSD)</li> <li>• Fundamentals of System Acquisition Management (DAU ACQ 101)</li> <li>• Fundamentals of Business Financial Management (DAU BCF 103)</li> </ul>	<ul style="list-style-type: none"> <li>• Preparation and Analysis of the SF 133 (Management Concepts)</li> <li>• Preparing Federal Financial Statements Using the U.S. Standard General Ledger (Management Concepts)</li> <li>• Acquisition Reporting for MDAP and MAIS (DAU BCF 209)</li> <li>• Acquisition Business Management Concepts (DAU BCF 220)</li> <li>• Acquisition Business Management Application (DAU BCF 225)</li> <li>• Federal Agencies' Centralized Trial-Balance System -FACTS II (FMS.TRES.GOV)</li> <li>• Understanding Federal Financial Statements (Grad School)</li> </ul>	<ul style="list-style-type: none"> <li>• Preparation and Analysis of the SF 133 (Management Concepts)</li> <li>• Preparing Federal Financial Statements Using the U.S. Standard General Ledger (Management Concepts)</li> <li>• Program Performance Measurement &amp; Acquisition Reporting for Prog Mgrs: Senior Level (Private Vendor)</li> </ul>	<ul style="list-style-type: none"> <li>• Preparation and Analysis of the SF 133 (Management Concepts)</li> <li>• Preparing Federal Financial Statements Using the U.S. Standard General Ledger (Management Concepts)</li> <li>• Senior Acquisition Course (DAU ACQ 401)</li> <li>• Defense Acquisition Executive Overview Workshop (DAU ACQ 403)</li> </ul>

<b>Financial &amp; Economic Analysis</b>			
The ability to forecast, analyze, reconcile and recommend strategies utilizing programmatic and financial data to provide sound advice in accordance with fiscal policies and regulations.			
<b>Entry</b>	<b>Journeyman</b>	<b>Advanced</b>	<b>Expert</b>
<ul style="list-style-type: none"> <li>• Basic knowledge of financial analysis, to include, identifying the stages of encumbrance, plan to actual comparisons, and other statistical methods sufficient to assist in the preparation of periodic status reports and to provide basic analysis</li> <li>• Basic knowledge of how performance measures support organizational goals</li> <li>• Knowledge of the existence of performance measures such as obligation/expenditure benchmarks for various appropriations, cash levels, unobligated balances, etc.</li> <li>• Ability to assist in researching and analyzing issues to support acquisition program goals</li> </ul>	<ul style="list-style-type: none"> <li>• Knowledge of predictive and trend analyses, and plan-to-actual comparative analyses to identify assets/shortfalls/buying power as well as analytical stages of encumbrance, and other statistical methods</li> <li>• Basic knowledge of financial analysis, forecasting, and planning sufficient to ensure forecasts, plans, and strategies are consistent with DoD-wide goals and strategic initiatives</li> <li>• Basic knowledge and understanding of the concepts, principles and methods appropriate to cost and economic analysis, and the relationship to acquisition and support strategies</li> <li>• Ability to assist in defining financial goals and contingency plans and provide support to senior management</li> <li>• Ability to utilize performance measure to support organizational goals and their impacts</li> <li>• Ability to utilize performance measures to validate program funds usage to include obligation/expenditure benchmarks</li> <li>• Ability to analyze and recommend adjustments to plans in response to funding reductions and deferrals, emerging requirements, and cost growth or saving</li> <li>• Ability to perform financial reconciliations, resolve financial discrepancies and analyze outputs to detect deviations from proposed budget plan, with little supervision</li> </ul>	<ul style="list-style-type: none"> <li>• Advanced knowledge of predictive and trend analyses to aid decision makers</li> <li>• Ability to perform high level data analysis using prescribed tools, and to organize information for additional analysis</li> <li>• Ability to provide authoritative commentary to higher levels on business information and performance</li> <li>• Advanced knowledge of financial analysis, stages of encumbrance, research, forecasting, and planning sufficient to produce financial information and support decision making</li> <li>• Detailed knowledge of performance measures as they relate to DoD objectives and ability to recommend alternative courses of action should performance measures not be on target</li> <li>• Ability to modify standard practices and adapt techniques to approach a variety of programmatic problems and issues</li> <li>• Ability to prepare responses and make presentations to higher authority regarding program and financial impacts, including reclama statements</li> <li>• Knowledge of work measurement, capacity analysis, aggregate planning, resource allocation and leveling, time series analysis and budgeting, earned value management, statistical process analysis and optimization, demand forecasting and other financial aspects of strategic planning</li> </ul>	<ul style="list-style-type: none"> <li>• Expert knowledge of and ability to refine and use predictive, trend and plan-to-actual comparative analysis to make organizational-level decisions or change business strategies</li> <li>• Expert knowledge of financial analysis, research, forecasting, and planning sufficient to produce financial information and make decisions</li> <li>• Skilled at using analytical reasoning to identify, analyze, and resolve problems</li> <li>• Ability to support business &amp; financial activities of increasing complexity and expanded responsibility concerning policy and program implications</li> <li>• High degree of skill in identifying and/or analyzing business financial issues and developing alternative strategies (by synthesizing information from various disciplines such as EVM, PPBS, and cost estimating) to resolve conflicting goals</li> <li>• Provides in-depth management decision analysis to executive leadership including ROI calculations, BCAs, Forecasts and Projections</li> </ul>

