



DEFENSE ACQUISITION UNIVERSITY EMPLOYEE SELF-ASSESSMENT

EVM 262 - EVMS Validation and Surveillance

Note:

- Provide a justification(s) package referencing the numbered outcomes as appropriate on separate paper.
- Only the numbered outcomes (bold font) need to be addressed.
- The enablers (indented if specified) are provided to ensure the outcome is sufficiently addressed.
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- Attach this guide with the justification to the DD form 2518 for a complete package.

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Outcomes and Enablers		Achieved?	
		Yes	No
1	The student shall be able to describe the overall EVM-262 course structure and recall the major topics and concepts to covered by the EVM-262 curriculum.		
	The student can record and cite the major topics of the remaining lessons.		
	The student can restate and explain general earned value management (EVM) terminology.		
	The student can identify the differences among standards, policy, and guidelines and if and how each applies to EVM.		
	The student can explain in general terms the difference between compliance, validation, and surveillance.		
	The student can describe the general life cycle of EVM implementation on a typical acquisition.		
2	The student shall be able to describe existing DoD EVM policy, contract pre-award activities, and EVM-related contractual requirements.		
	The student can explain current DoD policy, EVM thresholds, and reporting requirements.		
	The student can describe the pre-award, source selection, and Defense / Federal Acquisition Regulations associated with EVM on DoD Contracts.		
	The student can understand the importance of EVMS requirements (SOW, CDRLs, DFARS, DIDs, Award Fee criteria, etc.).		
3	The student shall be able to describe the specifics of the three options available for EVMS approval.		
	The student can explain government EVMS compliance review.		
	The student can summarize the steps in the EVMS approval process.		
4	The student can explain the EVMS Organization guidelines and interpret each in the context of the EIA 748.		
	The student can outline and explain the Organization Guidelines as listed in EIA 748.		
	The student can categorize the intent, management value, typical EVMS attributes, and typical EVMS outputs for each of the Organization Guidelines.		
	The student can explain the important role Work Breakdown Structures (WBS) play in comprehensive contract work definition.		
	The student can discuss the relationship between a good WBS and an efficient OBS and the effect of the integration of the two.		
	The student can discuss the importance of integrating the various subsystems of the EVMS.		
5	The student can explain the EVMS Planning and Budgeting guidelines and interpret each in the context of the EIA 748.		
	The student can outline and explain the Planning, Scheduling and Budgeting Guidelines as listed in EIA 748.		
	The student can categorize the intent, management value, typical EVMS attributes, and typical EVMS outputs for each of the Planning, Scheduling and Budgeting Guidelines.		
	The student can explain the importance of a properly networked schedule and its' importance to project management.		
	The student can explain the concept of schedule horizontal and vertical integration as well as the importance of the program critical path.		
	The student can summarize the value of establishing and maintaining a PMB at the control account /work package level.		
	The student can explain the concepts of Management Reserve and Undistributed Budget and their use.		
6	The student can explain the EVMS Accounting guidelines and interpret each in the context of the EIA 748.		
	The student can outline and explain the Accounting Considerations Guidelines		
	The student can categorize the intent, management value, typical EVMS attributes, and typical EVMS outputs for each of the Accounting Considerations Guidelines.		
	The student can describe the concept of applied direct costs and the importance of the contractor's accounting system providing auditable actual cost data at the control account level.		
	The student can relate the importance of accurate cost summarization through the CWBS and OBS.		
	The student can explain the various points at which earned value for material items can be calculated and the need for the accounting system to provide actual costs for comparison and analysis, as well as the relative benefits or distortions to performance measurement that may be associated with these points.		
	The student can describe the need for and use of "estimated actuals" when accounting for material costs		
	The student can explain the importance of indirect costs and the attributes required for disciplined application to budgeted and actual costs, and application to individual projects.		
	The student can explain the need to track actual costs by element of cost and unit or lot.		
7	The student can explain the EVMS Analysis and Management Report guidelines & interpret each in the context of the EIA 748.		
	The student can outline and explain the Analysis and Management Reports Guidelines as listed in EIA 748.		



