



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

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

## **Earned Value Management Competency Model & Career Path Guide**

*July 2012*

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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 the 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. The DoN Center for Earned Value Management (CEVM) was designated as the lead for the Earned Value workforce under the leadership of the Business Financial Management Competency Lead. The CEVM led the effort with strong support from members of NAVAIR, SPAWAR, NAVSEA, Marcor, NELO, and SSP. All participants were actively involved with developing portions of the final framework. The team also included an advisor from ASN, RD&A DACM.

## Purpose

The Earned Value Management Competency Model is a reference document for EVM Practitioners 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 the 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 EVM Community than could be captured in a single reference source.

**Most EVM Practitioners are likely members of the Acquisition BUS-FM Community, but the practitioner may belong to one of several Acquisition Communities including Program Management, Systems Engineering, or BUS-CE. This model is primarily focused on the BUS-FM Community, but can be tailored to other communities primarily by adjusting DAWIA certification requirements. However, the EVM-specific courses from the BUS-FM certification requirements are still highly recommended.**

*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 EVM career path.

The framework and guide are a work in progress and will continue to evolve as the DoN Earned Value Management community further defines its professional development processes and opportunities.

## **DoN EVM Competency Model Framework**

The DoN EVM Competency model is further defined by the following dimensions:

- Proficiency Levels
  - Entry/Apprentice
  - Mid/Journey
  - Senior/Expert
- Skills, Experience and Education
  - Technical Skills
  - Experience
  - Certifications
  - Education and Training
  - Leadership Skills
  - Business Acumen Skills

### **Proficiency Levels**

Proficiency levels do not specifically relate to a grade or pay band associated with a personnel system (due to various systems used across DON and SYSCOMs). SYSCOMs/Agencies should provide employees with a crosswalk relating the personnel system and structure used by the command to the proficiency levels below. An individual DOES NOT have to complete every item within a proficiency level to be considered for a job at the next level. Supervisors should provide guidance to employees on which competencies are needed for highly competitive or positions of interest at a higher proficiency level within the command. Completion of every item within a proficiency level DOES NOT guarantee the employee a new position. Promotions or reassignments to new positions are based on overall attributes as well as job proficiency.

### **Entry/Apprentice Proficiency Level**

New or junior employees; usually receiving their first exposure to the EVM Analyst skill set requirements.

- Recognition, knowledge and skills needed to perform as a junior EVM Analyst/project team member.
- Ability to perform low-risk and relatively simple EVM tasks or to perform more complex tasks under direct supervision of a Mid or Senior level EVM Analyst.
- Overall understanding of EVM/S fundamentals.

- Recognition of Service/Agency EVM requirements development processes.
- Ability to define and construct various EVM documents, under supervision.
- Understanding of and involvement in the definition, initiation, conceptualization or design of EVM project requirements.

Experience for Entry/Apprentice Level:

- At least one year of EVM or closely related experience within the last five years is required to be hired at Entry/Apprentice level.
- Experience may include but not be limited to constructing a work breakdown structure; preparing project analysis documents; tailoring acquisition documents to ensure that quality, effective, efficient systems or products are delivered; analyzing and/or developing requirements; monitoring performance efficiency; assisting with quality assurance; risk management, and budget development.
- Three years at entry/apprentice level is typically required for consideration/reassignment to position at higher level.

**Mid/Journey Proficiency Level**

Individuals that have a solid working level-knowledge of the EVM Analyst skill set and independently perform the day-to-day work expected of their profession.

- Knowledge and skills to manage projects or program segments of low to moderate risks with little or no supervision.
- Ability to independently apply EVM processes, including establishing contractor reporting requirements, conducting EVM analysis and formulating recommended courses of action, presenting recommendations and conclusion to leadership, and adhering the the organizations policies, regulations and guidance.
- Ability to identify and track actions to initiate an acquisition program or project using cost/benefit analysis.
- Ability to understand and apply the process to prepare information for a baseline review and ability to assist in development of Total Ownership Cost (TOC) estimates.
- Ability to manage projects as well as program segments and distinguish between program and project work.

Experience for Mid/Journey Level:

- At least three years of experience within the last five years that includes experience at the entry/apprentice level or equivalent experience is typically required for assignment at Mid/Journey level.
- Five years at mid/journey level (8 years total) is typically required for consideration/reassignment to Senior/Expert level position.

**Senior/Expert Proficiency Level**

An employee that has mastered multiple skills, works independently, and is usually in a leadership role (not necessarily a supervisory role).

- Knowledge and skills to manage moderate to high-risk programs or projects that require significant EVM service/agency knowledge and experience.
- Ability to manage and evaluate EVM related program activities and create an environment for program success.

- Ability to manage the EVM requirements development, implementation, and execution processes, overseeing entry and mid-level team members.
- Expert ability to lead, manage, evaluate, integrate, negotiate and influence earned value management activities as they relate to acquisition programs.

Experience for Senior/Expert Level:

- At least eight years of experience within the last five years that includes experience at the entry and mid-levels or equivalent experience is typically required for assignment at Senior/Expert level.
- Seven years at Senior/Expert level (15 years total) is typically required for consideration/reassignment to higher level position (i.e. an S.E.S position).

## Competency Categories

For modeling purposes, a competency is defined as “A combination of knowledge, skills and abilities in a particular discipline which, when acquired, allows a person to perform task or function at a specific defined level of proficiency”. The following competencies are described in detail for each proficiency level throughout the competency model:

- **Technical Skills** - outlines the types of functional knowledge, skills, and abilities that an individual should exhibit for his or her job.
- **Experience** – describes experience, tasks and responsibilities that an employee should perform as he or she increases capability within a competency.
- **Certifications** – Educational certifications that enhance an employee's overall personal and professional development.
- **Education and Training** – Formal and informal educational degrees and training that enhance an employee's overall personal and professional development.
- **Leadership Skills** – outlines individual and organizational competencies that are important for the effective performance of employees, supervisors, managers, and executives.
- **Business Acumen Skills** – describes general behaviors (communication, problem solving, etc.) that enhance an employee’s ability to perform in the workplace

### Technical Skills

- The Technical Skills build across the three proficiency levels as an employee progresses through their career.
- An ENTRY level technical skill is assumed to be possessed by someone at the JOURNEY Level for the same competency.
- A JOURNEY level technical skill is assumed to be possessed by someone at the SENIOR Level for the same competency.
- Each technical skill relates to a particular discipline in the EVM competency universe, such as Applying Earned Value on Government Contracts.
- Each discipline includes a range of defined lower level competencies with descriptions of the level of proficiency required for each proficiency level.

### Experience

- Experience reflects the number of years an employee will typically need to become fully competent at a given level.
- Timeframes shown for years of experience are guidelines and not absolutes. Occasionally, employees who possess above average skills and abilities may progress more rapidly.

- Rotational EVM assignments can be within a local command or at another command and should provide a career broadening opportunity for the employee.
- Lists the Required, Recommended, and Suggested experience at each proficiency level.
- An item listed as Required is expected to become, or to already be a part of a skill set for every person at a particular level.
- The knowledge or ability the Required experience provides is considered critical to every employee before they can be considered competitive for the next proficiency level.
- An item listed as Recommended is optional but considered to be very valuable and would add measurably to the employee skill set.
- An item listed as Suggested is optional and is provided as a general experience that would further enhance an employee's competencies.

### **Certifications**

- Reflects the opportunity for an employee to demonstrate professional qualifications.
- The foremost professional credentials are listed in the model.

### **Education and Training**

- Lists the Required, Recommended, and Suggested formal and informal education and training at each proficiency level.
- An item listed as Required is expected to become, or to already be a part of a skill set for every person at a particular level.
- The knowledge or ability the Required education/training provides is considered critical to every employee before they can be considered competitive for the next proficiency level.
- An item listed as Recommended is optional but considered to be very valuable and would add measurably to the employee skill set.
- An item listed as Suggested is optional and is provided as other general topics or courses for other training that would further enhance an employee's competencies.

### **Leadership Skills**

- Leadership Skills are generally the same across the three proficiency levels.
- These skills are predominantly derived from Office of Civilian Human Resources documentation.

### **Business Acumen Skills**

- Business Acumen Skills are generally the same across the three proficiency levels.
- These skills are predominantly derived from Office of Civilian Human Resources documentation.

## DON Earned Value Management (EVM) Competency Model

### 1. Enterprise Perspectives

This section describes foundational knowledge such as situational awareness of the Integrated Defense Acquisition, Technology, and Logistics Life Cycle Management System processes and disciplines.

	Entry/Apprentice Level	Mid/Journey Level	Senior/Expert Level
<b>1.1 DoD Foundational Knowledge</b>	Understanding of the basic fundamentals of the DOD System Acquisition and Life Cycle Management process. Awareness of the basic aspects of the Planning, Programming, Budgeting and Execution System (PPBES) process for development of the DOD and program budgets. Awareness of governing policy and documents for DOD systems acquisitions.	Understanding and experience as a program team member in the DOD System Acquisition and Life Cycle Management process. As an acquisition program team member understand the PPBES process and support development of program inputs to the process. Identify and understand governing policy documents for DOD systems acquisitions.	Experience as a senior program team member providing inputs to execution of the DOD System Acquisition and Life Cycle Management process. As senior team member support development of alternative and inputs to the PPBES process for program execution. Interpret and provide feedback/recommendations on governing policy documents for DOD systems acquisitions.
1.1.1 Integrated Defense Acquisition, Technology, and Logistics Life Cycle Management System Disciplines	Obtains DAWIA BUS-FM Core Level 1 Certification	<ul style="list-style-type: none"> <li>• Obtains DAWIA BUS-FM Core Level 2 Certification</li> <li>• Obtains DAWIA BUS-FM Core Level 3 Certification</li> </ul>	
<b>1.2 DoN EVM Practitioner Behaviors</b>	Develops understanding of different program/project EVM contexts/environments and EVM application/implementation options and approaches; and builds stakeholder/organizational relationships.	Understands, is conversant with, and applies comprehensive viewpoints and tailored EVM approaches; collaborates with stakeholders on programs/projects with occasional help from Senior/Expert level staff.	Demonstrates expert knowledge of and consistent excellence in applying comprehensive viewpoints and tailored EVM approaches; collaborates with stakeholders on projects across multiple programs and/or enterprise organizations.