<b>Financial &amp; Economic Analysis Training</b>			
<b>Entry</b>	<b>Journeyman</b>	<b>Advanced</b>	<b>Expert</b>
<ul style="list-style-type: none"> <li>• BCF 107 Applied Cost Analysis (DAU)</li> <li>• CLC 024 Basic Math Tutorial (DAU)</li> <li>• BCF 206 Cost Risk Analysis (DAU)</li> <li>• BCF 207 Economic Analysis (DAU)</li> <li>• Introduction to Excel (DoN HR)</li> <li>• Introduction to Access (DoN HR)</li> <li>• Introduction to PowerPoint (DoN HR)</li> <li>• Business Acquisition Conference (DAU)</li> <li>• Rotation to Cost Analysis/EVM organization</li> </ul>	<ul style="list-style-type: none"> <li>• CLB 014 Acquisition Reporting Concepts &amp; Policy Requirements for PB, DAES, and SAR (DAU)</li> <li>• BCF 204 Intermediate Cost Analysis (DAU)</li> <li>• BCF 206 Cost Risk Analysis (DAU)</li> <li>• BCF 207 Economic Analysis (DAU)</li> <li>• BCF 215 Operating and Support Cost Analysis (DAU)</li> <li>• BCF 262 EBMS Validation and Surveillance (DAU)</li> <li>• Practical Comptroller Course (NPS)</li> <li>• Intermediate/Advanced Excel (DoN HR)</li> <li>• Intermediate/Advanced Access (DoN HR)</li> <li>• Intermediate/Advanced PowerPoint (DoN HR)</li> <li>• Rotation to Cost Analysis/EVM organization</li> </ul>	<ul style="list-style-type: none"> <li>• CLL 015 Product Support Business Case Analysis (DAU)</li> <li>• CON 112 Mission-Performance Assessment (DAU)</li> <li>• Using Performance Metrics to Improve Program Effectiveness (Management Concepts)</li> <li>• Building Business Cases (Management Concepts)</li> <li>• Cost and Price Analysis (Management Concepts)</li> <li>• Business Acquisition Conference (DAU)</li> <li>• Rotation to Cost Analysis/EVM organization</li> </ul>	<ul style="list-style-type: none"> <li>• Business Acquisition Conference (DAU)</li> </ul>

<b>Acquisition Planning</b>			
The knowledge of the DoD 5000 Instruction and its governance and interaction with Decision Support Systems (PPBE process, JCIDS, and DAMS). Acquisition Planning is event driven and consists of various milestones. Key activities are performed during each milestone to provide for informed decision making and are consistent with PPBE phases.			
<b>Entry</b>	<b>Journeyman</b>	<b>Advanced</b>	<b>Expert</b>
<ul style="list-style-type: none"> <li>• Basic understanding of the relationship between DoD 5000 Acquisition Regulations and the PPBE budget process</li> <li>• Basic understanding of the role of acquisition milestones in the development of program budgets</li> <li>• Basic understanding of the role of various contract types and their effect on planning.</li> <li>• Basic understanding of schedule impacts on program planning</li> <li>• Basic understanding of project management methodologies and reporting</li> </ul>	<ul style="list-style-type: none"> <li>• Understanding of the concepts and interactions between DoD Acquisition and PPBE during the planning and execution processes</li> <li>• Ability to work in a team environment and contribute financial advice during the planning and execution processes</li> <li>• Understanding the relationship of milestones and other acquisition events based on cost, schedule, and performance</li> <li>• Working knowledge of the various types of contracts and their effect on cost and schedule during R&amp;D and Procurement phases</li> <li>• Understanding of the timing and interactions of schedule events and their effect on financial planning activities</li> <li>• Knowledge of project management methodologies and reporting</li> </ul>	<ul style="list-style-type: none"> <li>• Ability to apply financial rules and regulations into acquisition schedule and budget planning to ensure the creation of defensible budgets</li> <li>• Act as the IPT FM subject matter expert (SME) to the team providing advice and guidance in ensuring the integration of financial rules and regulations into the development of the program schedule</li> <li>• Ability to use the program planning events and milestone process to recommend schedule adjustments and develop accurate acquisition and financial plans</li> <li>• Ability to advise on various contract types during the planning process depending on the risk (i.e. cost Plus vs. award Fee)</li> <li>• Ability to influence events on the program schedule by applying financial policy and regulations</li> <li>• Functional knowledge of project management concepts, tools, and interdependencies</li> </ul>	<ul style="list-style-type: none"> <li>• Expert knowledge in understanding the interactions between cost, schedule and performance requirements in acquisition planning and the skill to plan or apply corrective action to ensure executability</li> <li>• Ability to lead an IPT and to train or influence others in the development of program schedules</li> <li>• Ability to diagnose problems and provide corrective actions to ensure program executability.</li> <li>• Expertise in developing and adjusting the program schedule by using cost, schedule and performance lead times, and programmatic events and to use the data to develop accurate financial plans based on realistic schedules</li> <li>• SME for advising senior leadership on the benefits and risks (i.e. execution, cost risk, etc.) of each type of contract during the planning process</li> <li>• Expertise in applying schedule and financial guidance and briefing to senior leadership</li> </ul>

