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IN REPLY  
REFER TO

FOXP

MAR 27 2000

MEMORANDUM FOR DLA EXECUTIVE TEAM  
COMMANDERS, PRIMARY LEVEL FIELD ACTIVITIES

SUBJECT: DLA Financial Manager Professional Development Guide

Over the last few years, many audit reports have cited personnel deficiencies, such as lack of accounting experience or competencies, and inadequate training, as one of the causes of DoD's serious financial management deficiencies. In response to one of the audits that specifically addressed enhanced training for DoD financial managers, the Under Secretary of Defense (Comptroller) agreed that the Military Departments and Defense Agencies needed to update standards for a highly trained and qualified workforce, accommodating their differences in organizational structures and work processes.

Both the DLA Strategic Plan 2000 and the DLA Comptroller Business Plan recognize the need for publishing financial management professional development guidelines. The attached document provides these guidelines, including a step-by-step approach to identifying deficiencies in core competencies and actions necessary to correct them. The guide addresses competencies for financial management-related management analysts, as well as the traditional financial specialists. Furthermore, the guide recognizes the move toward integration among planning, budgeting, analytical and accountability activities of the two disciplines.

The guidelines provided *do not mandate* training, certification, or continuing professional education; they merely serve as the framework for ensuring the DLA financial workforce is trained to meet the challenges of the future and are the best qualified as stewards of public funds.

Please ensure all employees, but especially those in the financial management-related management analyst or finance analyst fields, know that this guide has been published and that it can be viewed at the DLA-FO Website at [www.fo.dla.hq.mil](http://www.fo.dla.hq.mil). Questions or comments should be addressed to Barbara Donegan, FOXP, DSN 427-7249 or commercial (703) 767-7249, or by email at [barbara\\_donegan@hq.dla.mil](mailto:barbara_donegan@hq.dla.mil).

LINDA J. FURIGA  
Comptroller

## Identification and Achievement of Core Competencies for Financial Management-related Management Analysts and Financial Specialists

With passage of the Chief Financial Officers (CFO) Act of 1990, the Government Performance and Results Act (GPRA) of 1993 and the Government Management Reform Act (GMRA) of 1994, agencies are increasingly expected to implement improved financial and accounting practices with the goal of producing accurate and complete information on their operations, including auditable financial statements. This type of information is critical for use by managers and policymakers in making difficult decisions as well as measuring agency performance and the full cost of government activities. This information is also key in the preparation and justification of agency budgets, ensuring that they adhere to current legislative requirements and provide the best uses for ever-dwindling DoD resources.

Because of the overall need to improve financial accounting and reporting, DoD personnel are confronted with an enormous financial management improvement challenge. Training is key to bringing DoD financial managers up-to-date and keeping them current on enhanced accounting standards and legislative requirements. A series of audit reports in 1997 and 1998, however, found the DoD lacking in many facets of financial training including basic and advanced college degrees and professional certifications.

The Under Secretary of Defense (Comptroller) felt that the Military Departments and Defense Agencies, based on their unique organizational structures, should update guidance for career management plans, thereby improving the quality of our financial management workforce. The Defense Finance and Accounting Service and the Air Force have already issued guidelines to improve financial management within their respective agencies.

Within the Defense Logistics Agency (DLA), our vision is for all financial managers to be respected professionals shaping processes, systems, and technology to provide the most relevant, accurate, reliable, and timely resource management support and financial services wherever and whenever required for the execution of the DLA mission.

To this end, this document identifies core competencies recommended for employees at various working levels in finance-related jobs within the Agency, and provides a roadmap for how to obtain proficiency in those competencies. This document addresses financial management-related management analysts, as well as the traditional finance specialist or manager, to recognize the move toward integration between the planning, budgeting, analytical and accountability activities of the two disciplines.

Development is ultimately a matter of choosing to accept responsibility for your limitations and for the learning that will be involved in overcoming them. We hope this document will make it easier to identify those areas where development is needed and easier to determine what steps are necessary to make the development materialize.