<p><b>1.2.1. Comprehensive Viewpoints</b></p>	<ul style="list-style-type: none"> <li>• Begins to develop an EVM business/mission perspective on specific projects/programs, problems or opportunities</li> <li>• Gathers, assimilates, and evaluates information to understand the customer's mission, business domains, stakeholder requirements, acquisition strategies, government acquisition conditions, etc.</li> <li>• Gathers, assimilates, and evaluates information to understand project/program perspectives that go beyond EVM to encompass, organizational, political, managerial, economic and social perspectives</li> <li>• Gathers, assimilates, and evaluates information about a broad range of issues that may impact EVM application/implementation in the project/program environment (i.e., regulations, policies, guidelines)</li> </ul>	<ul style="list-style-type: none"> <li>• Applies an EVM business/mission perspective that extends beyond the objectives of a specific project or program</li> <li>• Demonstrates a broad understanding of different EVM contexts and Environments</li> <li>• Demonstrates a broad understanding of customer missions, business domains, stakeholder requirements, acquisition strategies, government acquisition conditions, etc.</li> <li>• Considers EVM from multiple perspectives (i.e., organizational, political, managerial, economic and social dimensions)</li> <li>• Identifies and anticipates a broad range of issues that may impact EVM application/implementation across the program/project or enterprise (i.e., regulations, policies, guidelines)</li> </ul>	<ul style="list-style-type: none"> <li>• Advocates a long-term EVM business/mission perspective with senior level customers and stakeholders that extends beyond objectives of a specific program, SYSCOM, or Agency</li> <li>• Anticipates future EVM needs based on a broad understanding of the customer missions, business domains, stakeholder requirements, acquisition strategies, government acquisition conditions, etc.</li> <li>• Presents EVM perspectives to the customer that encompass, organizational, political, managerial, economic and social perspectives and recommends strategies, approaches, solutions</li> <li>• Communicates with the sponsor/customer/stakeholder about anticipated changes that may impact EVM application and implementation across the enterprise (i.e., regulations, policies, guidelines) and recommends strategies, approaches, solutions.</li> </ul>
<p><b>1.2.2 Tailored Approaches</b></p>	<ul style="list-style-type: none"> <li>• Collects and evaluates information and data in order to help define and scope potential EVM opportunities or problems</li> <li>• Brainstorms multiple approaches and solutions with program/project customers and mid/senior level EVM Practitioners</li> <li>• Formulates tailored EVM application/implementation solutions with mid/senior level EVM Practitioners assistance</li> </ul>	<ul style="list-style-type: none"> <li>• Frames the essence of customer EVM opportunities and problems, and develops tailored solutions</li> <li>• Defines, simplifies, and scopes EVM opportunities and problems at all levels (i.e., project, program, enterprise)</li> <li>• Seeks and/or uses specialized skills on EVM opportunities and problems</li> <li>• Clarifies and communicates EVM opportunities and problems by recognizing patterns, using analogies, drawing parallels</li> <li>• Formulates, feasible and implementable EVM solutions that make viable tradeoffs amongst political, organizational, economic and other dimensions and align interests of the customer's organization with those of the larger stakeholder community</li> </ul>	<ul style="list-style-type: none"> <li>• Frames the essence of EVM opportunities and problems, and develops tailored solutions</li> <li>• Defines, simplifies, and scopes EVM opportunities and problems at all levels (i.e., project, program, enterprise)</li> <li>• Seeks and/or uses specialized skills on EVM opportunities and problems</li> <li>• Clarifies and communicates EVM opportunities and problems by recognizing patterns, using analogies, drawing parallels, and applying critical thinking</li> <li>• Shares a wide variety of past experiences and proven approaches that can be applied to current problems</li> <li>• Recommends/selects tailored solutions that that address the political, organizational, economic and other dimensions of the program and align interests of the customer's organization with those of the larger stakeholder community</li> </ul>
<p><b>1.2.3 Stakeholder Relationships</b></p>	<ul style="list-style-type: none"> <li>• Networks with EVM competency organization staff to build relationships and learn competency activities and processes</li> <li>• Works with project IPTs to understand project/program contexts and environments, variety of EVM contexts, environments, opportunities and problems</li> <li>• Begins to develop independent, balanced viewpoints that reflect understanding of stakeholder needs, expectations, and resources</li> <li>• Learns how to communicate EVM problems and solutions in ways that are easily understood (e.g., using examples, analogies, etc.)</li> <li>• Becomes comfortable with questioning assumptions,</li> </ul>	<ul style="list-style-type: none"> <li>• Cultivates and fosters an active network across regulatory groups, sponsors/customers, DCMA, CEVM, DoD AT&amp;L, ASN FM&amp;B, and other key stakeholders for information sharing, collaboration, and decision making</li> <li>• Finds best available EVM expertise/resources from inside and outside the competency</li> <li>• Communicates independent, balanced viewpoints and recommendations to key decision makers that reflect an understanding of stakeholder needs, expectations, and resources</li> <li>• Explains complex EVM problems and solutions by representing them in simple terms (e.g., using examples, analogies, etc.)</li> <li>• Questions assumptions, processes, requests that are</li> </ul>	<ul style="list-style-type: none"> <li>• Forms and leverages alliances across key stakeholder communities for information sharing, collaboration, and decision-making</li> <li>• Leverages diverse resources from inside and outside the SYSCOM/Agency competency to meet future sponsor/customer needs for EVM expertise.</li> <li>• Gains support for independent, balanced viewpoints and recommendations from key decision-makers that reflect an understanding of stakeholder needs, expectations, resources, etc.,</li> <li>• Communicates recommendations to decision makers by clearly, effectively, and confidently articulating complex ideas, problems, and solutions in understandable terms</li> </ul>

	<p>processes, and requests that are inconsistent with stakeholder expectations, objectives, etc.,</p>	<p>inconsistent with stakeholder expectations, objectives, etc.,</p> <ul style="list-style-type: none"><li>• Speaks honestly, directly, and diplomatically to the sponsor/customer and other stakeholders, factoring in interpersonal, agency, and other politics</li><li>• Builds a common framework of ideas and objectives as the basis for making decisions among multiple stakeholders</li><li>• Identifies opportunities for productive resolution of conflict as it arises; uses a variety of direct and indirect consensus-building techniques to reach agreement on ideas, recommendations and approaches</li><li>• Develops an understanding of Executive Reporting requirements (SAR, DAES, Dashboard, etc.) and Program Reporting requirements (CSDR, DCARC, etc.)</li></ul>	<ul style="list-style-type: none"><li>• Raises difficult issues and recommendations with key decision-makers, including information on sensitive or politically charged issues, to increase the likelihood of achieving their mission objectives.</li><li>• Speaks honestly, directly, and diplomatically to the sponsor/customer and other stakeholders, factoring in interpersonal, agency, and inter-agency politics</li><li>• Builds consensus among multiple stakeholders by using a common framework of ideas and objectives</li><li>• Resolves sensitive and politically charged issues tactfully; uses a variety of direct and indirect consensus-building techniques to overcome resistance and reach agreement on ideas, recommendations, and solutions</li></ul>
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## 2. Technical Skills

