

Report Date: 21 Feb 2014

**Summary Report for Individual Task
805A-36A-8008
Facilitate FM Roles within the Acquisition Review Board Process
Status: Approved**

DISTRIBUTION RESTRICTION: Approved for public release; distribution is unlimited.

DESTRUCTION NOTICE: None

Condition: As the Resource Manager with access to: 1. General office supplies. 2. FM 1-06, Financial Management Operations. 3. Unit mission/goals. 4. Historical cost data. 5. Acquisition Review Board SOP. 6. Theater guidance (i.e., Money As A Weapon System , MAAWS). 7. United States Code (U.S.C) Title 31 - Money and Finance. 8. AR 1-1, Planning, Programming, Budgeting, and Execution System. 9. DFAS-IN REG 37-1, Finance and Accounting Policy Implementation. 10. DoD Financial Management Regulation 7000.14-R, Volume 14, Administrative Control of Funds and Anti-deficiency Act Violations. This task should not be trained in MOPP.

Standard: Facilitate FM roles within the Acquisition Review Board process by receiving and estimating cost requirements, preparing administrative documents, and coordinating funding requirements.

Special Condition: None

Safety Level: Low

MOPP: Never

Task Statements

Cue: None

DANGER
None

WARNING
None

CAUTION
None

Remarks: None

Notes: All required references and technical manuals will be provided by the local Command.

Performance Steps

1. Receive a requirement request from subordinate unit.
 - a. Document receipt of request.
 - b. Distribute request to supporting staff.
2. Estimate cost of requirement.
 - a. Review historical costs and cost drivers.
 - b. Determine estimate based on planned workload and historical cost drivers.
 - c. Verify Independent Government Cost Estimate with market research.
3. Coordinate with units and staff to prepare administrative documents.
 - a. Letter of Justification.
 - b. Independent Government Cost Estimate.
 - c. Performance Work Statement.
 - d. Funding document (i.e., PR&C, MIPR, CC35 etc.).
 - e. Contracting Officer Representative (COR) appointment order.
 - f. COR training certificates.
 - g. Property Book Officer (PBO) memo.
 - h. Legal Review from the Staff Judge Advocate (SJA).
 - i. Quality Assurance Surveillance Plan.
 - j. Any other theater required documentation.
4. Determine validity of requirement through the board voting process.
 - a. Participate in Joint Acquisition Review Board (JARB) meeting.
 - b. Vote to recommend approval or disapproval based on capability vs. needs.
 - c. Strive to achieve least cost solution while taking risks into consideration.
 - d. Present recommendation to approval authority for signature.
5. Coordinate for funding of requirement.
 - a. Place validated requirement on spend plan/budget for funding.

- b. Verify receipt of funds from higher funding authority.
- c. Create funding document in financial system of record.
- d. Upload all documentation into financial system as substantiating documents for audit purposes.
- e. Coordinate with contracting office to ensure funds received to enable obligation.
- f. Follow up with requiring unit to verify receipt of goods.

(Asterisks indicates a leader performance step.)

Evaluation Guidance: Score the Soldier GO if all performance measures are passed (P). Score the Soldier NO GO if any performance measure is failed (F). If the Soldier fails any performance measure, show what was done wrong and how to perform it correctly.

Evaluation Preparation: This task can be evaluated by use of the performance measures as listed. This method of evaluation is appropriate if the Soldier performs the task on the job. Allow the Soldier to practice until the Soldier feels qualified and prepared for the evaluation. Then have the Soldier perform the task, using the materials listed in the CONDITIONS statement above. Score the Soldier "PASS" or "FAIL" as determined by the performance.

PERFORMANCE MEASURES	GO	NO-GO	N/A
1. Received a requirement request from subordinate unit by:			
a. Documenting receipt of request.			
b. Distributing request to supporting staff.			
2. Estimated cost of requirement by:			
a. Reviewing historical costs and cost drivers.			
b. Determining estimate based on planned workload and historical cost drivers.			
c. Verifying IGCE with market research.			
3. Coordinated with units and staff to ensure the following documents are present:			
a. Letter of Justification.			
b. Independent Government Cost Estimate.			
c. Performance Work Statement.			
d. Funding document (i.e., PR&C, MIPR, CC35 etc.).			
e. COR appointment order.			
f. COR training certificates.			
g. PBO memo.			
h. Legal Review from the SJA.			
i. Quality Assurance Surveillance Plan.			
j. Any other theater required documentation.			
4. Determined validity of requirement through the board voting process by:			
a. Participating in JARB meeting.			
b. Voting to recommend approval or disapproval based on capability vs. needs.			
c. Striving to achieve least cost solution while taking risks into consideration.			
d. Presenting recommendation to approval authority for signature.			
5. Coordinated for funding of requirement by:			
a. Placing validated requirement on spend plan/budget for funding.			
b. Verifying receipt of funds from higher funding authority.			
c. Creating funding document in financial system of record.			
d. Uploading all documentation into financial system as substantiating documents for audit purposes.			
e. Coordinating with contracting office to ensure funds received to enable obligation.			
f. Following up with requiring unit to verify receipt of goods.			

Supporting Reference(s):

Step Number	Reference ID	Reference Name	Required	Primary
	AR 1-1	PLANNING, PROGRAMMING, BUDGETING, AND EXECUTION SYSTEM	No	No
	DFAS-IN 37-1	Finance and Accounting Policy Implementation.	No	No
	DODFMR 7000.14-R, VOL 14	Department of Defense Financial Management Regulation, Volume 14, Administrative Control of Funds and Antideficiency Act Violations	No	No

Environment: Environmental protection is not just the law but the right thing to do. It is a continual process and starts with deliberate planning. Always be alert to ways to protect our environment during training and missions. In doing so, you will contribute to the sustainment of our training resources while protecting people and the environment from harmful effects. Refer to FM 3-34.5 Environmental Considerations and GTA 05-08-002 ENVIRONMENTAL-RELATED RISK ASSESSMENT.

Safety: In a training environment, leaders must perform a risk assessment in accordance with FM 5-19, Risk

Management. Leaders will complete a DA Form 7566 COMPOSITE RISK MANAGEMENT WORKSHEET during the planning and completion of each task and sub-task by assessing mission, enemy, terrain and weather, troops and support available-time available and civil considerations, (METT-TC). Note: During MOPP training, leaders must ensure personnel are monitored for potential heat injury. Local policies and procedures must be followed during times of increased heat category in order to avoid heat related injury. Consider the MOPP work/rest cycles and water replacement guidelines IAW FM 3-11.4, Multiservice Tactics, Techniques, and Procedures for Nuclear, Biological, and Chemical (NBC) Protection, FM 3-11.5, Multiservice Tactics, Techniques, and Procedures for Chemical, Biological, Radiological, and Nuclear Decontamination.

Prerequisite Individual Tasks : None

Supporting Individual Tasks :

Task Number	Title	Proponent	Status
805A-36A-8004	Develop a Cost Structure	805A - Financial Management (Individual)	Approved
805A-36A-7003	Manage the Execution of Funds	805A - Financial Management (Individual)	Approved
805A-36A-8007	Conduct Cost Management	805A - Financial Management (Individual)	Approved
805A-36A-6036	Capture Unit Costs	805A - Financial Management (Individual)	Approved

Supported Individual Tasks : None

Supported Collective Tasks : None