Overall, these guidelines are not requirements, but merely a “roadmap” for career planning and maintaining proficiency, and are not to be used as a screening device to prevent anyone from applying for a particular position. Excellence of performance on the job remains the key criterion for selection to all positions. However, those employees with desired credentials will have the competitive edge. The guidelines are not intended to supplant current promotion criteria, but they can be considered in assessing candidates for promotion.

The detailed “roadmap” for strategic personal development is provided as attachments to this document. Attachment A reflects core competencies for *entry-level* (level 1, which is typically GS-5 through 7), *mid-level* (level 2, which is typically GS-9 through 12), and *senior non-managerial staff level* (level 3, which is typically supervisory and non-supervisory GS-13 through 15) finance-related management analysts and financial specialists. Attachment B addresses specific steps necessary to identify developmental needs, design a program to satisfy those needs, implement the program, and assess your progress. Attachment C describes specific tools available to achieve proficiency and gives examples of each. Finally, Attachment D provides other sources of information which may be of assistance.

Investment in professional development is an investment in the potential for achieving quality results in all facets of work. More than enabling you to do a job well, professional development contributes to creativity, efficiency, effectiveness, teamwork, and greater judgment that leads to quality in job performance, and quality in leadership. Moreover, it contributes to confidence in doing a job well. You must take responsibility for determining your next steps towards greater opportunity and self-fulfillment professionally so that you can achieve your professional objectives.

These guidelines were developed based on inputs from DLA Headquarters Business Offices and the DLA Comptroller’s and Corporate Administration Offices. Specific questions with respect to your individual training needs should be addressed to your supervisor. Comments on these guidelines are welcome and should be provided to Barbara Donegan, DLA-FOXP, at DSN 427-7249, or by email at [barbara\\_donegan@hq.dla.mil](mailto:barbara_donegan@hq.dla.mil).

**MANAGEMENT ANALYST/FINANCIAL SPECIALIST**

	<b>CORE COMPETENCIES</b> (Knowledge of, Ability to Use, or Skill in Using)	<b>Levels</b>			<b>LEARNING OBJECTIVES</b>	<b>DEVELOPMENTAL ACTIVITIES</b>
		<b>1</b>	<b>2</b>	<b>3</b>		
<b>A.</b>	<b>Basic Government Operations</b>					
1	Basic missions, functions, and organizational structure of the agency and it's offices; and requirements on the agency to include those of the Government Performance and Results Act (GPRA).	X	X	X	Identify the legislative mandates and Administration priorities for the agency.	<u>Courses in:</u> Government Performance and Results Act Authorizing Legislation <u>Work Experience:</u> Rotational assignment to agency planning office, business office, program office planning staff, or Congressional liaison office.
2	The impact that agencies such as OMB, Treasury, GSA and OPM have on agency operations.	X	X	X	Identify the role and responsibilities of central agencies. Discuss approaches for maximizing support for agency mission by working with central agencies.	<u>Courses in:</u> Federal Government Operations Public Administration <u>Work Experience:</u> Details to central agencies Projects working on functions requiring interaction with central agency staff
3	Public laws, executive orders, OMB circulars, bulletins, agency directives, Comptroller General decisions and court opinions governing the agency's management processes.	X	X	X	Review legislative and administrative requirements impacting Federal resources management. Explain the role and impact of the Comptroller General and court opinions on resources management.	<u>Courses in:</u> Appropriations Law Budget Formulation Management Integrity <u>Work Experience:</u> Details through planning, programming, budget and finance offices

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		<b>1</b>	<b>2</b>	<b>3</b>		
<b>B.</b>	<b>Planning, Programming, Budgeting and Accountability</b>					
4	Strategic planning process.		X	X	Explain elements of strategic planning. Identify relationships among strategic planning, programming, budgeting and financial management. Describe requirements of Federal planning.	<u>Courses in:</u> Strategic planning Customer service Creative decision making Leadership <u>Work Experience:</u> Participation in agency strategic planning process Review strategic plans for cross-cutting agencies
5	Basic budget, accounting and programming terminology, concepts, and principles including agency budget principles and procedures and the agency's financial management system.	X	X	X	Explain budget and accounting terminology and application.  Identify agency financial systems and their uses.	<u>Courses in:</u> Government accounting Budget formulation Budget presentation Budget execution Government accounting Standard General Ledger Accounting Standards <u>Work Experience:</u> Rotational assignment within programming, budgeting and finance offices