<b>Acquisition Planning Training</b>			
<b>Entry</b>	<b>Journeyman</b>	<b>Advanced</b>	<b>Expert</b>
<ul style="list-style-type: none"> <li>• DAU Formal Training</li> </ul>	<ul style="list-style-type: none"> <li>• DAU Formal Training</li> <li>• OJT – Abbreviated Acquisition Program (AAP)</li> <li>• Rotation – Program Office with Major Automated Information System (MAIS) programs</li> </ul>	<ul style="list-style-type: none"> <li>• DAU Formal Training</li> <li>• OJT – Acquisition Category I (ACAT) Programs</li> <li>• Rotation – PEO</li> </ul>	<ul style="list-style-type: none"> <li>• DAU Core Leadership Training</li> <li>• Employee Leadership Development Program (ELDP)</li> </ul>

<b>Audit Readiness</b>			
The understanding of all policies and concepts associated with establishing and maintaining internal controls in accordance with DoD guidance. Also provides analysis and support to auditing activities such as documentation retention, substantive control testing, and business process improvement.			
<b>Entry</b>	<b>Journeyman</b>	<b>Advanced</b>	<b>Expert</b>
<ul style="list-style-type: none"> <li>• Basic knowledge of DoD audit initiatives such as Managers' Internal Control Program (MICP) and the Financial Improvement and Audit Readiness Programs (FIAR) to include a basic understanding of internal controls, FIAR priorities and strategies</li> <li>• Familiarity with OMB Circular A-123 Appendix A, Government Auditing Standards (yellow book), the CFO Act of 1990, the Government Management and Reform Act of 1994, Federal Manager Financial Integrity Act of 1982 (FMFIA), and the Federal Financial Management Improvement Act (FFMIA)</li> </ul>	<ul style="list-style-type: none"> <li>• Knowledge of audit ready initiatives and ability to apply concepts to everyday activities</li> <li>• Ability to support MICP and FIAR tasks of gathering sample documentation</li> <li>• Ability to support internal control and substantive control testing with aid of auditing personnel</li> <li>• Ability to implement management internal controls to ensure audit compliance</li> </ul>	<ul style="list-style-type: none"> <li>• Working knowledge of internal control and audit readiness requirements</li> <li>• Ability to provides strategic input into the development of auditable financial processes, which include key internal controls identified by Office of Financial Operations (FMO)</li> <li>• Ability to direct internal actions associated with substantive control testing</li> <li>• Ability to implement management internal controls to ensure audit compliance and analysis ineffective controls</li> </ul>	<ul style="list-style-type: none"> <li>• Expert knowledge of internal control and audit readiness requirements</li> <li>• Ability to coordinate with senior leadership and stakeholders to address complex audit requests affecting the Acquisition programs</li> <li>• Serves as the lead for implementation of corrective actions and ability to lead the organization through implementation of auditable business processes</li> <li>• Liaises with organizations performing an audit and directs internal actions associated with substantive control testing</li> </ul>

<b>Audit Readiness Training</b>			
<b>Entry</b>	<b>Journeyman</b>	<b>Advanced</b>	<b>Expert</b>
<ul style="list-style-type: none"> <li>• FIAR 100 - Financial Improvement and Audit Readiness Essential Concepts (OSD)</li> <li>• FIAR 101 - Introduction to FIAR guidance and Internal Controls over Reporting (ICOFR) (OSD)</li> <li>• FIAR 102 - FIAR Methodology for Reporting Entities and ICOFR Deliverables (OSD)</li> <li>• FIAR 103 - FIAR Methodology for Service Providers (OSD)</li> <li>• Certified Internal Auditor (CIA) Preparatory Course 5-day (Management Concepts)</li> <li>• Auditing Fundamentals in the Federal Environment (Management Concepts)</li> <li>• Keeping the Audit on Track: Critical Skills for Audit Managers (Management Concepts)</li> </ul>	<ul style="list-style-type: none"> <li>• FIAR 201 - FIAR Appropriations Received (Wave 1) (OSD)</li> <li>• FIAR 202- FIAR Statement of Budgetary Resources (Wave 2) and Existence and Completeness of Mission Critical Assets (Wave 3) (OSD)</li> <li>• Certified Internal Auditor (CIA) Preparatory Course 5-day (Management Concepts)</li> <li>• Auditing Fundamentals in the Federal Environment (Management Concepts)</li> <li>• Keeping the Audit on Track: Critical Skills for Audit Managers (Management Concepts)</li> <li>• Assessing Financial-Related Activities and Controls (Grad School)</li> <li>• Compliance Auditing (Grad School)</li> <li>• Internal Controls &amp; Accountability (Fed Training Ctr)</li> </ul>	<ul style="list-style-type: none"> <li>• FIAR 301 - In-depth Review of Management's Responsibilities for Information Technology (IT) Controls When Preparing for a Financial Statement Audit (OSD)</li> <li>• Certified Internal Auditor (CIA) Preparatory Course 5-day (Management Concepts)</li> <li>• Auditing Fundamentals in the Federal Environment (Management Concepts)</li> <li>• Keeping the Audit on Track: Critical Skills for Audit Managers (Management Concepts)</li> <li>• Intermediate Performance Auditing (Grad School)</li> </ul>	<ul style="list-style-type: none"> <li>• Certified Internal Auditor (CIA) Preparatory Course 5-day (Management Concepts)</li> <li>• Auditing Fundamentals in the Federal Environment (Management Concepts)</li> <li>• Keeping the Audit on Track: Critical Skills for Audit Managers (Management Concepts)</li> </ul>

