



# SAVE International Certification Program Manual

*Guidelines – Policies – Procedures – Examples*

**Fourteenth Edition – Effective April 1, 2017**

This document supersedes all previous documents issued.

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## LIMITATIONS AND CONFIDENTIALITY

All applications and appropriate documentation, once submitted to SAVE International®, become the property of the Certification Board. It has been and will continue to be the policy of the Certification Board not to return any application materials.

If you feel the project information must remain confidential, the information presented may be described in generic terms.

## CERTIFICATION PROGRAM OBJECTIVES

The SAVE International® Board of Directors has authorized a certification program to be administered by a Certification Board with the following objectives:

1. To establish, maintain and administer professional certification programs to promote and support the practice of the Value Methodology globally.
2. To establish and maintain professional development in the Value Methodology by improving professional skills and competence in accordance with established standards.
3. To enforce standards for ethical behavior as established by the SAVE Board of Directors for individuals certified under this program.
4. Support the SAVE Board of Directors to clarify methods and procedures in the application of the Value Methodology; to create better understanding of the value profession; to develop universal acceptance; and, to increase application of value practices.
5. To support the SAVE Board of Directors to encourage the development and application of the Value Methodology, and encourage the successful application of projects in manufacturing, construction, service, government and others.
6. To encourage teaching the Value Methodology in accredited universities and to promote research and development of new VM methods by students and academic advisors.

All questions regarding certification should be directed to the Certification Administration Office at [certification@value-eng.org](mailto:certification@value-eng.org).

## CERTIFICATION PROGRAM TRANSITION

### **Certification Program Transition**

The Certification Board has established a four-year transition plan to a Certification Program with a greater focus on Continuing Education. The program began in June 2016 and should be fully implemented by June 2020. Certification and Recertification requirements will change during the transition period. Changes will be announced through *Value World* and on the SAVE website ([www.value-eng.org](http://www.value-eng.org)).

All existing recertification programs will end August 31, 2017. At that time, Professional Development Units (PDUs) will be required to maintain a certification. Continuing education to maintain certification must be in the Value Methodology Core Competencies or recognized Value Enhancing Methods (VEMs).

### **Previously Paid Fees During Transition**

Maintenance fees for all certifications are paid on an annual basis. During the transition from recertification to annual maintenance, existing certifications paid on a four-year basis will be credited annually until the existing certification expiry date.

## PROFFESIONAL DEVELOPMENT UNITS

The Certification Board is changing from Certification Point (CP) to Professional Development Unit (PDU). Evidence of PDUs must be submitted prior to the anniversary date biennially (every two years).

- VMA Certification began use of the new Continuing Education requirements for PDUs in June 2016.
- Existing AVS Certifications will begin the new Continuing Education requirements for PDUs in June 2017. Conversion of the AVS to VMA after June 2017 will require evidence of PDUs for VMA as part of the transition.
- Existing CVS Certifications will begin the new Continuing Education requirements for PDUs in September 2017. The CVS recertification process ends August 31, 2017.
- New CVS Certification will continue to use CPs through August 31, 2017.

## CERTIFICATION LEVELS

Accompanying the Core Competency transition is a simplification of the existing certifications. Beginning June 2016, the Certification Board will offer only two levels of certification.

1. The first level is **Value Methodology Associate (VMA)**. VMA is a recognition designed for individuals who are new to the Value Methodology field and have received basic Value Methodology training. This entry level certificate is encouraged for those desiring to have on-going involvement in Value Management. If desired, after gaining some experience a VMA may advance to AVS certification, or with more experience to CVS® certification.
2. The second level is **Certified Value Specialist® (CVS®)**. CVS® is the highest level of certification attainable through SAVE International®. Designation is reserved for value specialists who have demonstrated expert level experience and knowledge in the practice of the Value Methodology.

The Certification Board will phase out two existing certifications:

1. The **Associate Value Specialist (AVS)** is no longer offered as a certification by SAVE International®. Individuals with an AVS certification should plan for a transition to the new VMA certification or the CVS® certification when their current AVS certification expires or earlier if desired.
2. The **Value Management Practitioner (VMP)** is no longer offered as a certification by SAVE International®. Individuals with a VMP certification should plan for a transition to the CVS® certification or the VMA certification by June 2018.