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		<b>1</b>	<b>2</b>	<b>3</b>		
6	Planning, programming, budgeting and execution system processes, products, terminology, and guidance documents	X	X	X	Identify the steps in preparing Program Objective Memorandum (POM) submission using Defense Planning Guidance (DPG), the agency strategic plan, the agency Performance Contract and POM Preparation Instructions. Understand the difference between TOA and DWCF requirements within the agency.	<u>Courses in:</u> PPBS Federal Budget Process Management and Program Analysis Problem Solving and Decision Making <u>Work Experience:</u> Rotational assignment to agency planning office, business office, or programming office.
7	Structure of appropriations and other funds that support accomplishments of the agency's mission	X	X	X	Identify statutory and regulatory requirements associated with budget execution. Describe funds control and identify internal policies that ensure administrative control of funds. Demonstrate necessary budget functions to accomplish organizational mission within legal parameters. Explain options for maximizing resource in complex operating environment.	<u>Courses in:</u> Federal Budget Process Budget Planning and Formulation Appropriations Law Cash Management Government Accounting <u>Work Experience:</u> Participating in preparation of organizational budget submissions Supporting manager in budget execution
8	The Congressional appropriations and federal budget preparation processes as it applies to the agency.		X	X	Identify the steps in preparing budget narratives and exhibits for inclusion in OMB and Congressional budgets. Outline possible agency responses to potential Congressional reactions to proposed agency budgets.	<u>Courses in:</u> Federal Budget Process Budget Formulation Budget Estimating Techniques Budget Presentation and Justification Congressional Appropriation Process

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		<b>1</b>	<b>2</b>	<b>3</b>		
9	Budget formulation, principles, practices and procedures.	X	X	X	Demonstrate a working knowledge of interrelationships of PPBS processes, products, terminology and guidance. Interpret and apply guidance to produce required budget exhibits. Review, edit and consolidate budget estimates. Explain programs/technical missions/customer requirements.	<u>Courses in:</u> Budget Formulation <u>Work Experience:</u> Rotational/cross training assignment to business office, OUSD (Programming & Budget) office. <u>Other:</u> Attend seminars and workshops in budgeting.
10	Budget presentation, justification and analytical techniques.		X	X	Review and realign estimates and justifications according to priorities. Prepare reclaims/impact statements to budget marks. Prepare analysis of competing alternatives using analytical techniques to compare costs and benefits. Prepare oral and written defense of budget estimates.	<u>Courses in:</u> Budget Presentation and Justification Economic Analysis Program Evaluation Budget Formulation <u>Work Experience:</u> OJT in programming budget presentation and justification.
11	Analysis and data collection concepts and principles.	X	X	X	Obtain information, define problems, identify relationships, evaluate quality, assess impacts and make conclusions/recommendations. Ensure that estimates are reasonable and consistent with past performance and current program objectives. Identify and analyze data in order to related the effects of changes in funding levels. Use automated tools, e.g. spreadsheets, databases and queries.	<u>Courses in:</u> Budget Formulation Management and Program Analysis Statistics Information Resource Management <u>Work Experience:</u> OJT in programming budget presentation and justification. Rotational assignment to Agency business office and operations research office.

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		<b>1</b>	<b>2</b>	<b>3</b>		
12	Budget execution phases, funding documents, allocations and sub-allocations.	X	X	X	Apply the concepts of Anti-Deficiency Act, statutes, appropriations limitations, allotments or project controls to budget execution. Identify appropriate execution documents for specified work or services. Compare funding requests to budget and operating plans. Establish fund control targets and ensure the availability of funds, identify correct funding citations and verify that documents are complete. Explain financial document flow and accounting transactions for budget execution. Apply the elements for managing reimbursable programs and business areas.	<p><u>Courses in:</u> Federal Budget Process Government Accounting PPBS Cash Management Budget Execution Accounting Standards</p> <p><u>Work Experience:</u> Rotational assignment to agency accounting office, business office, budget office, internal review office.</p> <p><u>Other:</u> Attend seminars and workshops in budget execution.</p>
13	Financial systems and reports.	X	X	X	Demonstrate a working knowledge of various financial reports. Explain the stages of accounting, e.g. commitments, obligations, etc. Identify funding alternatives to meet mission objectives. Maintain internal controls consistent with the Federal Managers Financial Integrity Act to ensure funds are properly executed.	<p><u>Courses in:</u> Government Accounting PPBS Information Systems Budget Execution Accounting Standards</p> <p><u>Work Experience:</u> Rotational assignment to agency accounting office, business office, budget office.</p>