## **Leadership Development and Training Opportunities**

Leadership development is recognized at all levels of an organization. The leadership competencies outlined on the following pages are needed to build a federal corporate culture that drives results, serves customers, and builds successful teams and coalitions within and outside the organization. Many of the identified leadership competencies were adopted from Office of Personnel Management (OPM) Executive Core Qualifications, which are used by departments and agencies for selection, performance management, and leadership development for management and executive positions.

Entry Level – Leadership Competencies		
<p><b>Attention to Detail</b> – Skilled in considering all aspects involved in accomplishing a task; precisely follows procedures to ensure each element of a task is accurately completed.</p>	<p><b>Continual Learning</b> – Grasps the essence of new information; masters new technical and business knowledge; recognizes own strengths and weaknesses; pursues self-development; seeks feedback from others and opportunities to master new knowledge.</p>	<p><b>Cooperation/Teamwork</b> – Active contributes to achieving team goals. Recognizes and shares credit for success and promotes wide ownership. Treats others with courtesy, sensitivity, and respect. Consistently develops and sustains open, candid and trusting working relationships with fellow employees. Considers and responds appropriately to different people in different situations. Develops skills in observation, listening and one-on-one teaching. Contributes actively to the constructive resolution of conflict.</p>
<p><b>Critical Thinking</b> – Skilled in assessing the authenticity, accuracy, and value of information; uses logic reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems.</p>	<p><b>Flexibility</b> – Is open to change and new information; adapts behavior and work methods in response to new information, changing conditions, or unexpected obstacles. Adjusts rapidly to new situations warranting attention and resolution.</p>	<p><b>Customer Focus</b> – Actively seeks customer input. Anticipates and meets the needs of both internal and external customers. Delivers high-quality products and services; is committed to continuous improvement.</p>
<p><b>Dependability</b> – Skilled in displaying the self-discipline and resolve to reliably complete tasks in a timely manner.</p>	<p><b>Initiative</b> – Offers own ideas for improvement and to promote the goals of the organization.</p>	<p><b>Interpersonal Skills</b> – Considers and responds appropriately to the needs, feelings, and capabilities of different people in different situations; is tactful, compassionate and sensitive, and treats others with respect.</p>
<p><b>Professionalism</b> – Exemplifying the characteristics, qualities, and conduct expected in a profession.</p>	<p><b>Stress Tolerance</b> – Skilled in retaining composure and responds calmly and effectively to high stress situations. <i>(Leading People)</i></p>	<p><b>Communication</b> – Makes clear and convincing oral presentations to individuals or groups; listens effectively and clarifies information as needed; facilitates an open exchange of ideas and fosters an atmosphere of open communication. Expresses facts and ideas in writing in a clear, convincing and organized manner.</p>

<b>Entry Level - Leadership Training</b>	
<b>Course Title</b>	<b>Vendor</b>
Building High Performance Organizations for the 21st Century	Office of Personnel Management (OPM)
Acquisition Intern Leadership Development	Defense Acquisition University (DAU)
Aspiring Leader Program	DoN Office of Civilian Human Resources (OCHR)
New Leader Program	DoN OCHR
Naval Acquisition Development Program	Naval Acquisition Career Center (NACC)

Journeyman Level – Leadership Competencies		
<b>Instructing</b> – Teaching others how to do something.	<b>Active Learning</b> – Understanding the implications of new information for both current and future problem-solving and decision-making.	<b>Monitoring</b> – Assessing performance of yourself, others or organizations to make improvements or take corrective action.
<b>Conflict Management</b> – Identifies and takes steps to prevent potential situations that could result in unpleasant confrontations. Manages and resolves conflicts and disagreements in a positive and constructive manner to minimize negative impact.	<b>Risk Management</b> – Proactively identifies, assesses and manages risks to enhance mission accomplishment. Considers risk in assessing situations and making decisions. Identified potential risks to product/program/processes early and implements effective abatement or control measures.	<b>Creativity and Innovation</b> – Develops new insights into situations and applies innovative solutions to make organizational improvements; creates a work environment that encourages creative thinking and innovation; designs and implements new or cutting-edge programs/processes.
<b>Team Building</b> – Inspires, motivates, and guides others toward goal accomplishments. Consistently develops and sustains cooperative working relationships. Encourages and facilitates cooperation within the organization and with customer groups; fosters commitment, team spirit, pride, trust. Develops leadership in others through coaching, mentoring, rewarding, and guiding employees.	<b>Technology Management</b> – Uses efficient and cost-effective approaches to integrate technology into the workplace and improve program effectiveness. Develops strategies using new technology to enhance decision-making. Understands the impact of technological changes on the organization.	<b>Situational Leadership</b> – Demonstrates and encourages high standards of behavior. Clearly communicates and reaches agreement on performance expectations. Actively guides, motivates and empowers others. Demonstrates flexible leadership style; is able to provide direction or support to others as appropriate. Effectively adapts leadership style to situations and people.
<b>Accountability</b> – Assures that effective controls are developed and maintained to ensure the integrity of the organization. Holds self and others accountable for rules and responsibilities. Can be relied upon to ensure that projects within areas of specific responsibility are completed in a timely manner and within budget. Monitors and evaluates plans; focuses on results and measuring attainment of outcomes.	<b>Process Management</b> – Demonstrates the ability to examine systems and workflows within the organization, and leads efforts to streamline processes and adopt best practices. Translates customer requirements and organizational strategies into operational results by identifying supporting goals, work processes and tasks along with individual accountabilities. Understands and applies quality principles such as teamwork, quantitative decision-making and continuous process improvement using best-practice methodologies such as Lean Six Sigma (LSS) to meet or exceed customer expectations.	<b>Managing Customer Relationships</b> – Balancing interests of a variety of clients, readily readjusts priorities to respond to pressing and changing client demands. Anticipates and meets the need of clients; achieves quality end products; is committed to continuous improvement of services
<b>Decisive Problem Solving</b> – Identifies and analyzes problems; distinguishes between relevant and irrelevant information to make logical decisions; provides solutions to individual and organizational problems.		