## SELECT ADVISOR

All applicants intent on pursuing a certification level (VMA or CVS®) are required to select an advisor. An advisor is any current CVS®. The advisor will:

1. Help the applicant determine which level of certification is appropriate.
2. Actively guide and mentor the applicant through the certification process.
3. Review the submitted application for compliance with the current requirements.
4. Review the submitted application to assist the applicant in determining that the required items are addressed and documented in an organized fashion.
5. Assist CVS® applicants with the selection of topics for their thesis papers.

6. Review the CVS® applicant's paper for subject content and format, and ascertain that the paper offers a new body of knowledge eligible for consideration by the Certification Board.
7. Review and sign the Advisor Checklist form, to be submitted with the completed application.

### **What Is an Advisor?**

An advisor is an individual who is a CVS® in good standing and is knowledgeable of the current certification requirements. Preferably, this should be an individual in your region or someone whom you have known previously. Your advisor will be your primary contact to assist in understanding the necessary requirements. He or she will guide your certification application. It is appropriate in most cases, that your Module I instructor become your advisor, especially for your VMA certification.

### **Source of Advisors**

A listing of current Certified Value Specialists is located on the SAVE International® website. The Certification Administration Office is also available to assist in identifying an advisor.

## **CVS® CERTIFICATION OVERVIEW**

### **CVS Certification Requirements**

To achieve CVS certification, one must:

- Select an advisor who is a Certified Value Specialist®.
- Complete an approved Module I workshop.
- Complete an approved Module II seminar.
  - *The Module II seminar may not be taken sooner than six months after the Module I workshop unless the applicant participates in at least two value studies during the time between the Module I and Module II.*
- Accumulate the required certification points (CPs) for the selected track.
  - **88 Certification Points (CP)** for value specialist.
- Submit an original scholarly paper on a value related subject.
- Submit the application.
- Submit a summary worksheet and supporting documentation.
- Pass Parts I through VII of the certification exam after the Certification Board's approval of the application and paper.

## CERTIFICATION POINTS (CPs)

The certification point (CP) is the system for quantifying the experience and educational requirements for each level of certification. Refer to the description of qualifying categories for the CP to contact hour definition.

- Note that *Category 1 - Practice CPs* may not be accumulated earlier than one year prior to completing the Module I workshop.
- Modules I and II are requirements and do not count as CPs under *Learn VM* category for CVS® certification.



## CHAPTER 2

# CVS - VALUE SPECIALIST

### CERTIFICATION, CVS – VALUE SPECIALIST

#### Category 1 - Practice VM

##### Team Member

Value studies in which you have participated as a *member* of a value study team.

##### Team Leader, Co-facilitator or Facilitator

Value studies in which you have participated as a *team leader or team facilitator*. Typically, the facilitator is not a member of the team, but guides the team through the job plan. The leader is a team member with added responsibilities for conducting the study. These roles can be performed by the same person or two different people.

#### **Certification Point (CP) Requirement: 48 CPs.**

- 480 value study ***team*** contact hours, and a minimum of 12 studies.
- Contact hours may be as a team member, leader, co-facilitator, or facilitator.

**Credit:** 1 certification point (CP) is earned for every 10 ***team*** contact hours in a value study. For any one value study, the maximum certification points allowed is 5.6 and the minimum certification points 2.4. If the value study is less than 2.4 certification points, then the applicant must provide complete documentation to verify a fully completed job plan.

**Submit:** For each value study, provide evidence that clearly demonstrates the use of the Value Methodology:

1. Value study specifics including project title, brief description, dates, time spent on the study, study participants (showing your role). Clearly identify all formal team study time. This information should be submitted on one page.
2. Document the use of function analysis; (e.g., function listing, function cost/worth worksheet, function hierarchy model or FAST diagram.)
3. Document the use of a recognized VM job plan. Submit a copy of the actual agenda used for each workshop claimed, documenting execution of the VM job plan.

4. Evidence of unfettered (unconstrained) creativity.
  - Number of ideas generated.
  - Number of ideas selected for further development.
  - List of target functions/areas.
5. DO NOT submit excess documentation. Two to four pages per study is all that is required providing correct documentation is included. Do not include study proposals, results, and other detail.