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		<b>1</b>	<b>2</b>	<b>3</b>		
<b>C.</b>	<b>General Management</b>					
14	Basic techniques of financial management, economic analysis, contract management and business practices.		X	X	Describe the fundamentals of financial management. Identify techniques of benchmarking, analysis and evaluation.	<u>Courses in:</u> Accounting Controls Business Administration Analytical Techniques Process Reengineering Program Evaluation Fundamentals of Federal Procurement Contract Management Management Integrity <u>Work Experience:</u> Participation on process reinvention team Projects involving in-depth program evaluation Evaluation of internal controls
15	Performance measures, cost accounting and analysis.	X	X	X	Identify principles of and possible application of cost accounting in the Federal government. Review the uses of and possible application of performance measurements, particularly in relation to the GPRA. Demonstrate how performance measurement can be integrated into the budget process.	<u>Courses in:</u> Cost Accounting Information Systems Performance Measures Program Analysis GPRA <u>Work Experience:</u> Detail to Agency office performing cost accounting. Projects involving analysis of cost and/or performance data

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		<b>1</b>	<b>2</b>	<b>3</b>		
16	Generally accepted management principles and practices.	X	X	X	Identify and explain accepted management principles and practices, and organizational development concepts and principles.	<p><u>Courses in:</u> College Management Courses</p> <p><u>Work Experience:</u> Process reengineering team Human resource projects Organizational reviews</p> <p><u>Other:</u> Attend at conferences and workshops relating to management principles</p>
17	Organizational development concepts and organizational analysis techniques, performance effectiveness concepts, productivity measurement and measurements system.		X	X	Discuss principles and applications of organizational assessment, management intervention and change management, management indicators, effectiveness and efficiency measures, and measurement system design techniques.	<p><u>Courses in:</u> Organizational Development Change Management Benchmarking Program Analysis Performance Management</p> <p><u>Work Experience:</u> Rotation to Human Resource Office Participation on performance measure development teams</p>

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		<b>1</b>	<b>2</b>	<b>3</b>		
18	Federal procurement, contract management and grants management.		X	X	Identify and interpret Federal policies regarding procurement, contract management, cooperative agreements and grants.	<u>Courses in:</u> Federal Procurement Grants Contract Management Project Officer's Training <u>Work Experience:</u> Develop Statement of Work (SOW) for contract Rotational assignments
19	Productivity improvement systems and business reengineering processes.		X	X	Identify processes for reviewing and reengineering business practices. Interpret and apply knowledge and design, acquisition process, procedures, terminology and documents, and implementation of productivity improvement systems.	<u>Courses in:</u> Productivity Improvement Benchmarking Process Reengineering Workflow Analysis <u>Work Experience:</u> Reengineering team Rotation to planning office

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		<b>1</b>	<b>2</b>	<b>3</b>		
<b>D.</b>	<b>General</b>					
20	Oral and written communication.	X	X	X	Prepare and present analyses, reports and budget justification to officials. Conduct and participate in effective meetings.	<u>Courses in:</u> Basic Communications Skills Briefing and Presentation Techniques Writing Skills
21	Basic computer applications.	X	X	X	Demonstrate how to use computer application to build databases and present financial data.	<u>Courses in:</u> Basic Computer Use Database Development Software Packages used by Agency (i.e., spreadsheets, graphics, presentation software)
22	Stress and time management techniques	X	X	X	Discuss stress and time management techniques to meet tight deadlines.	<u>Courses in:</u> Stress Management Time Management

### **Core Competencies**

The core competencies in this attachment reflect the knowledge, skills and abilities needed by finance-related management analysts and financial analysts in the areas of basic government operations; planning, programming, budgeting and accountability; general management, and other general areas.