Journeyman Level - Leadership Training	
Course Title	Vendor
Naval Acquisition Development Program	NACC
Acquisition Journeyman Leadership Development	DAU
Communicating Face to Face	OPM
Conflict Resolution Skills	OPM
Executive Leadership Program	DoN OCHR
Facilitation Skills for Leaders	OPM
Leadership Skills for Non-Supervisors	OPM
Leading Through Constructive Conflict	OPM
Management Development Seminar I: Leading from the Middle	OPM
Team Development Seminar I: Team Building	OPM
The Supervisory Development Seminar I: Fundamentals	OPM
Effects, Metrics, Risk in Strategic Planning (EMRSP) Workshop	Naval Postgraduate School (NPS)

Advanced Level – Leadership Competencies		
<p><b>Employee Performance Management</b> – Supervisor is proficient in setting and clearly communicating high expectations for performance, conveying confidence in employees’ ability to achieve challenging goals and overcome obstacles. Effectively diagnoses performance situations and uses appropriate leadership interventions to guide, coach, counsel and reward employees. Ensures employees are trained and capable; encourages employees to stay informed about new business processes and technology. Ensures effective recognition, training, development assignments, and corrective disciplinary actions. Behaves in a fair and ethical manner when evaluating employees’ performance. Appraises individual’s strengths and weaknesses and provides constructive feedback on performance.</p>	<p><b>Change Management</b> – Serves as a positive agent for changes in the organization’s structural alignment, climate or operational processes. Learns about, proactively advocates and influences the adoption of promising new ideas, methods, services and products from the best practices in government and industry. Considers factors such as workforce readiness, intended and unintended consequences, and the organization’s capacity for change to facilitate change in a manner that is efficient and effective.</p>	<p><b>Human Capital Management</b> – Builds and manages the workforce based on organizational goals, budget considerations, and staffing needs; ensures that employees are appropriately recruited, selected, appraised and rewarded; takes action to address performance problems; manages a multi-sector workforce and a variety of work situations.</p>
<p><b>Resource Management</b> – Skilled in determining how money will be spent to get the work done, and accounting for these expenditures; skilled in obtaining and seeing to the appropriate use of equipment, facilities and materials needed to do certain work; skilled in motivating, developing, and directing people as they work, identifying the best people for the job.</p>	<p><b>Entrepreneurship</b> – Identifies opportunities to develop and market new products and services within or outside of the organization. Is willing to take risks; initiates actions that involve a deliberate risk to achieve a recognized benefit or advantage.</p>	<p><b>Technical Credibility</b> – Understands and appropriately applies procedures, requirements, regulations, and policies related to specialized expertise. Is able to make sound hiring and capital resource decisions and to address training and development needs. Understands linkages between administrative competencies and mission needs.</p>
<p><b>Resilience</b> – Deals effectively with pressure; remains optimistic and persistent, even under adversity; recovers quickly from setbacks.</p>	<p><b>Mentorship/Developing Others</b> – Provides guidance and develops the ability of others to perform and contribute to the organization by providing ongoing feedback and by providing opportunities to learn through formal and informal methods.</p>	<p><b>Leveraging Diversity</b> – Fosters an inclusive workplace where diversity and individual differences are valued and leveraged to achieve the vision and mission of the organization.</p>
<p><b>Leadership</b> – Skilled in motivating and guiding others towards goals; instills commitment to a common image and shared values.</p>		

Advanced Level - Leadership Training	
Course Title	Vendor
Effects, Metrics, Risk in Strategic Planning (EMRSP) Workshop	NPS
Crisis Leadership Workshop	OPM
Defense Civilian Emerging Leader Program (DCELP)	Civilian Personnel Management Service (CPMS)
Executive Development Seminar: Leading Change	OPM
Executive Leadership Development Program	CPMS
Leader as Coach (ACQ 453)	DAU
Leading Across Generations	OPM
Management Development Seminar II: Leading Organizations	OPM
Managing Performance Seminar	OPM
Managing the Flexible Workplace	OPM
Senior Service College Fellowship	DAU
Team Development Seminar II: Team Leadership	OPM
The Supervisory Development Seminar II: Learning to Lead	OPM
Coaching and Mentoring for Excellence	OPM