	Entry/Apprentice Level	Mid/Journey Level	Senior/Expert Level
<b>2.1 EVM Fundamentals</b>	<ul style="list-style-type: none"> <li>Develops a fundamental awareness and understanding of Earned Value, Earned Value Management, Earned Value Management Systems, and Earned Value Management Regulations, Policies, and Guidelines; performs routine activities associated with this competency under supervision of a Mid/Journey or Senior/Expert Level EVM Practitioner as a member of a program/project team.</li> </ul>	<ul style="list-style-type: none"> <li>Applies EV, EVM, EVMS fundamentals and EVM Regulations, Policies, and Guidelines as a member of program/project teams; performs and/or leads EVM Practitioner activities associated with this competency area; integrates EVM tools, techniques, and best practices at the program/project level with minimal Senior/Expert level assistance.</li> </ul>	<ul style="list-style-type: none"> <li>Advocates, leads, directs, and oversees EVM Practitioner activities in this competency area at the program/project level, as well as at the Service, Agency, or Center level. Demonstrates superior competencies in all EVM Practitioner activities in this area and contributes to internal and external Service, Agency, or Center goals.</li> </ul>
<b>2.1.1 Earned Value Management Regulations, Policies, Guidelines</b>	<ul style="list-style-type: none"> <li>Gains basic understanding of EVM regulations, policies, and guidelines</li> <li>Performs routine activities associated with this competency under supervision of Mid or Senior Level Practitioner</li> <li>Assists in the development of training materials in this competency area with mid/journey or senior/expert level oversight</li> </ul>	<ul style="list-style-type: none"> <li>Utilizes/applies EVM regulations, policy, and guidelines in support of program/project engagements</li> <li>Performs a broad range of activities associated with this competency with minimal Senior Practitioner oversight</li> <li>Develops training materials and conducts training in this competency area with senior/expert level oversight</li> </ul>	<ul style="list-style-type: none"> <li>Advises leadership on changes to policy and guidance needed to address emerging issue areas that affect the implementation of EVM.</li> <li>Interprets EVM regulations, policy and guidance for use in atypical situations, such as the use of EVM with FFP contracts or the need for a deviation from EVM requirements</li> </ul>
<b>2.1.2 Earned Value Management</b>	<ul style="list-style-type: none"> <li>Builds understanding of and can discuss basic EVM concepts and principles, terminology, management needs, benefits, and best practices. Performs routine activities associated with this competency under supervision of Mid or Senior Level Practitioner.</li> </ul>	<ul style="list-style-type: none"> <li>Understands and is fully conversant with EV concepts and principles, EVM terminology, analysis objectives, management needs, and benefits</li> <li>Applies and integrates EVM tools, techniques and best practices on activities associated with this competency as a member of program/project teams with only occasional help from Senior/Expert practitioners.</li> </ul>	<ul style="list-style-type: none"> <li>Consistently demonstrates highest levels of expertise in communicating and applying EV, EVM, EVMS concepts, terminology, regulations, policies, etc., across multiple program/projects, or enterprise organizations</li> </ul>
<b>2.1.3 Earned Value Management Systems</b>	<ul style="list-style-type: none"> <li>Gains an understanding of applicable policy, references, standards, resources, and training on the basic principles pertaining to an Earned Value Management System with help from Mid/Senior/ level staff.</li> <li>Utilizes available references, resources, training materials, OTJ experiences, and mentoring relationships to gain understanding principles of an EVMS including implementing and operating the ANSI 748 standard, EVM system design, and EVM system documentation</li> </ul>	<ul style="list-style-type: none"> <li>Utilizes available policy, references, standards, processes, resources, and training materials to gain expertise of contractor Earned Value Management System with help from peers and Senior Level staff.</li> <li>Identifies and explains the intent of the 32 ANSI 748 EVMS standard guidelines to stakeholders in easy to understand terms</li> <li>Provides examples of contractor EVMS Description documents, typical EVMS tools, and EVMS processes, roles and responsibilities</li> </ul>	<ul style="list-style-type: none"> <li>Demonstrates expert understanding of contractor EVMS. Develops policy, processes, and training materials and conducts information and education sessions on the EVM policy, guidance and processes for evaluating and implementing an EVMS. Provide advice and assistance on interpreting and implementing the DoD EVM policy and guidance.</li> <li>Facilitates interactions among EVMS implementers/owners, customers, end-users, reviewers, and other stakeholders to clarify issues or expectations, highlight potential or realized problems, and recommend practical, cost effective EVMS solutions.</li> </ul>

<p><b>2.2 Applying Earned Value</b></p>	<p>Develops an awareness and understanding of component relationships, their roles and responsibilities in the EVM implementation process, and the pre and post contract award activities involved with applying EVM; Performs associated fundamental and routine EVM activities in this competency area while supporting a Mid/Journey or Senior/Expert Level EVM Practitioner as a member of a program/project team.</p>	<p>Coordinates, performs and/or leads pre and post contract award EVM application activities as a member of program/project teams; integrates EVM tools, techniques, and best practices at the program/project level with minimal Senior/Expert level assistance.</p>	<p>Advocates, leads, directs, and oversees EVM application activities at the program/project level, as well as at the Service, Agency, or Center level. Demonstrates superior competencies in EVM Practitioner activities in this area and contributes to internal and external Service, Agency, or Center goals.</p>
<p><b>2.2.1 Roles and Responsibilities</b></p>	<ul style="list-style-type: none"> <li>• Gains an understanding of the roles &amp; responsibilities of the various DoD stakeholders (i.e., DoD Acquisition, Technology and Logistics (OUSD/AT&amp;L, DoD Executive Agent (DCMA), Component EVM Focal Points, Procuring Activity, Contract Management Office, DCAA, and PARCA) involved in assisting the program team in tailoring and implementing effective EVM on a program with help from Mid/Senior Level Staff. Abide by applicable OSD Memoranda that delineates the specific roles and responsibilities for all organizations with an EVM function</li> <li>• Develops basic awareness and knowledge of Integrated Program Management related project formulation activities</li> <li>• Assists with development of Integrated Program Management plans for simple, relatively routine, small to moderate-sized projects.</li> </ul>	<ul style="list-style-type: none"> <li>• Works collaboratively to improve the implementation of EVM by looking for ways to improve communications, share relevant information, and jointly participate in IBRs, contractor surveillance, and other EVM implementation activities</li> <li>• Identifies EVM-related DOD components and has basic situational awareness and understanding of their chain of command, organization, acquisition/business missions, operations, etc.</li> <li>• Reviews program acquisition strategy, planning and management documents to develop an understanding of program risks and their associated impact on IPM requirements, strategies and approaches</li> </ul>	<ul style="list-style-type: none"> <li>• Establishes working relationships with the different DoD components to assist the program team in implementing effective EVM on the program.</li> <li>• Collaborates with leadership in component organizations to build consensus and influence decisions regarding development of EVM policy and guidelines, EVMS validation and surveillance roles and responsibilities, etc.</li> </ul>
<p><b>2.2.2 EVM Requirements Planning and Contracting</b></p>	<ul style="list-style-type: none"> <li>• Provides information to help develop an approach for implementing EVM on contracts</li> <li>• Becomes knowledgeable in the program's planning and management documents, Acquisition policy and regulatory requirements with respect to Earned Value Management as well as EVM standards and guidance.</li> <li>• Develops an understanding of the program and associated risk, allowing greater insight to tailor EV requirements</li> <li>• Develops basic awareness and knowledge of Integrated Program Management related project formulation activities</li> <li>• Reviews program acquisition documents and provides inputs to mid and senior level EVM Practitioners</li> </ul>	<ul style="list-style-type: none"> <li>• Collaborates with the customer and develops an approach to implementing EVM for the acquisition organization.</li> <li>• Utilizes program planning and management documents, acquisition policy and regulatory requirements with respect to Earned Value Management, as well as EVM standards and guidance to lead the development of the EVM implementation strategy for the Program/project/organization.</li> <li>• Works with customer and functional experts to tailor the EVM requirements appropriate to the risk of the project/program.</li> <li>• Participates proactively in Integrated Program Management related project formulation activities</li> <li>• Uses program acquisition strategy, planning and management documents to develop IPM strategies consistent with program risk</li> </ul>	<ul style="list-style-type: none"> <li>• Influences the Government's approach for implementing EVM for the acquisition organization.</li> <li>• Proposes, communicates and recommends improvements for Acquisition policy and regulation, guidance and standards with respect to Earned Value Management.</li> <li>• Works with Program/project teams to develop the most appropriate EVM implementation strategy, tailored appropriately for risk.</li> <li>• Proposes alternatives, makes recommendations, and influences acquisition organization decisions regarding the selected approaches for obtaining and implementing Integrated Program Management</li> <li>• Understands the appropriateness, advantages, and limitations of using EVM in a Fixed Price environment</li> </ul>
<p><b>2.2.3 Post Contract Award Activities</b></p>	<p>Develops an awareness and understanding of EVM activities during contract execution such as Integrated Baseline Reviews and agency analysis procedures; conducting basic analysis activities and supporting</p>	<p>Leads many EVM activities during contract execution; organizes Integrated Baseline Review activities; independently develops performance analysis and presents findings to organizational and program office</p>	<p>Advocates, leads, directs, and oversees EVM execution activities at the program/project level, as well as at the Service, Agency, or Center level. Demonstrates superior competencies in EVM</p>