As described in the basic document, the core competencies are desirable at level 1 (entry-level; usually GS-5/7), level 2 (mid-level; usually GS-9/12), and level 3 (senior non-managerial staff; typically GS-13/15) as indicated by the X marks in the appropriate blocks on the attached sheets. The learning objectives associated with the competency represent what the employee should be capable of once a competency is acquired. Finally, the developmental activities listed are representative, but not inclusive, of the types of training and work experience to consider when planning how to develop the competency.

Once again, attaining these core competencies will enhance the professionalism of the Agency, enable accurate, reliable and timely resource management support and financial services, and improve credentials to provide a competitive edge when seeking promotions in financial management-related fields.

## **Step-by-Step Guide**

### ***Step 1: Assessment of developmental needs.***

Review the core competencies in Attachment A that relate to your current position. Make a list of those competencies that you feel you do not currently possess, or those in which you have limited abilities. Do the same for competencies of jobs you may desire.

### ***Step 2: Design a program to satisfy those needs.***

The Individual Development Plan (IDP) should be your primary method of career planning. In this step, take the list you developed in *Step 1* and identify the resources necessary to obtain proficiency in those areas. The IDP process accomplishes the following:

- Focuses on long-term training needs
  - Individual
  - Unit
  - Organization
- Ensures staff training time is relevant
- Provides a process for useful training feedback
- Addresses career development needs

When developing your IDP, the following training resources (tools) should be taken into consideration: general education, technical and professional military education, experience, relevant certification, and continuing professional education. These are discussed in greater detail in Attachment C.

### ***Step 3: Implementing the program.***

Your IDP should be the centerpiece of discussions between you and your supervisor regarding training choices or rotational assignments. Once your IDP is approved, you would complete Standard Form 1556 for specific training classes you wish to attend, or determine timeframes and objectives for potential rotational assignments; ensuring that funding, if necessary, is available. You, together with your supervisor, should also be making arrangements for your normal work to get done while you are away from the job.

### ***Step 4: Assessing your progress.***

On an annual basis, coinciding with the update of your IDP, you should re-address your previously identified limitations and determine if those limitations still exist. Reviewing this self-assessment with your supervisor will help you to communicate your expectations and provide a mechanism for you to request assistance to help you grow personally and

professionally. If you need additional assistance in order to update your IDP, you are encouraged to turn to Employee Development Specialists in your operating training office.

## Available Resources

### *General Education:*

This could also be called “classroom” attained knowledge and refers to just that, courses available independently, or as part of a degree program. The following is a general, but not all-inclusive list of related courses, undergraduate academic disciplines, and specific college courses that are highly desirable for personnel assigned to financial management-related positions:

Accounting	Business Law	Business Management
Economics	Resource Management	Management Systems
Finance	Money & Banking	Computer Science
Statistics	Operations Research	Appropriations Law
PPBS	DWCF Concepts	Budgeting

These classes may be found in several areas. The following represent some, but not all of these locations:

Center for Applied Financial Management	<a href="http://www.fms.treas.gov/center">http://www.fms.treas.gov/center</a>
Government Oriented Training	<a href="http://www.tregistry.com/gov.htm">http://www.tregistry.com/gov.htm</a>
Management Concepts, Inc.	<a href="http://222.MgmtConcepts.com">http://222.MgmtConcepts.com</a>
Graduate School, USDA	<a href="http://www.grad.usda.gov">http://www.grad.usda.gov</a>
Executive Study Program (Training with Industry Program)	<a href="http://www.cah.hq.dla.mil">http://www.cah.hq.dla.mil</a>

For additional availability, please contact your servicing Human Resources or Training office.

### *Technical and Professional Military Education:*

The DoD and Military Services offer Professional Military Education (PME) that is appropriate for all levels of leadership and professional development. Only by understanding the Military Service and DLA mission and how it fits into the overall DoD mission can finance-related managers better advise commanders of their financial responsibilities.