Engaging and Encouraging Employees	OPM
Federal Executive Institute/Leadership for a Democratic Society	OPM
Industrial College of the Armed Forces	National Defense University (NDU)
Public Sector Leadership: Vision, Values and Vital Strategies	OPM
Strategic Communication Workshop	NPS

Expert Level – Leadership Competencies		
<p><b>External Awareness</b> – Identifies and keeps up to date on key national and international policies and economic, political, and social trends that affect the organization. Understands near-term and long-range plans and determines how best to be positioned to achieve a competitive business advantage in a global economy.</p>	<p><b>Strategic Thinking</b> – Formulates effective strategies consistent with the business and competitive strategy of the organization in a global economy. Examines policy issues and strategic planning with a long-term perspective. Determines objectives and sets priorities; anticipates potential threats or opportunities.</p>	<p><b>Mission Accomplishment</b> – Skilled in focusing on accomplishing work objectives in accordance with the strategic goals and objectives of an organization.</p>
<p><b>Partnering</b> – Develops networks and builds alliances, engages in cross-functional activities; collaborates across boundaries, and finds common ground with a widening range of stakeholders. Utilizes contacts to build and strengthen internal support bases.</p>	<p><b>Political Savvy</b> – Identifies the internal and external politics that impact the work of the organization. Approaches each problem situation with a clear perception of organizational and political reality; recognizes the impact of alternative courses of action.</p>	<p><b>Influencing/Negotiating</b> – Persuades others; builds consensus through give and take; gains cooperation from others to obtain information and accomplish goals; facilitates "win-win" situations.</p>
<p><b>Vision</b> – Takes a long-term view and acts as a catalyst for organizational change; builds a shared vision with others. Influences others to translate vision into action.</p>		

<b>Expert Level - Leadership Training</b>	
<b>Course Title</b>	<b>Vendor</b>
Coaching and Mentoring for Excellence	OPM
Engaging and Encouraging Employees	OPM
Federal Executive Institute/Leadership for a Democratic Society	OPM
Industrial College of the Armed Forces	NDU
Public Sector Leadership: Vision, Values and Vital Strategies	OPM
Strategic Communication Workshop	NPS
Navy Senior Leader Seminar	NPS
Power Thinking: The Strategies of Outstanding Leaders	OPM
Defense Senior Leader Development Program	CPMS

## Required and Recommended Certifications and Education

The ASN(RDA) serves as the responsible and accountable authority for DoN Acquisition Workforce (AWF) management, oversight, and stewardship and provides broad executive oversight of the DoN Defense Acquisition Workforce Improvement Act (DAWIA) Program, ensuring that it meets the overarching needs of the Navy/Marine Corps team.

According to the December 2011 [DAWIA Operating Guide](#), as a member of the Acquisition Workforce (AWF) – an employee assigned to an acquisition designated position – the employee is responsible for meeting the DAWIA requirements of the position and maintaining currency in the BUS-FM career field. The certification requirements are determined by the position category and certification level assigned to the acquisition position based on the Acquisition workforce member’s duties, responsibilities, and authorities.

Provided below is a general guide for required DAWIA certification levels according to the BUS-FM Competency Framework & Career Roadmap. Additionally, for enhanced professional development, the Certified Defense Financial Management (CDFM) and CDFM Acquisition (CDFM-A) are recommended certifications for all proficiency levels.

<b>Certifications</b>	<b>Entry</b>	<b>Journeyman</b>	<b>Advanced</b>	<b>Expert</b>
Required (DAWIA)	BUS-FM Level I	BUS-FM Level II	BUS-FM Level III	BUS-FM Level III
Recommended	CDFM	CDFM/ CDFM (A)	CDFM/ CDFM (A)	CDFM/ CDFM (A)
<b>Education</b>	<b>Entry</b>	<b>Journeyman</b>	<b>Advanced</b>	<b>Expert</b>
Recommended	Associate’s/ Bachelor’s	Bachelor’s/ Master’s	Bachelor’s/ Master’s	Bachelor’s/ Master’s/Doctorate

Provided in Appendix A is a list of DAWIA certification requirements for all levels, dated as of May 2012. For a current list of DAWIA certification requirements go to:

<http://icatalog.dau.mil/onlinecatalog/CareerLvl.aspx#>

To register for DAWIA classes use the “Register Now” website at:

<http://www.atrrs.army.mil/channels/registernow/>

For more information about CDFM and CDFM-A certifications visit

<http://www.asmconline.org/certification/cdfm-information/>

## Appendix A: DAWIA BUS-FM Certification

### Level 1 Certification

CERTIFICATION STANDARDS & CORE PLUS DEVELOPMENT GUIDE			
Type of Assignment	Representative Activities		
Budget/Program FM Analyst	<ul style="list-style-type: none"> <li>▶ Applies basic concepts of budget and program principles, policies, procedures, concepts, standards, terminology, and a general knowledge of the financial management and business operation systems</li> <li>▶ Possesses a basic knowledge of acquisition; recognizes the life-cycle process of an acquisition program</li> <li>▶ Review, allocate, or manage acquisition resources and programs</li> </ul>		
EVM Analyst	<ul style="list-style-type: none"> <li>▶ Relates earned value management to acquisition and financial management associated processes, identifies DoD and DFARS earned value contractual requirements, calculates simple EVM metrics from EVM data</li> </ul>		
Core Certification Standards (Required for DAWIA certification.)			
Acquisition Training	▶ <b>ACQ 101</b> Fundamentals of Systems Acquisition Management		
Functional Training	▶ <b>BCF 102</b> Fundamentals of Earned Value Management		
	▶ <b>BCF 103</b> Fundamentals of Business Financial Management		
Education	▶ <b>BCF 106</b> Fundamentals of Cost Analysis		
	▶ Formal education not required for certification		
Experience	▶ 2 years of acquisition experience in Budgeting, Financial and/or Earned Value Management		
Core Plus Development Guide (Desired training, education, and experience.)		Type of Assignment	
Training		Bgt/Prg FM Analyst	
		EVM Analyst	
<b>BCF 107</b> Applied Cost Analysis (R)		✓	✓
<b>CLB 014</b> Acquisition Reporting Concepts and Policy Requirements		✓	✓
<b>CLB 017</b> Performance Measurement Baseline		✓	✓
<b>CLB 018</b> Earned Value and Financial Management Reports		✓	✓
<b>CLB 019</b> Estimate at Completion		✓	✓
<b>CLB 020</b> Baseline Maintenance		✓	✓
<b>CLC 008</b> Indirect Costs		✓	✓
<b>CLC 024</b> Basic Math Tutorial		✓	✓
<b>CLC 102</b> Administration of Other Transactions		✓	✓
<b>CLM 016</b> Cost Estimating		✓	✓
<b>CLM 021</b> Introduction to Reducing Total Ownership Costs (R-TOC)		✓	✓
<b>CLM 032</b> Evolutionary Acquisition		✓	✓
Education			
▶ Associate in Applied Science (A.A.S.) or equivalent in business or a business-related field			
Experience			
▶ 2 years of acquisition experience in Budgeting, Financial and/or Earned Value Management in support of an acquisition program			
<b>Notes:</b>			
1 The Core Certification Standards section lists the training, education, and experience REQUIRED for certification at this level.			
2 "(R)" following a course title indicates the course is delivered as resident based instruction.			
3 When preparing your IDP, you and your supervisor should consider the training, education, and experience listed in this Core Plus Development Guide if not already completed.			

Resource: <https://dap.dau.mil/career/bcf/Pages/CertificationFM.aspx>

## Level II Certification

### CERTIFICATION STANDARDS & CORE PLUS DEVELOPMENT GUIDE

Type of Assignment	Representative Activities
<b>Budget/Program FM Analyst</b>	<ul style="list-style-type: none"> <li>▶ Applies general knowledge of budget and program principles, policies, procedures, concepts, standards, terminology, and financial management and business operation systems</li> <li>▶ Applies knowledge of acquisition life-cycle process and supports development and preparation of acquisition documents</li> <li>▶ Prepares and/or reviews acquisition and financial management documents</li> <li>▶ Review, allocate, or manage acquisition resources and programs</li> </ul>
<b>EVM Analyst</b>	<ul style="list-style-type: none"> <li>▶ Interprets program status and predicts trends by analyzing earned value cost and schedule data as an element of integrated program management</li> <li>▶ Applies EVM concepts as principal EVM member of an IBR review IPT</li> <li>▶ Interprets ANSI EVM standard as entry-level EVMS review team evaluator</li> <li>▶ Completes EVM requirements for acquisition solicitation packages</li> </ul>

### Core Certification Standards (Required for DAWIA certification.)

<b>Acquisition Training</b>	<ul style="list-style-type: none"> <li>▶ <b>ACQ 201A</b> Intermediate Systems Acquisition, Part A</li> <li>▶ <b>ACQ 201B</b> Intermediate Systems Acquisition, Part B (R)</li> </ul>
<b>Functional Training</b>	<ul style="list-style-type: none"> <li>▶ <b>BCF 106</b> Fundamentals of Cost Analysis</li> <li>▶ If not already completed (as required) at Level I, AND</li> <li>▶ <b>BCF 205</b> Contractor Business Strategies (R)</li> <li>▶ <b>BCF 220</b> Acquisition Business Management Concepts</li> <li>▶ <b>BCF 225</b> Acquisition Business Management Application (R)</li> <li>▶ <b>EVM 201</b> Intermediate Earned Value Management (R)</li> <li>▶ <b>CLM 017</b> Risk Management</li> <li>▶ <b>CLM 024</b> Contracting Overview</li> </ul>
<b>Education</b>	▶ Formal education not required for certification
<b>Experience</b>	▶ 4 years of acquisition experience in Budgeting, Financial and/or Earned Value Management