	<p><b>team leads in preparing monthly analysis; and understanding requirements for contractor baseline maintenance under Mid/Journey or Senior/Expert level EVM Practitioner guidance.</b></p>	<p><b>leadership; and reviews and assesses contractor baseline maintenance activities with minimal Senior/Expert level assistance.</b></p>	<p><b>Practitioner activities in this area and contributes to internal and external Service, Agency, or Center goals.</b></p>
<p><b>2.2.3.1 Integrated Baseline Review</b></p>	<ul style="list-style-type: none"> <li>• Develops an awareness and understanding of EVM Practitioner roles in the IBR planning, execution and close out processes</li> <li>• Performs associated fundamental and routine EVM activities in this competency area while supporting a Mid/Journey or Senior/Expert Level EVM Practitioner as a member of a program/project team.</li> </ul>	<ul style="list-style-type: none"> <li>• Performs and/or leads EVM Practitioner activities associated with IBR planning/preparation, execution and close out processes</li> <li>• Integrates IBR tools, techniques, and best practices at the program/project level with minimal Senior/Expert level assistance.</li> <li>• Ensures IBR is executed in accordance with organizational policies and procedures</li> <li>• Recognizes appropriateness of EVM methodologies employed by the contractor</li> <li>• Identifies risks associated with the contractor's implementation of the PMB</li> <li>• Translates IBR findings into contract/program risks and helps determine potential impacts as appropriate</li> </ul>	<ul style="list-style-type: none"> <li>• Leads, directs, oversees, and advocates EVM Practitioner IBR related activities at the program/project level.</li> <li>• Demonstrates superior competencies in all EVM Practitioner activities in this area and contributes to internal and external organizational goals.</li> </ul>
<p><b>2.2.3.2 Integrated Performance Analysis and Assessment</b></p>	<ul style="list-style-type: none"> <li>• Monitors contractor's performance.</li> <li>• Assists with tracking contractor performance to measure and assess the likelihood of meeting program and contractual requirements (cost, schedule, and technical viability).</li> <li>• Identifies deviations from program and control requirements.</li> <li>• Monitors contractor's performance.</li> <li>• Assists with tracking contractor performance to measure and assess the likelihood of meeting program and contractual requirements (cost, schedule, and technical viability).</li> <li>• Identifies deviations from program and control requirements.</li> </ul>	<ul style="list-style-type: none"> <li>• Tracks contractor performance to measure and assess the likelihood of meeting program and contractual requirements (cost, schedule, and technical viability).</li> <li>• Recommends resources to complete the program on time and within budget based on an analysis of metrics and deviations from program and contract requirements</li> <li>• Analyzes and applies EVM data to determine root causes of existing cost and schedule problems</li> <li>• Evaluates program affordability by analyzing/integrating EVM and IMS performance indicators, cost estimates, and risk/risk mitigation metrics, CEVM Analysis Toolkit</li> <li>• Conduct Standard Analysis Check</li> <li>• Conduct Preliminary Assessment (ensures the data on the submitted CPR/IMS is clear, complete, consistent, and credible. Checking data accuracy, consistency, and validity):             <ul style="list-style-type: none"> <li>- Conduct Contract Performance Report (CPR) Validation Checklist</li> <li>- Conduct Contract Funds Status Report (CFSR) Reconciliation Checklist (ensuring the numbers reported in the CFSR flow to the CPR Format 3 (baseline)</li> <li>- Conduct Integrated Master Schedule (IMS) Analysis</li> <li>- Collect DCMA/SUPSHIP Surveillance input</li> <li>- Identify any EVMS issues impacting data used for analysis</li> <li>- Work with technical team to assess the adequacy and quantify of resources to meet program objectives</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Recommends adjustments to the sponsor/customer concerning the contractor's approaches and performance to address and close identified issues from assessments</li> <li>• Recommends schedule, funding, scope, and work statement changes, based upon contractor performance.</li> <li>• Facilitates PM tradeoff decisions based on Integrated Program Management data, analyses and reports</li> <li>• Develops and imposes Enterprise and/or Service Agency level Integrated Program Analysis guidance to ensure standardization and consistency in data accumulation and the approach to executing analysis , within the division as well as the effectiveness of the message to management</li> <li>• Assure that users can obtain access to data and other types of technical analyses to provide the optimum capability for decision-making</li> <li>• Work closely with the cognizant EVM organization leadership and Subject Matter Experts</li> <li>• Recommends adjustments to the customer concerning the contractor's approaches and performance to address and close identified issues from assessments</li> <li>• Recommends schedule changes based upon program/project events or contractor performance.</li> </ul>

<p>2.2.3.2.1 EV Analysis (CPR)</p>	<ul style="list-style-type: none"> <li>• Understands how to analyze the CPR for completeness and data consistency</li> <li>• Uses EVM Best Practices, provide input to EVM analysis for the program office</li> <li>• Understands the relationship between the CPR Formats</li> <li>• Understands how BCWP is assessed and the significance of different assessment methodologies</li> <li>• Understands how to validate CPR values by using available toolsets</li> <li>• Understands MR and UB, and the rules governing use of each</li> <li>• Understands contract documents which drive reporting requirements (CDRL, etc.)</li> <li>• Awareness of Risk and why it is significant in CPR analysis</li> <li>• Understands how CPI and SPI are used in Management Decisions</li> <li>• Understands the Variance Analysis Report (VAR) Process</li> <li>• Understands how EVM can provide Predictive Performance Data</li> <li>• Understands how TCPI and IEAC are calculated and used to validate EAC</li> <li>• Attends cost/schedule analysis presentations and meetings with customer/Program Management when appropriate</li> <li>• Understands the relationship between the CPR analysis and the IMS analysis</li> <li>• Performs routine CPR analysis using guidelines and best practices specified by the procuring command's EVM organization</li> <li>• Understands the Variance Analysis Process and related GOVT and Industry VAR management responsibilities</li> <li>• Begins to develop a working knowledge of using EVM analysis tools, such as wnsight</li> </ul>	<ul style="list-style-type: none"> <li>• Attends Program Management Reviews and Risk Reviews</li> <li>• Identifies cost and schedule drivers</li> <li>• Assesses LOE and EV methods and their impacts on performance metrics</li> <li>• Assess PMB changes and potential impacts</li> <li>• Analyzes staffing changes and conveys impacts to the program team</li> <li>• Analyze MR and UB usage for consistency and appropriate uses</li> <li>• Provide input to contractual documents regarding EVM application and reporting requirements (CDRL, etc.)</li> <li>• Using CPI and SPI trends project potential future overruns and identify cost drivers</li> <li>• Analyze Variance Analysis Reports (VARs) to determine reasonableness of cause/impact/corrective action statements</li> <li>• Utilizing TCPI and IEAC analyze EACs to the lowest level practicable to determine VAC drivers and EAC reasonableness</li> <li>• Coordinate with the schedule analyst in order to validate/cross-check CPR analysis results with the IMS analysis results</li> <li>• Coordinate with the schedule analyst in order to validate/cross-check CPR analysis impact on the EAC</li> <li>• Able to brief CPR analysis results to internal management</li> <li>• Participate in briefing CPR analysis results to the customer/Program Management</li> <li>• Participate in developing the contract EAC</li> <li>• Provide the customer with a detailed CPR analysis providing sufficient information which can be utilized to support program decisions and risk assessment/mitigation activities. The analysis should provide insight to the suppliers cost drivers, trends, EAC validity, MR/UB usage, staffing projections, etc. As much as practicable, the analysis should be tailored to meet the needs of the customer based on program/contract status, contract types, program cost position, etc.</li> </ul>	<ul style="list-style-type: none"> <li>• Provide CPR analysis training/awareness to other groups (technical team, Program Managers, etc.)</li> <li>• Applies innovative analysis techniques</li> <li>• Develops new methodologies for assessing performance and communicating analysis</li> <li>• Presents performance and analysis information at appropriate levels of detail for varying levels of management.</li> </ul>
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<p><b>2.2.3.2.3 Schedule Analysis (IMS)</b></p>	<ul style="list-style-type: none"> <li>• Understand the basic development and maintenance of an IMS</li> <li>• Understand the critical metrics used for schedule analysis and their significance</li> <li>• Understand what Critical Path means and its significance</li> <li>• Understand what Driving Path means and its significance</li> <li>• Awareness of Risk and why it is significant in IMS analysis</li> <li>• Understand what a Schedule Risk Analysis (SRA) is, why it is performed, and when it is performed</li> <li>• Develop a basic understanding of the DCMA 14 Point Schedule Assessment</li> <li>• Develop a basic understanding of contractual documents related to the IMS</li> <li>• Understand the relationship between the IMS analysis and the CPR analysis</li> <li>• Understand the relationship between the IMS and the EAC</li> <li>• Gains basic knowledge and understanding of how to conduct schedule analysis</li> <li>• Builds understanding of and ability to discuss schedule analysis concepts, guidelines and best practices as defined in the following key documents: the NDIA PASEG; the DOD IMP/IMS Preparation and Use Guide; the ANSI/EIA-748 Guidelines; the EVMS Implementation Guide (EVMIG); the IMS-DID-81650; and the DON CEVM Analysis tool kit</li> <li>• Builds understanding of /develops ability to discuss the ANSI 748 schedule guidelines and DID IMS requirements and the discipline/requirements they impose on industry</li> </ul>	<ul style="list-style-type: none"> <li>• Analyze the IMS for evidence of proper application of development and maintenance techniques</li> <li>• Be able to provide input to IMS related contract documents</li> <li>• Assess schedule status by applying basic and advanced schedule analysis techniques.</li> <li>• Participate in a schedule analysis utilizing the DCMA 14 Point Schedule Assessment</li> <li>• Coordinate with the cost analyst in order to validate/cross-check IMS analysis results with the CPR analysis results</li> <li>• Coordinate with the cost analyst in order to validate/cross-check IMS impact on the EAC</li> <li>• Evaluates the Integrated Master Schedule verifying consistency with Earned Value Drivers, and assesses Critical Path status and Milestone Status</li> <li>• Is knowledgeable and conversant with the ANSI 748 schedule guidelines and IMS DID requirements and discipline/requirements they impose on industry</li> </ul>	<ul style="list-style-type: none"> <li>• Provide the customer a schedule health metrics analysis which clearly and concisely provides sufficient information required by the customer to make and support informed program direction decisions.</li> <li>• Understands Schedule Risk Analysis (SRA) findings and interprets results for the customer/Program Manager</li> <li>• Provide quantitative schedule impact on EAC data.</li> <li>• Lead a briefing/review of IMS analysis results with internal management and the customer/Program Management</li> <li>• Be able to provide schedule analysis training to other groups (CAMs, Program Managers, etc.)</li> <li>• Advocates/promotes the use of schedule analysis to pro-actively manage program risks, issues, and opportunities</li> <li>• Assists Program teams in developing and tailoring a suite of schedule execution metrics in conjunction with other forms of schedule analysis (Critical/Driving Path Analysis, Schedule Risk Assessment, and Schedule Health Assessment etc.) and using them on a recurring basis to interpret and understand schedule information.</li> <li>• Uses execution metrics to identify potential issues, propose and implement solutions, and assess the effectiveness of those solutions (not to simply have use metrics as a report card).</li> </ul>
<p><b>2.2.3.2.4 Develop and Analyze Estimates At Complete (EAC)</b></p>	<ul style="list-style-type: none"> <li>• Understand/define an EAC, who creates an EAC, and how and when EACs are used</li> <li>• Understand the EAC monthly review process as a key communication tool between the CAMs and Program Management</li> <li>• Understand the differences between monthly and comprehensive EAC assessments</li> <li>• Understand how a comprehensive EAC is developed and methods used to validate</li> <li>• Understand the difference between a supplier LRE (Latest Revised Estimate) and a program office EAC</li> <li>• Understand the different metrics and toolsets that can be utilized to test the reasonableness of an EAC</li> <li>• Understands how predictive performance data is used</li> <li>• Understands how to and can develop an independent</li> </ul>	<ul style="list-style-type: none"> <li>• Participates in independent review teams when concerns arise about a contractor's performance.</li> <li>• Periodically analyze the supplier's LRE for reasonableness and identify areas which require detailed analysis</li> <li>• Periodically analyze the program office EAC for reasonableness and identify areas which require detailed analysis</li> <li>• Work with the supplier during comprehensive LRE updates in an effort to gain insight into their ETC and risk evaluation</li> <li>• Participate in a program office EAC update</li> <li>• Develops detailed EACs and methods to validate results</li> <li>• Works with members of the program/project team and/or IPTs (technical, management and cost</li> </ul>	<ul style="list-style-type: none"> <li>• Provide guidance to the customer in making EAC adjustments and conducting independent assessments</li> <li>• Lead independent review teams when concerns arise about a contractor's performance and brief results to the customer</li> <li>• Work with the supplier during comprehensive LRE updates in an effort to gain insight into their ETC and risk evaluation and communicate results to the customer</li> <li>• Lead a customer EAC update, prepare a comprehensive briefing to the customer and present the briefing</li> <li>• Review others' EACs to ensure appropriate methodologies were applied</li> </ul>