PME is a key element of financial management professional development and should be included in overall IDP career planning, if at all possible. The following are examples of PME and technical education that is available (this is not by any means an all-inclusive list):

Professional Military Comptroller’s School	<a href="http://www.nps.navy.mil">www.nps.navy.mil</a>
National Defense University	<a href="http://www.ndu.edu">www.ndu.edu</a>
Army War College	<a href="http://dde.carlisle.army.mil">dde.carlisle.army.mil</a>
Air War College	<a href="http://www.defenselink.mil">www.defenselink.mil</a>
National War College	<a href="http://www.ndu.edu">www.ndu.edu</a>

To find DLA guidance on the application process for these resources, please visit [www.cah.ha.dla.mil](http://www.cah.ha.dla.mil). Additionally, a good overall site for information on PME and technical education is [www.asmcnline.org/Links.html](http://www.asmcnline.org/Links.html).

### ***Breadth of Experience***

During the last decade the number of DLA personnel has been drastically reduced. With less personnel it is becoming increasingly important to obtain technical expertise in more than one discipline. The financial management community is no exception. Consequently, the core competencies address breadth as well as depth of experience for all personnel in finance-related management analyst and financial specialist positions. To this end, rotational assignments within and outside of DLA can provide invaluable experience. Areas within which to obtain experience could be:

- Budget or financial analysis
- Cost identification and development
- Management analysis
- Accounting (to include non-appropriated fund accounting)
- Auditing
- Planning and Programming
- Resource management

Examples of rotational assignments that may be considered include:

- DLA Major Subordinate Command Functional Areas
- DLA Corporate Business Offices
- DLA Primary Level Field Activities (PLFAs)
- Office of Under Secretary of Defense (Comptroller)
- Office of Management and Budget
- DoD Inspector General

Rotational assignments can last from 30 days to one year or more, depending on the experience you are trying to obtain, the volume of work in your current job, availability of additional resources to help while you are gone, the cost to your agency (if any), and a variety of other factors. This should be discussed with your supervisor and approved through your chain of command prior to making any commitments.

Other areas where experience can be obtained include experience with industry, mentoring, or assignment as team leader or member for special projects, and participation in leadership programs such as the Defense Leadership and Management Program (DLAMP). These options should be discussed with your supervisor to determine which method will best achieve the desired depth and breadth of experience.

More information on the DLAMP program is provided at: [www.cpmns.osd.mil/dlamp/info\\_center.html](http://www.cpmns.osd.mil/dlamp/info_center.html)

## ***Certification***

Some professions within the DLA financial community have well established programs leading to professional certification. Because of increasingly complex and skilled workplace demands, a generally low level of certification compared to the private sector, low public confidence in DoD financial management and the commitment of DoD financial leadership to improve the workforce, DLA financial management-related management analysts and financial specialists are encouraged to obtain a test-based professional certification where relevant certification is available.

Financial certification provides the following benefits to the organization:

- a) Provides an independent verification that financial managers involved in handling public funds have the required knowledge and experience.
- b) Raises the professional stature of the holder and the organization. (Most certifications require agreement to abide by a code of ethics.)
- c) Increases the knowledge in the organization. (Certifications require continuing professional education to stay current in the applicable field.)
- d) Increases the organization's flexibility. (Requires a broad knowledge including management, statistics, information processing and other key subjects.)

Financial certification also provides benefits to the employee. These include improving and broadening an employees' existing knowledge base, increasing opportunities for advancement, and providing higher earnings potential over your total career.

There are many financial certifications in existence today. The following list provides the names of many of these certifications and a Website or phone number you can contact for additional information. These certifications are available to anyone who qualifies, not just to private sector employees.

Certified Public Accountant (CPA)	<a href="http://www.aicpa.org">www.aicpa.org</a>
Certified Management Accountant (CMA)	<a href="http://www.imanet.org">www.imanet.org</a>
Certified in Financial Management (CFM)	<a href="http://www.fma.org">www.fma.org</a>
Certified Internal Auditor (CIA)	<a href="http://www.theiia.org">www.theiia.org</a>
Certified Fraud Examiner (CFE)	(800) 245-3321
Certified Information System Auditor (CISA)	(847) 253-1545
Certified Government Financial Manager (CGFM)	<a href="http://www.agacgfm.org">www.agacgfm.org</a>