## **Category II - Learn VM**

Credit is earned for participating in all formal value learning activities.

**Certification Point (CP) Requirement: 30 CPs.**

### **Value Participation**

**Credit:** 1 CP for every 10 contact hours

- Attending professional society chapter meetings, such as SAVE, IIE, PMI, AACE, etc.
- Attending the SAVE Value Summit or other value related conferences.
- VM related courses: Examples include (but are not limited to) courses on creativity, team building, facilitations skills, cost and costing methods, project management training, function analysis, presentation skills.
- Value related college courses earn 1 CP per credit hour.
- No points are allowed for Module I or Module II courses.

### **Submit:**

1. Dates and locations of meetings, conferences attended, and courses completed.
2. Evidence of attendance (e.g., certificate of completion, including the sponsoring organization and general subject or letter from chapter officer or conference official). Evidence shall include a description of its applicability to the Value Methodology.

### **College Degrees**

*For initial certification ONLY, credit is allowed for one of the following: a two-year Associate degree, a four-year degree (B.A., B.S.); or advanced post-graduate degree (masters or doctorate).*

### **Credit:**

- Four -year degree or an advanced degree: **20 CPs**
- Two-year degree: **5 CPs**

**Submit:**

1. Copy of diploma.

**Professional License or Certification**

Value related professional licenses and certificates acceptable for credit include, but are not limited to:

- Professional Engineer (PE)
- Certified Public Accountant (CPA)
- Registered Professional Architect (RA)
- Certified Purchasing Manager (CPM)
- Certified Manufacturing Engineer (CMfgE)
- Certified Cost Engineer (CCE)
- Certified Quality Engineer (CQE).

**Credit:** Professional license or certification: **5 CPs.**

- Credit is only allowed for the initial certification application.
- Credit will be allowed for active, valid licenses or certifications only.

**Submit:**

- Copy of valid license or certificate
- Evidence shall include a description of its applicability to the Value Methodology.

**Category III - Share VM**

Credit is earned for teaching value, publishing or presenting papers on value, and participating in value society meetings and leadership.

**Certification Point (CP) Requirement: 10 CPs.**

**VM Teaching**

- Credit is allowed for teaching approved Module I and Module II courses.
- Credit is allowed for teaching other Value Methodology courses, unless this is conducted as part of one's normal and expected job responsibilities within one's own organization.
- Credit is allowed for teaching the Value Methodology as a subtopic of another subject.
- Note that only the hours that VM is taught may be counted toward this requirement.

**Credit: 1 CP for every 5 contact hours**

**Submit:**

1. Letter from sponsoring institution verifying teaching.
2. Course description with agenda, content, and time spent teaching.

### **VM Publications and Publicity**

Original papers, essays, books, or book chapters, theses, other media (films, videos, web pages, etc.) **which are published**, relating to the Value Methodology are credited towards certification. Publications within one's own organization do not count.

#### **Credit:**

- **3 CPs** for materials published in peer reviewed journals or publications (e.g. Value World, SAVE conference proceedings, etc.)
- **1 CP** for non-reviewed publications (newspapers, organization newsletters, chapter newsletters, or publications with limited circulation)
- Points will be prorated among authors.

#### **Submit:**

1. Copy of materials
2. Evidence of publication.

### **VM Presentations**

Credit is allowed for speeches or presentations about VM given **outside normal job duties**. Examples include presentations at chapter meetings, conferences, and other public forums. Presentations within one's own organization do not count.

**Credit: 1 CP** per presentation.

#### **Submit:**

- Description of topic discussed
- Length of presentation (30-minute minimum requirement)
- Size and interest of audience
- Signed letter from sponsor indicating date, location, sponsoring organization.

### **VM Society Service**

Participation in a recognized VM society is considered beneficial toward continuous professional development.

#### **Credit:**

1. Value society membership: **1 CP per year**
2. Chapter officer: **4 CPs per year**
3. Chapter president, Miles Value Foundation board member: **8 CPs per year**
4. Certification Board member: **8 CPs per year**
5. Society board member (elected): **10 CPs per year**
6. Society committee member: **4 CPs per year**
7. Certification advisor for VMP/CVS®: **2 CPs per applicant** successfully certified.