	<p>Estimate-at-Completion based on standard EVM formulas</p> <ul style="list-style-type: none"> <li>• Understands how TCPI is used to assess the credibility of EACs</li> </ul>	<p>counterparts) to generate independent assessments of all costs and schedule impacts likely to be incurred to complete the effort that is on contract.</p> <ul style="list-style-type: none"> <li>• Uses EVM cost metrics to gauge realism of EAC projections</li> <li>• Ensures that staffing assessments and Estimates at Complete are consistent with the forecasted IMS.</li> </ul>	
<p>2.2.3.2.5 Communicate Analysis Results (this section pertains specifically to communicating analysis, review findings. etc.)</p>	<ul style="list-style-type: none"> <li>• Understand the significance and use of the data, metrics, charts, etc. used in communicating analysis to internal management and the customer</li> </ul>	<ul style="list-style-type: none"> <li>• Look for potential revisions/modifications which can be made to improve the analysis process</li> <li>• Briefing analysis reports to internal management and the customer</li> <li>• Reviews and improves the EVM communication process with the program office</li> <li>• Explain the significance of various aspects/details of the analysis to the customer</li> </ul>	<ul style="list-style-type: none"> <li>• Able to adapt the message and product to meet the specific needs of the audience</li> <li>• Presents findings to senior leaders as needed</li> </ul>
<p>2.2.3.3 Understands the Performance Measurement Baseline (PMB) Maintenance Process</p>	<ul style="list-style-type: none"> <li>• Develops an understanding of the importance of the Performance Management Baseline and its use as a realistic time-phased spread of budget/resources to the baselined schedule.</li> <li>• Understands the concepts/processes for disciplined incorporation of authorized contract changes and internal replanning. Understands the concepts of rolling wave planning, internal replanning, and Over Target Baseline/Over Target Schedule.</li> <li>• Understands that incorporating changes to the PMB accurately and in a timely manner is vitally important for maintaining the effectiveness of the EVM system</li> <li>• Understands the role of EVM System surveillance in keeping the PMB current</li> <li>• Understand Baseline Control Objectives</li> <li>• Understand Baseline Change Categories</li> </ul>	<ul style="list-style-type: none"> <li>• Ability to review and analyze contract data submittals to ensure appropriate implementation and management to the Performance Management Baseline.</li> <li>• Conducts analysis to verify the contractors' implementation of a disciplined approach for incorporation of authorized contract changes and internal replanning.</li> <li>• Reviews results of contractor rolling wave planning, internal replanning, and use of Over Target Baseline/Over Target Schedule to ensure compliance with applicable policy and maintenance of a realistic Performance Management Baseline.</li> <li>• Understands the ANSI 748 Guidelines related to Incorporating PMB changes in an EVM System</li> </ul>	<ul style="list-style-type: none"> <li>• Leads program team in ensuring appropriate implementation and management of the Program Management Baseline.</li> <li>• Provides advice to program managers on appropriateness of contractor approaches to incorporation of baseline changes, rolling wave planning, internal replanning and approval of Over Target Baseline/Over Target Schedule actions.</li> <li>• Ensures open collaboration between the contractor and customer on baseline changes that impact or alter program execution</li> <li>• Ensures all stakeholders clearly understand the cost and schedule impacts of significant baseline changes.</li> <li>• Ensures contractual and internally defined commitment dates are considered when incorporating baseline changes to avoid unintended downstream impacts.</li> <li>• Works with contractor, customer, and contract administration office to assess and improve baseline maintenance process</li> </ul>
<p>2.2.3.4 System Validation, Surveillance, Maintenance, Deficiencies</p>	<ul style="list-style-type: none"> <li>• Develops understanding of process for DOD validation and acceptance of contractor EVMS compliance and the roles of the EVM Practitioner in supporting the validation process.</li> <li>• Develops an understanding of the system surveillance process and roles and responsibilities of the involved organizations.</li> <li>• Understands organizational roles and responsibilities</li> </ul>	<ul style="list-style-type: none"> <li>• Participates as team member supporting EVM system reviews.</li> <li>• As an EVM Practitioner, identifies system trends in EVM data symptomatic of systemic deficiencies for use by system surveillance organization.</li> <li>• Interacts with system surveillance organization to support review and progressing of EVM system changes and resolution of system deficiencies.</li> </ul>	<ul style="list-style-type: none"> <li>• Leads organization efforts to ensure appropriate validation of contractor EVMS compliance to meet contract requirements.</li> <li>• Leads efforts for identification of system deficiencies and interaction with the system surveillance organization for review and completion of system changes and resolution of system deficiencies.</li> <li>• Participates as a senior team member in reviews for</li> </ul>

	<p>and process for approval of EVM system changes, identification and resolution of system deficiencies, and system reviews such as reviews for cause, Nunn-McCurdy risk assessments, and other non-DCMA situational reviews.</p> <ul style="list-style-type: none"> <li>• Shipbuilding program EVM Practitioners develop an understanding of the unique responsibilities of SUPSHIP organizations in system surveillance and participate as a team member during surveillance events. SUPSHIP EVM Practitioners understand the unique roles of the SUPSHIP in review and approval of system changes, documentation and resolution of system deficiencies, and participate as supporting team members in shipbuilder EVMS reviews.</li> </ul>	<ul style="list-style-type: none"> <li>• SUPSHIP EVM Practitioners review and support approval of system changes, documentation and resolution of system deficiencies, and participate as team members in shipbuilder EVMS reviews.</li> </ul>	<p>cause and other situational reviews.</p> <ul style="list-style-type: none"> <li>• SUPSHIP personnel act as lead liaison in system validation of shipbuilder EVMS to meet compliance.</li> <li>- Lead command efforts in review and approval of system changes and in resolution of system deficiencies.</li> <li>- Act as a team or functional lead in reviews for cause, system surveillance or other situational reviews.</li> </ul>
<p><b>2.3 EVM Integration with other Management Disciplines</b></p>	<p>Develops an awareness and understanding of EVM Practitioner roles and responsibilities required to integrate EVM with Integrated Program Management, Technical Management, Schedule Management, Cost Estimating, Risk Management, and Contract/Subcontract management disciplines. Performs fundamental and routine EVM integration activities while supporting a Mid/Journey or Senior/Expert Level EVM Practitioner as a member of a program/project team.</p>	<p>Applies, performs and/or leads EVM related IPM activities as a member of program/project teams and demonstrates ability to integrate EVM tools, techniques, and best practices with other management discipline planning, reporting and decision-making activities at the project level with minimal Senior/Expert level assistance.</p>	<p>Advocates, leads, oversees, and influences decisions related to integrating EVM activities with other IPM disciplines at the program/project, Service, Agency, or Center levels; demonstrates a high level of competency in most all EVM Practitioner IPM integration activities; and contributes to internal and external Service, Agency, or Center EVM related IPM goals.</p>