The American Society of Military Comptrollers (ASMC), in conjunction with the Under Secretary of Defense (Comptroller) and the Association of Government Accountants (AGA) is developing a Defense-unique certification program. This new certification will be granted as the "Defense Financial Management Certification" (DFMC) and corrects some weaknesses in the area of test-based certification as it pertains to the DoD. The DFMC certification addresses the

unique problems of fiscal law and management with impact on DoD specifically, since the CGFM encompasses state and local financial management issues not relevant to Defense. It also assures DoD top management that certified individuals “know the rules” which affect the administration of the Department’s funds, and it does not require a college degree to sit for the exam. For those individuals who plan a career in the DoD only, and /or are still working to attain a college degree, the DFMC would be a logical choice.

The DFMC should be available in the May/June 2000 timeframe, with a classroom review course to be offered by ASMC sometime in early 2000. You can find additional information and updates on the DFMC at [www.asmc.org/dfmc.html](http://www.asmc.org/dfmc.html).

### ***Continuing Professional Education (CPE)***

The goal for the financial management CPE is to:

- Maintain currency in technical and functional specialties
- Keep abreast of DoD policies and programs
- Stay current on management principles and practices used in the public and private sectors

Personnel will attain CPE for participation in continuous learning activities. We recommend employees attain a minimum of 40 hours of CPE a year. These hours do not have to be in the form of classroom training. Learning can also be attained in the following manner:

- Attendance at a professional association seminar
- Attendance at a professional association luncheon
- Reading professional magazines or periodicals, or specific articles
- Training from WEB-based and CD-ROM sources
- Distance Learning Courses
- Self-Study Education
- Participation in or presentations at professional organizations  
(such as the Professional Development Institute (PDI))
- Publication of books, articles, or course material

To determine how much CPE credit is authorized for a particular course of study, contact your supervisor or operating training advisor.

Employees will be responsible for maintaining their CPE documentation. Documentation can take the form of certificates, college grade slips, and documents signed by supervisors or presenters. CPE education achieved through attendance at luncheon’s, etc., where no specific documentation is available should be self-certified and documented. Correctly documented CPE will have the individual’s name, course title, description, when the instruction (or other) was given, hours of CPE credit authorized, and the instructor or presenter’s name. It is important that you identify in your IDP what has been completed and when. DLA-HQ Comptroller employees can use the FOTrain program that has the capability to sustain a database of completed OJT,

reading of articles, etc. All pertinent education should be assessed in your IDP when monitoring your professional development progress.

**Additional Sources of Information**

1) The JFMIP Core Competencies are available on the Internet for the following positions:

- Accountants
- Budget Analysts
- Financial Managers

at <http://www.financenet.gov/financenet/fed/jfmip/jfmipexp.htm>.

2) The JFMIP Core Competencies are available on the Internet for the following positions:

- Management Analysts
- Financial Specialists
- Financial Systems Analysts
- Information Technology Personnel Implementing Financial Systems

at <http://www.financenet.gov/financenet/fed/jfmip/reports.htm>.

3) You can explore additional training resources by contacting FinanceNet on the Internet at <http://www.financenet.gov>. Once on the FinanceNet page:

- a) Click on “Training” at the left to reach “Government Education and Training”
- b) Scroll down through “Career Development” and “Current Complete Online Courses” to “Course Catalogs”.

4) The United States Department of Agriculture (USDA) is providing enhanced financial management training beginning in January 2000. Since they are using DoD training facilities, allocations are being offered to DoD employees. Additional information may be obtained from your training coordinator or by contacting Mr. Frank Arcari at [arcari@asmconline.org](mailto:arcari@asmconline.org).

5) The Defense Finance and Accounting Service (DFAS) and the Air Force both have developed Financial Management Career Development Plans. Please use the following links to read them or obtain additional information:

Air Force	<a href="http://www.saffm.hq.af.mil">www.saffm.hq.af.mil</a>	Click on “Professional Development”
DFAS	<a href="http://www.dfas.mil">www.dfas.mil</a>	Click on “Careers”

6) Additional information on DLA Workforce development programs and leadership training can be found at: [www.cah.hq.dla.mil](http://www.cah.hq.dla.mil).