### Core Plus Development Guide (Desired training, education, and experience.)

Training	Type of Assignment	
	Bgt/Prg FM Analyst	EVM Analyst
<b>BCF 204</b> Intermediate Cost Analysis (R)	✓	
<b>BCF 206</b> Cost Risk Analysis (R)	✓	✓
<b>BCF 207</b> Economic Analysis (R)	✓	✓
<b>BCF 215</b> Operating and Support Cost Analysis (R)	✓	✓
<b>CLC 005</b> Simplified Acquisition Procedures	✓	✓
<b>CLC 007</b> Contract Source Selection	✓	✓
<b>CLC 011</b> Contracting for the Rest of Us	✓	
<b>CLC 030</b> Essentials of Interagency Acquisitions/Fair Opportunity	✓	✓
<b>CLC 106</b> Contracting Officer's Representative with a Mission Focus	✓	✓
<b>CLG 001</b> DoD Government Purchase Card	✓	
<b>CLM 012</b> Scheduling	✓	✓
<b>CLM 040</b> Proper Financial Accounting Treatments for Military Equipment	✓	
<b>EVM 262</b> EVMS Validation and Surveillance (R)		✓
<b>EVM 263</b> Principles of Schedule Management (R)	✓	✓
<b>Education</b>		
▶ Baccalaureate degree in business or a business-related field		
<b>Experience</b>		
▶ 4 years of acquisition experience in Budgeting, Financial and/or Earned Value Management in support of an acquisition program		

**Notes:**

- 1 The Core Certification Standards section lists the training, education, and experience REQUIRED for certification at this level.
- 2 "(R)" following a course title indicates the course is delivered as resident based instruction.
- 5 When preparing your IDP, you and your supervisor should consider the training, education, and experience listed in the Core Plus Development Guide at this and the lower level(s) if not already completed.

Resource: <https://dap.dau.mil/career/bcf/Pages/CertificationFM2.aspx>

### Level III Certification

#### CERTIFICATION STANDARDS & CORE PLUS DEVELOPMENT GUIDE

Type of Assignment	Representative Activities
<b>Budget/Program FM Analyst</b>	<ul style="list-style-type: none"> <li>▶ Manages development and evaluation of budget and program improvement plans and resolves complex issues, identifies options, and negotiates with internal and external stakeholders for implementation</li> <li>▶ Advises senior management on fiscal aspects of program management, ensures fiscal integrity, supports integration of acquisition disciplines</li> <li>▶ Manages all aspects of the business financial management process for defense acquisition programs</li> <li>▶ Review, allocate, or manage acquisition resources and programs</li> </ul>
<b>EVM Analyst</b>	<ul style="list-style-type: none"> <li>▶ Plans and manages the IBR process as program manager’s principal earned value advisor</li> <li>▶ Leads EVMS validation reviews as review director or principal deputy</li> <li>▶ Analyzes and applies EVM data to determine root causes of existing cost and schedule problems, to forecast potential cost and schedule problems, and to forecast final project costs</li> </ul>

#### Core Certification Standards (Required for DAWIA certification.)

<b>Acquisition Training</b>	▶ Acquisition Training identified at Level II must have been completed
<b>Functional Training</b>	<ul style="list-style-type: none"> <li>▶ Functional Training identified at Level II must have been completed</li> <li>▶ <b>BCF 301</b> Business, Cost Estimating, and Financial Management Workshop <b>(R)</b></li> <li>▶ <b>CLM 013</b> Work-Breakdown Structure</li> <li>▶ <b>CLM 031</b> Improved Statement of Work</li> </ul>
<b>Education</b>	▶ Formal education not required for certification
<b>Experience</b>	▶ 6 years of acquisition experience in Budgeting, Financial and/or Earned Value Management

Core Plus Development Guide (Desired training, education, and experience.)	Type of Assignment	
	Bgt/Prg FM Analyst	EVM Analyst
<b>Training</b>		
<b>ACQ 450</b> Leading in the Acquisition Environment <b>(R)</b>	✓	✓
<b>ACQ 451</b> Integrated Acquisition for Decision Makers <b>(R)</b>	✓	✓
<b>ACQ 452</b> Forging Stakeholder Relationships <b>(R)</b>	✓	✓
<b>CLL 015</b> Product Support Business Case Analysis (BCA)	✓	✓
<b>CLM 014</b> IPT Management and Leadership	✓	✓
<b>CLM 200</b> Item-Unique Identification	✓	
<b>CON 110</b> Mission-Support Planning	✓	
<b>CON 111</b> Mission Strategy Execution	✓	
<b>CON 112</b> Mission-Performance Assessment	✓	
<b>PMT 251</b> Program Management Tools Course, Part I	✓	✓
<b>PMT 257</b> Program Management Tools Course, Part II	✓	✓
<b>PMT 352A</b> Program Management Office Course, Part A	✓	✓
<b>PMT 352B</b> Program Management Office Course, Part B <b>(R)</b>	✓	✓
<b>Education</b>		
▶ Graduate degree in business, business related field		
<b>Experience</b>		
▶ 6 years of acquisition experience in Budgeting, Financial and/or Earned Value Management in support of an acquisition program		

**Notes:**

- 1 The Core Certification Standards section lists the training, education, and experience REQUIRED for certification at this level.
- 2 "(R)" following a course title indicates the course is delivered as resident based instruction.
- 5 When preparing your IDP, you and your supervisor should consider the training, education, and experience listed in the Core Plus Development Guide at this and the lower level(s) if not already completed.

Resource: <https://dap.dau.mil/career/bcf/Pages/CertificationFM3.aspx>