<p><b>2.3.1 Integrated Program/Performance Management</b></p>		<ul style="list-style-type: none"> <li>• Gains understanding of Integrated Program Management fundamentals including:             <ul style="list-style-type: none"> <li>- The IPM Framework (Program Definition, Execution Planning, Program Execution)</li> <li>- IPM Key Players, Organizations, Roles and Responsibilities</li> <li>- IPM within the PMO</li> <li>- The DAU 12 Step IPM Model</li> </ul> </li> <li>• Demonstrates basic knowledge of and can discuss principle linkages between IPM and the following:             <ul style="list-style-type: none"> <li>- System Technical and Program Requirements, and CAIV</li> <li>- Developing a Top Level Program Approach, Budget and Schedule</li> <li>- Risk Management Planning and Initial Assessment</li> <li>- Acquisition and Support Strategy</li> <li>- The Request For Proposal (RFP)</li> <li>- The Work Breakdown Structure (WBS)</li> <li>- The Statement of Work (SOW)</li> <li>- Allocated Requirements and the Specification Tree</li> <li>- Integrated Product Teams (IPT)</li> <li>- Risk Mitigation Planning</li> <li>- Cost Estimates</li> <li>- Integrated Master Plan (IMP) and Integrated Master Schedule (IMS)</li> <li>- Source Selection/Contract Award</li> <li>- Earned Value Management System (EVMS)</li> <li>- Metrics</li> <li>- Risk Management and Updates</li> <li>- Management Reviews</li> </ul> </li> </ul>	
<p><b>2.3.2 Technical Baseline/Technical Performance Measurement - Principle Linkages to EVM/S</b></p>		<ul style="list-style-type: none"> <li>• Strives to gain understanding of systems engineering practices, technical domains, and EVM/S integration points including:             <ul style="list-style-type: none"> <li>• Aware that key program requirements as defined in the SOW/SOO and SRD provide a list of potential technical areas/products to be measured and tracked.</li> <li>• Aware that metrics/TPMs should be measured to track achievement of allocated requirements by subsystem.</li> <li>• Aware that tight correlation between the IPT, WBS structure, and the IMS structure enables a single IPT take to take the responsibility for a particular metric/TPM.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Uses technical performance metrics and TPMs to support CPR and IMS analysis</li> <li>• Uses the IMS to help the technical team verify the entire technical baseline is included in the baseline plan</li> </ul>

<p><b>2.3.3 Schedule Management</b>  <b>- Principle Linkages to EVM/S</b></p>	<ul style="list-style-type: none"> <li>• Define Integrated Master Plan (IMP) and Integrated Master Schedule (IMS) and their relationship to program management</li> <li>• Understand Concepts of Resource Loading and Resource Leveling</li> <li>• Understand the difference between EVM status and schedule status</li> <li>• Understands that the IMS is the cornerstone document in the Integrated Program Management process and that programs/projects should integrate the IMS with other management systems such as the Financial System, Earned Value System, Time Tracking System, Material Requirements Planning System, Risk &amp; Opportunity Management, and Requirements Management Systems</li> <li>• Becomes familiar with the eight Generally Accepted Scheduling Principles (GASP) over-arching tenets for building, maintaining, and using schedules as effective management tools (see the NDIA PASEG).</li> <li>• Understands /is conversant with schedule status updates, including status updating to “Time Now”, forecasting, and estimates at complete (EAC)</li> </ul>	<ul style="list-style-type: none"> <li>• Demonstrate ability to develop the needed 'business rhythm', to include 'Leading Indicators' and 'data' presentations, for their respective area of ownership/responsibility for use by the needed participants (team members, peer/counter-parts).</li> <li>• Demonstrate ability to develop the needed 'data' presentations on their respective areas to support higher level business rhythm meetings (to facilitate identification of status and to help identify potential risks for mitigations analysis)</li> <li>• Capable of assessing scheduling metrics and data (e.g., Current Execution Index/ Volatility Index, Driving Paths, Critical paths) to determine where actions are needed in their respective areas.</li> <li>• Understands scheduling terms and their functions (Total Float, Free Float, Start / Finish Variances, Late Start / Finish etc.) and uses them to accurately articulate current program schedule status, as well as at completion forecasts.</li> <li>• Uses the IMS to gain insight into problems that are potentially masked in the CPR</li> <li>• Understands GASP and its impact on program management</li> <li>• Understands management value of and applies some key IMS analyses on customer programs/projects (i.e., Critical Path Analysis, Schedule Risk Assessment (SRA), Critical Path Length Index (CPLI), Baseline Execution Index (BEI), Duration vs. Scope Based %, What-if Analysis)</li> <li>• Analyze the Critical Path and Driving Paths and prepare a clear, concise analysis detailing the status/condition for Program Management utilization</li> </ul>	<ul style="list-style-type: none"> <li>• Translates scheduling policy and guidance into practical approaches for improving scheduling capabilities and outputs across Government and Industry.</li> <li>• Seeks to obtain/influence Leadership buy-in and commitment to manage using the IMS (e.g., influence decisions regarding budgeting for/expending resources to obtain dedicated, properly skilled resources to analyze contractor IMS CDRL deliverables)</li> </ul>
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<p><b>2.3.4 Risk Management - Principle Linkages to EVM/S</b></p>	<ul style="list-style-type: none"> <li>• Becomes familiar with general Risk and Opportunity Management Principles and processes</li> <li>• Understands risk mitigation planning describes how the risks are to be handled during the Program Execution Phase.</li> <li>• Understands risk mitigation plans are reflected as activities in the IMS.</li> <li>• Understands all risk handling actions have impacts on cost and schedule, which is reflected in the EVM data.</li> <li>• Understands Metrics and TPMs reflect the degree to which risk handling actions were effective</li> <li>• Understands that periodic risk management reviews with program leadership are needed to provide necessary discipline and visibility into key program risks</li> <li>• Analyzes metrics to determine ongoing risk status.</li> </ul>	<ul style="list-style-type: none"> <li>• Contributes to development of risk management approach.</li> <li>• Participates in the analysis, quantification, and prioritization of risks</li> <li>• Assists in the monitoring of risk mitigation strategies.</li> <li>• Works with PMO and contractor to ensure that risk mitigation planning is done in concert with the overall program schedule (e.g., a specific mitigation action may have entirely different consequences when examined in the context of the other interrelated activities).</li> <li>• Works with PMO and contractor to ensure risk mitigation activities are budgeted and included as tasks in the IMS</li> <li>• Provides value-added insight into how risk mitigation affects cost/schedule planning and performance</li> <li>• Ensures risk mitigation or opportunity capture plans from the Risk Management register are integrated directly into the Integrated Master Schedule (IMS)</li> </ul>	<ul style="list-style-type: none"> <li>• Influences risk management approach</li> <li>• Influences risk mitigation strategies and program direction</li> <li>• Works with PMO and Contractor organizations to ensure that source selection includes evaluation of risk mitigation activities—and extent to which the Government believes these mitigation plans will be effective</li> </ul>
<p><b>2.3.5 Cost Estimating - Principle Linkages to EVM/S</b></p>	<ul style="list-style-type: none"> <li>• Understands methods for developing cost estimates</li> <li>• Understands concepts of confidence levels and uncertainty</li> </ul>	<ul style="list-style-type: none"> <li>• Works with cost estimators to ensure estimates are developed using the program/project work breakdown structure so that all costs are accounted for in the estimate</li> <li>• Collaborates with the cost estimators/practitioners to define the products, activities, trade-offs, and required assessments for independent, objective cost estimates and analyses.</li> </ul>	<ul style="list-style-type: none"> <li>• Seeks inputs and different approaches from the cost estimating community when developing estimates at complete</li> <li>• Uses EVM and IMS performance information to provide inputs and insights to cost estimators for program estimate updates</li> </ul>
<p><b>2.3.6 Contract/Subcontract Management - Principle Linkages to EVM/S</b></p>	<ul style="list-style-type: none"> <li>• Becomes familiar with the sections/clauses of the prime contract which include EVM/S related clauses</li> <li>• Develops an understanding of EVM/S flow down requirements from prime contractor to subcontractors</li> <li>• Develops an understanding of how prime contractor will monitor/report subcontractor EVM performance</li> </ul>	<ul style="list-style-type: none"> <li>• Ensures sections/clauses of the prime contract are in place which require appropriate EVM/S flow down requirements are included</li> <li>• Reviews prime contractor's and subcontractors' EVM submissions in order to monitor adequacy subcontractor EVM performance reporting</li> <li>• Ensures the prime contractor's methodology of integrating subcontractor/external efforts is consistent with contractual obligations and provides adequate management insight</li> </ul>	<ul style="list-style-type: none"> <li>• Works with prime contractor to improve/maintain adequacy of subcontractor EVM performance reporting</li> <li>• Provides alternatives for integration of subcontractor information and articulates the relative strengths and weaknesses of each approach</li> </ul>
<p><b>2.4 Advanced/Specialty EVM Competencies</b></p>	<p>Develops a basic awareness and understanding of advanced/specialty EVM competencies such as OTB/OTS implementations, conduct of SRAs, EVM implementation in FP/FPI contract environments, use of EVM tools, and Executive Reporting responsibilities. As a member of a project team, performs routine activities associated with these advanced/specialty competencies under supervision of a Mid or Senior Level EVM Practitioner.</p>	<p>Applies advanced/specialty EVM competencies as a member of program/project teams. Performs, integrates, and/or leads OTB/OTS implementations, conduct of SRAs, EVM implementation in FP/FPI contract environments, use of EVM tools, and Executive Reporting responsibilities at the program/project level with minimal Senior level assistance.</p>	<p>Advocates, applies, leads, oversees, and presents results of EVM Practitioner advanced/specialty competency activities at the program/project, Service, Agency, or Center levels. Demonstrates advanced expertise in most of the EVM Practitioner competencies in this area and contributes to related internal and external Project, Service, Agency, or Center goals.</p>