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	The student can categorize the intent, management value, typical EVMS attributes, and typical EVMS outputs for each of the Analysis and Management Reports Guidelines.		
	The student can explain the need for assessing performance in a consistent manner with the planned budget at the control account level.		
	The student can explain the need for analysis methodology and how to interpret "cost and schedule variances" and "at-completion variances."		
	The student can list and explain the various elements of variance analysis that should be prepared by the contractor.		
	The student can demonstrate how the following can be analyzed: 1) material price vs. usage variance, 2) labor rate vs. hours variance, and 3) indirect rate vs. base variance.		
	The student can isolate and separately analyze the impacts of level of effort and indirect costs to either cost or schedule variances.		
	The student can demonstrate how performance data is rolled up to varying levels to meet management needs, explain customer reporting requirements, and describe the need for management corrective action.		
	The student can paraphrase EVMS minimum requirements for formal "Estimates at Completion" (EAC) & the impact that "earned value" techniques have on statistical calculations of FACs.		
	The student can trace the EAC to other reports, such as the Contract Funds Status Report, and describe why realistic EACs are important for funding projections.		
8	The student can explain the EVMS Revision and Data Maintenance Guidelines and interpret each in the context of the EIA 748.		
	The student can outline and explain the Revision and Data Maintenance Guidelines.		
	The student can categorize the intent, management value, required EVMS attributes, and typical EVMS outputs for each of the Revision and Data Maintenance Guidelines.		
	The student can describe the limitations placed on contractors by the guidelines for internal replanning of contractual effort, including retroactive changes.		
	The student can outline the extent of replanning activities required of the contractor when a government change notice is issued.		
	The student can describe the process of establishing an Over-Target Baseline.		
	The student can discuss the contractor requirements for EVMS planning and reporting of an Unfinalized Contract Action.		
9	The student can explain the objectives of EVMS surveillance and discuss the conduct of a surveillance effort at the Defense Contract Management Agency (DCMA).		
	The student can define the purpose and goals for EVMS surveillance		
	The student can identify DoD and DFARS policy regarding the authority and requirement for EVMS surveillance.		
	The student can describe the organizational roles and responsibilities assigned to DCMA, DCAA, PMO, and the supplier (contractor) regarding EVMS surveillance		
10	The student can contrast interview approaches that can be taken in accomplishing validation and surveillance reviews and can adequately prepare for either type of interview.		
	The student can describe the importance of interviews in overall validation and surveillance processes.		
	The student understands how to focus the interview for the assigned process area.		
	The student understands the necessity of preparation for interview.		
	The student can describe operating guidelines, interview techniques, and documentation for the conduct of personnel interviews.		
	The student can demonstrate how to prepare for the interview by organizing materials and selecting sample questions appropriate for the management level of the interviewee		
11	The student can explain the progressive steps that should be taken to deal with EVMS non-compliance situations.		
	The student can outline the progressive steps that should be taken with non-compliance situations (above and below \$100M).		
	The student can understand the individuals who should participate in non-compliance remediation.		
	The student can discuss the differences between withdrawal of EVM System approval versus financial withholds, and discuss the varying impacts to the contractor		
	The student can describe the steps necessary for the remediation actions to be eliminated.		
12	Based on practical experience, the student can explain and apply the activities needed to review and evaluate a contractor's earned value management system in the context of the EIA 748.		
	The student can describe the basic steps in evaluating a contractor's EVMS.		
	The student can analyze the contractor's plan for achieving EVMS approval.		
	The student can interpret the documentation utilized by a contractor in demonstrating his EVMS.		



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	The student can relate EIA 748 to a simulated contractor's EVMS.		
	The student can conduct interviews and data traces to determine if a contractor is compliant with the internal management procedures outlined in the EVMS Description.		
	The student can explain the conduct of an EVMS Compliance Review, and how to resolve issues.		
	The student can summarize the Exit/Debrief requirement and report for the Initial Compliance Review.		