<p><b>2.4.1 OTB/OTS Implementation</b></p>	<ul style="list-style-type: none"> <li>• Gains basic awareness and understanding of the concept of formal reprogramming, whether through the OTB and/or the OTS process and the conditions under which use of an OTB/OTS is appropriate</li> <li>• Understands the government review and approval process for an OTB/OTS</li> <li>• Understands the general process a supplier uses to implement/incorporate and OTB/OTS</li> <li>• Develops an understanding of EVM Practitioner roles and responsibilities in an OTB/OTS approval/implementation</li> <li>• Understands the contract performance implications/ramifications of implementing an OTB/OTS including funding implications</li> <li>• Assists Mid/Senior level EVM practitioners in implementing an OTB/OTS as a member of a program/project team.</li> </ul>	<ul style="list-style-type: none"> <li>• Supports Program Manager in OTB/OTS decisions by explaining the decisions, processes, and impacts that must be considered before, during, and after OTB/OTS implementation</li> <li>• Participates in the review/approval process for an OTB/OTS</li> <li>• Participates with the supplier to insure the OTB/OTS is implemented properly and in a timely manner</li> <li>• Facilitates a review of the implemented OTB/OTS baseline, verifying it was implemented as approved</li> <li>• Assists program or organizational communities in OTB/OTS approval, due diligence review, and implementation processes.</li> </ul>	<ul style="list-style-type: none"> <li>• Provides expert level guidance to the customer/Program Manager regarding OTB/OTS approval and implementation processes, including whether a follow-on IBR should be conducted in order to validate the adequacy of the revised Program Management Baseline and how Reprogramming can be used as a management tool</li> <li>• Informs decision makers of potential abuses of the OTB/OTS process that can result in unrealistic baselines and lack of credible performance trend data</li> </ul>
<p><b>2.4.2 Schedule Risk Assessment (SRA)</b></p>	<ul style="list-style-type: none"> <li>• Qualified to entry level of 2.2.4.5.2 Schedule Analysis.</li> <li>• Knowledge of IMS Contract requirements (Data Item Deliverables and CDRLs) in relation to SRAs.</li> <li>• Basic knowledge of SRA process.</li> <li>• Capable of facilitating an SRA with 'Senior' Level SRA qualified support.</li> <li>• Develops an awareness and understanding of the SRA Process</li> <li>• Understands the major components of the SRA (Determining Risk Areas, Performing a Sensitivity Analysis, Quantifying Risk using Dates)</li> </ul>	<ul style="list-style-type: none"> <li>• Qualified to Mid/Journey level of 2.2.4.5.2 Schedule Analysis.</li> <li>• Capable of operating the SRA tool without error.</li> <li>• Capable of facilitating an SRA without a 'Senior' Level SRA qualified support.</li> <li>• Capable of training program team on the Program SRA process.</li> <li>• Guides and supports conduct of SRAs in accordance with IMS DID requirements and in conjunction with the Integrated Baseline Review (IBR) and other specified milestones.</li> <li>• Capable of operating the SRA tool with 'Senior' Level SRA qualified support.</li> </ul>	<ul style="list-style-type: none"> <li>• Qualified to Senior/ Expert level of 2.2.4.5.2 Schedule Analysis.</li> <li>• Experience in performing multiple SRAs.</li> <li>• Capable of teaching scheduling analysts (entry/mid-level personnel) the step-by-step SRA process as needed for the analyst (not program team).</li> </ul>
<p><b>2.4.3 Schedule Specialist</b></p>	<ul style="list-style-type: none"> <li>• Learn how to develop an IMS</li> <li>• Identify Best Practices for generating an IMS</li> <li>• Understand how to update a schedule</li> <li>• Describes methods of incorporating external schedule information in the IMS including a Subcontract schedule integration, interface Handoff Milestones and Schedule Visibility Tasks.</li> <li>• Understands schedule baseline maintenance, including the baseline change management process and the rolling wave process.</li> <li>• Be able to utilize available scheduling tools to perform schedule analysis</li> <li>• Assist mid and senior level EVM Practitioners in assessing schedule status by understanding basic scheduling terminology and techniques</li> </ul>	<ul style="list-style-type: none"> <li>• Participate in a Schedule Risk Analysis (SRA) and participate in preparing an analysis detailing the findings for Program Management utilization</li> <li>• Briefs IMS analysis results to the customer/Program Management</li> <li>• Is knowledgeable of/conversant with several different major scheduling software tools (MS Project, Primavera, Artemis, etc.,)</li> <li>• Analyzes all aspects of the project schedule, including:             <ul style="list-style-type: none"> <li>- Baseline vs. current schedules</li> <li>- Delays</li> <li>- Critical Path impacts</li> <li>- Status of critical milestones</li> <li>- Out of Sequence work and disruptions</li> <li>- Acceleration;</li> <li>- Resource usage</li> <li>- Conduct Integrated forecast (a range of scenarios for schedule and cost including the critical path)</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Uses/applies the PASEG eight Generally Accepted Scheduling Principles (GASP) as a framework for developing training courses, for conducting schedule reporting and analysis, and for writing program supplemental guidance</li> <li>• Helps program teams to build, maintain, analyze and manage robust and dynamic schedules for improved program execution</li> </ul>

		<ul style="list-style-type: none"><li>• Identifies Critical/Driving paths and performs CP analysis to ensure that management is focusing on the correct tasks to prevent slippage of the program end date</li><li>• Ensures the accuracy of the CP through monthly validation of task durations and logical relationships</li><li>• Ensures that the schedule analysis clearly communicates the program's current progress against contractual requirements.</li><li>• Works with PM to construct a schedule metrics package that serves the program's needs</li><li>• Uses/applies the PASEG eight Generally Accepted Scheduling Principles (GASP) as a governance tool when evaluating scheduling processes, techniques, or tools.</li></ul>	
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### 3. Experience

	Entry/Apprentice Level	Mid/Journey Level	Senior/Expert Level
EVM/IPM related experience (Recommended)	<ul style="list-style-type: none"> <li>At least one year of EVM or closely related experience within the last five years is recommended to be qualified for hire at Entry/Apprentice level.</li> <li>Experience may include but not be limited to constructing a work breakdown structure; preparing project EV analysis documents; tailoring EVM acquisition documents to ensure that quality, effective, efficient EVM/EVMS products are delivered; analyzing and/or developing EV data; EVMS monitoring proficiency; assisting with quality assurance; risk management, and budget development activities</li> <li>Three years at entry/apprentice level required for consideration/reassignment to Mid/Journey Level position</li> </ul>	<ul style="list-style-type: none"> <li>At least three years of experience within the last five years that includes experience at the EVM Practitioner entry/apprentice level or equivalent experience is recommended to be qualified for hire at Mid/Journey level</li> <li>Five years at mid/journey level (8 years total) required for consideration/reassignment to Senior/Expert Level position</li> </ul>	<ul style="list-style-type: none"> <li>At least eight years of experience within the last five years that includes experience at the EVM entry and mid/journey levels or equivalent experience is recommended to be hired at Senior/Expert level</li> <li>Seven years at Senior/Expert level (15 years total) required for consideration/reassignment to higher level position (i.e. an S.E.S position)</li> </ul>
Rotation to outside organization		Recommended	Recommended

### 4. Certifications

	Entry/Apprentice Level	Mid/Journey Level	Senior/Expert Level
<b>Association for the Advancement of Cost Engineering International (AACEI) Certifications</b>			
Earned Value Professional (EVP)			Suggested
Planning and Scheduling Professional (PSP)			Suggested after EV-P cert
PMI-SP			Suggested
PMP			Suggested

## 5. Formal Education

	Entry/Apprentice Level	Mid/Journey Level	Senior/Expert Level
Bachelor's Degree	Suggested	Suggested	Suggested
Master's Degree		Suggested	Suggested

## 6. Training

	Entry/Apprentice Level	Mid/Journey Level	Senior/Expert Level
DAU Core Certification Standards Level 1	Mandatory	Mandatory	Mandatory
DAU Core Certification Standards Level 2		Mandatory	Mandatory
DAU Core Certification Standards Level 3		Recommended	Mandatory
EVM 262 EVMS Validation and Surveillance		Recommended	Recommended
EVM 263 Principles of Schedule Management		Recommended	Recommended
CLB 14 Acquisition Reporting Concepts and Policy Requirements for APB, DAES, and SAR	Recommended	Recommended	Recommended
CLB 16 Introduction to Earned Value Management	Recommended	Recommended	Recommended
CLB 17 Performance Measurement Baseline	Recommended	Recommended	Recommended
CLB 18 Earned Value and Financial Management Reports	Recommended	Recommended	Recommended
CLB 19 Estimate at Completion	Recommended	Recommended	Recommended
CLB 20 Baseline Maintenance	Recommended	Recommended	Recommended

CLB 026 Forecasting Techniques		Recommended	Recommended
CLC 007 Contract Source Selection		Recommended	Recommended
CLC 011 Contracting for the Rest of Us		Recommended	Recommended
CLC 026 Performance-Based Payments Overview (Fixed Price Contract)			Recommended
CLC 040 Predictive Analysis and Scheduling		Recommended	Recommended
CLC 103 Facilities Capital Cost of Money		Recommended	Recommended
CLC 104 Analyzing Profit or Fee		Recommended	Recommended
CLM 005 Industry Proposals and Communication			Recommended
CLM 012 Scheduling	Recommended	Recommended	Recommended
CLM 013 Work-Breakdown Structure	Recommended	Recommended	Recommended
CLM 014 IPT Management and Leadership		Recommended	Recommended
CLM 17 Risk Management		Recommended	Recommended
CLM 024 Contracting Overview		Recommended	Recommended
CLM 031 Improved Statement of Work		Recommended	Recommended
* FAI FAC-P/PM Certification (EVM related courses) <ul style="list-style-type: none"> <li>• PPM-103 Introduction to EVM and Cost Estimating</li> <li>• PPM-203 Intermediate EVM and Cost Estimating</li> <li>• PPM-303 Advanced EVM and Cost Estimating</li> </ul>	SeeTable Footnote	See Table Footnote	See Table Footnote
Earned Value Community of Practice (EVM CoP) Graduate Training Certification in EVM (Formerly known as PMI-CPM)	100/200 Level Suggested	300/400 Level Suggested	Graduate Suggested
ICAF			Suggested

War College			Suggested
Leadership Training		Suggested	Suggested
Executive Leadership Program		Suggested	Suggested

\* FAI FAC PPM courses are suggested alternatives to DAWIA Certification for EVM Practionioners who are not members of the in the BUS-FM Community.

## 7. Leadership Skills

Leadership skills encompass a broad range of skills/techniques developed during the career progression that include the competencies required to lead organizations that drive for results, serve customers and to build successful teams and coalitions within and outside of the organization. These include the following skills

	Entry/Apprentice Level	Mid/Journey Level	Senior/Expert Level
Interpersonal - Treats others with courtesy, sensitivity, and respect. Considers and responds appropriately to the needs and feelings of different people in different situations. Effectively interacts with others including emphasizing listening, reading and influencing others indirectly through writing and speaking. Ability to work with others to support effective consensus building.	X	X	X
Integrity/Honesty - Acts on conviction and the willingness to do right. Has a moral compass that serves as the voice of self-control. Honesty in dealings with others provides the foundation for trust.	X	X	X
Flexibility - Is open to change and new information; rapidly adapts to new information, changing conditions or unexpected obstacles.	X	X	X
Accountability - Holds self and others accountable for measurable high-quality, timely and cost effective results. Determines objectives, sets priorities, and delegates work. Accepts	X	X	X

responsibility for mistakes. Complies with established control systems and rules.			
Develop Others (Training & Mentoring) - 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.		X	X
Partnering - Develops networks and builds alliances; collaborates across boundaries to build strategic relationships and achieve common goals.		X	X
Strategic Thinking - Formulates objectives and priorities, and implements plans consistent with the long term interests of the organization in a global environment. Capitalizes on opportunities and manages risks.		X	X
Political Savvy - Identifies the internal and external politics that impact the work of the organization. Perceives organizational and political reality and acts accordingly.			X
External Awareness - Understands and keeps up-to-date on local, national, and international policies and trends that affect the organization and shape stakeholder's views; is aware of the organization's impact on the external environment.			X
Vision - Takes a long-term view and builds a shared vision with others; acts as a catalyst for organizational change. Influences others to translate vision into action. Ability to define the desired long term end state. Develops a plan/approach to meet the long term goal.			X

## 7. Business Acumen Skills

	Entry/Apprentice Level	Mid/Journey Level	Senior/Expert Level
Ability to communicate effectively - Effectively interact with others through writing and speaking. Makes clear and convincing oral presentations. Listens effectively; clarifies information as needed. Writes in a clear, concise, organized, and convincing manner for the intended audience.	X	X	X
Ability to use relevant software applications - Effectively uses software applications and standard analytic tools to meet mission requirements.	X	X	X
Awareness of customer needs - Anticipates and meets the needs of both internal and external customers. Delivers high-quality products and services; is committed to continuous improvement.	X	X	X
Ability to solve problems - Identifies and analyzes problems; weighs relevance and accuracy of information; generates and evaluates alternative solutions; makes recommendations.		X	X
Ability to influence/negotiate - Persuades others; builds consensus through give and take; gains cooperation from others to obtain information and accomplish goals.		X	X

## Appendix A: DAWIA BUS-FM Certification

### Level I Certification

CERTIFICATION STANDARDS & CORE PLUS DEVELOPMENT GUIDE BUSINESS – FINANCIAL MANAGEMENT LEVEL I		
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	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	
Core Certification Standards (required for DAWIA certification)		
Acquisition Training	<u>ACQ 101</u> Fundamentals of Systems Acquisition Management	
Functional Training	<ul style="list-style-type: none"> <li>● <u>BCF 102</u> Fundamentals of Earned Value Management</li> <li>● <u>BCF 103</u> Fundamentals of Business Financial Management</li> <li>● <u>BCF 106</u> Fundamentals of Cost Analysis</li> </ul>	
Education	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
<b>Training</b>		<b>Bgt/Prg FM Analyst</b>
		<b>EVM Analyst</b>
<u>BCF 107</u> Applied Cost Analysis (R)		✓
<u>CLB 014</u> Acquisition Reporting Concepts and Policy Requirements for APB, DAES, and SAR		✓

<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	✓	✓
<b>Education</b>		
Associate in Applied Science (A.A.S.) or equivalent in business or a business-related field		
<b>Experience</b>		
2 years of acquisition experience in Budgeting, Financial and/or Earned Value Management in support of an acquisition program		
<b>Notes:</b>		
<p>1 The Core Certification Standards section lists the training, education, and experience REQUIRED for certification at this level.</p> <p>2 "(R)" following a course title indicates the course is delivered as resident based instruction.</p> <p>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.</p>		

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

## Level II Certification

CERTIFICATION STANDARDS & CORE PLUS DEVELOPMENT GUIDE BUSINESS – FINANCIAL MANAGEMENT LEVEL II		
Type of Assignment	Representative Activities	
Budget/Program FM Analyst	<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>	
EVM Analyst	<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)		
Acquisition Training	<ul style="list-style-type: none"> <li>● <a href="#">ACQ 201A</a> Intermediate Systems Acquisition, Part A</li> <li>● <a href="#">ACQ 201B</a> Intermediate Systems Acquisition, Part B (R)</li> </ul>	
Functional Training	<ul style="list-style-type: none"> <li>● <a href="#">BCF 106</a> Fundamentals of Cost Analysis</li> <li>● If not already completed (as required) at Level I, AND</li> <li>● <a href="#">BCF 203</a> Intermediate Earned Value Management (R)</li> <li>● <a href="#">BCF 205</a> Contractor Business Strategies (R)</li> <li>● <a href="#">BCF 211</a> Acquisition Business Management (R)</li> <li>● <a href="#">CLM 017</a> Risk Management</li> <li>● <a href="#">CLM 024</a> Contracting Overview</li> </ul>	
Education	Formal education not required for certification	
Experience	4 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
<a href="#">BCF 204</a> Intermediate Cost Analysis (R)		✓
<a href="#">BCF 206</a> Cost Risk Analysis (R)		✓

<a href="#">BCF 207</a> Economic Analysis (R)	✓	✓
<a href="#">BCF 215</a> Operating and Support Cost Analysis (R)	✓	✓
<a href="#">BCF 262</a> EVMS Validation and Surveillance (R)		✓
<a href="#">BCF 263</a> Principles of Schedule Management (R)	✓	✓
<a href="#">CLC 005</a> Simplified Acquisition Procedures	✓	✓
<a href="#">CLC 007</a> Contract Source Selection	✓	✓
<a href="#">CLC 010</a> Proper Use of Non-DoD Contracts	✓	✓
<a href="#">CLC 011</a> Contracting for the Rest of Us	✓	
<a href="#">CLC 106</a> Contracting Officer's Representative with a Mission Focus	✓	✓
<a href="#">CLG 001</a> DoD Government Purchase Card	✓	
<a href="#">CLM 012</a> Scheduling	✓	✓
<a href="#">CLM 040</a> Proper Financial Accounting Treatments for Military Equipment	✓	
<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.

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

Level III Certification

**CERTIFICATION STANDARDS & CORE PLUS DEVELOPMENT GUIDE  
BUSINESS – FINANCIAL MANAGEMENT LEVEL III**

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>		
<b>Core Certification Standards</b> (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>● <a href="#">BCF 301</a> Business, Cost Estimating, and Financial Management Workshop (R)</li> <li>● <a href="#">CLM 013</a> Work-Breakdown Structure</li> <li>● <a href="#">CLM 031</a> 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		
<b>Core Plus Development Guide</b> (desired training, education, and experience)		<b>Type of Assignment</b>	
<b>Training</b>		<b>Bgt/Prg FM Analyst</b>	<b>EVM Analyst</b>
<a href="#">ACQ 450</a> Leading in the Acquisition Environment (R)		✓	✓

<a href="#">ACQ 451</a> Integrated Acquisition for Decision Makers (R)	✓	✓
<a href="#">ACQ 452</a> Forging Stakeholder Relationships (R)	✓	✓
<a href="#">CLL 015</a> Product Support Business Case Analysis (BCA)	✓	✓
<a href="#">CLM 014</a> IPT Management and Leadership	✓	✓
<a href="#">CLM 200</a> Item-Unique Identification	✓	
<a href="#">CON 110</a> Mission-Support Planning	✓	
<a href="#">CON 111</a> Mission Strategy Execution	✓	
<a href="#">CON 112</a> Mission-Performance Assessment	✓	
<a href="#">PMT 251</a> Program Management Tools Course, Part I	✓	✓
<a href="#">PMT 257</a> Program Management Tools Course, Part II	✓	✓
<a href="#">PMT 352A</a> Program Management Office Course, Part A	✓	✓
<a href="#">PMT 352B</a> Program Management Office Course, Part B (R)	✓	✓
<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.

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