**Submit:** A signed statement from an officer or chair, or notification of appointment.

## **RECERTIFICATION, CVS – VALUE SPECIALIST**

The Certification Board will replace CVS Recertification with annual maintenance and biennial Continuing Education requirements of 40 PDUs effective September 1, 2017. Evidence of meeting the biennial PDU requirements must be submitted two years after the end individual's switch to the annual maintenance.

### **Recertification Requirements Summary**

- CVS® certification must be renewed every four years to maintain active status.
- All CPs must be earned during the four-year recertification period. (Early recertification is not allowed.)
- Requires a total of **66 CPs** for value specialists.
- CPs shall be recorded on the certification/recertification summary worksheet and submitted with the application for recertification.
- The applicant is required to attest that he or she has attained the minimum CPs and studies as outlined below with the submission of his or her application.

### **Category 1 – Practice VM**

**Value Specialist Track – 48 CPs**, which consist of 480 value study team contact hours and a minimum of 12 studies. 50% of the hours and studies must be in a role as a team leader/co-facilitator/facilitator.

### **Category 2 – Learn VM**

For Value Specialist Track - **8 CPs**

### **Category 3 - Share VM**

For Value Specialist Track - **10 CPs**

### **Recertification and the Transition Period**

Beginning in September 2017, the Certification Board will discontinue recertification and transition to annual maintenance and Continuing Education to maintain the CVS certification. The transition will end Practice CP requirements. Individuals desiring to maintain their CVS certification will use Continuing Education model to demonstrate growth in knowledge and skills.

As existing CVS certifications expire, individuals will be expected to start fulfilling the Continuing Education requirements. The requirements will include earning and reporting 40 PDUs before the anniversary date in two years. Continuing Education to maintain certification must be in the Value Methodology Core Competencies or recognized Value Enhancing Methods (VEMs). More specifics of the program will be announced in Value World and issued in an updated Certification Manual.

### **LIFE Recertification – CVS® - Terminated**

CVS “Life” status is no longer available as a recertification option.

### **Expired CVS®**

For individuals with a CVS® certification that has expired:

- Within 12 months (grace period) following the certification expiration date, an individual may apply for recertification by submitting proof of compliance with the then current recertification requirements, including having all fees being current, without penalty or special approval;
- In the year after the one-year grace period, an individual who meets current requirements may appeal to the Certification Board for reinstatement.
- After two years, the expired certification may not be renewed. Any time thereafter, if a person desires, he or she may make an application for certification as an VMA, and it will be granted without documentation or testing;
- Or after two years, a person may apply for initial CVS® certification and be approved to take the CVS exam (Parts III, IV, V, VI, VII) provided he or she has attained the then current required number of CPs in each area of experience (performed, learned, and shared). The applicant’s previous Module I, Module II will count towards certification requirements; however, only the applicant’s previous work experience which had not been previously counted towards previous certifications, will be eligible.

### **CVS Retired**

If an individual with CVS certification notifies the Certification Administration Office that he or she is no longer actively engaged in Value Methodology field, then he or she may request to be classified as CVS-Retired. Individuals with the "Retired" designation will no longer engage in fee earning activities related to the Value Methodology. Retired Certified Value Specialists will continue to receive the publications of the certification program. They may reactivate their CVS-Life by notifying the Certification Administration Office.

## CVS PAPER

The purpose of the paper is to enable the Certification Board to judge the applicant's knowledge of the Value Methodology and his or her ability to communicate it effectively and professionally.

The paper is also intended to further the Value Methodology knowledge by making it available to publish in Value World and/or present at the SAVE Value Summit. The paper's topic should focus on a new or original theme rather than a report or a case study. The applicant should be the sole author of the paper.

### Submit:

The final document, including the abstract, must be submitted with your application.

### Requirements:

- A minimum of 2,500 words, maximum of 5,000 (approximately 8 – 15 pages of double-spaced, 10-point text).
- Must include a title page (title of paper, author's name, author's signature, and date of authorship).
- Written in English.
- Use simple 10 point font (i.e.: Times New Roman or Arial).
- Written specifically for the purpose of certification submission and may not be previously presented or published; an exception to use a previously published paper may be granted with prior written approval from the CVS director.
- Written for audiences of value specialists and/or value program managers.
- Topic must be approved by your CVS® advisor.

Evaluation Criterion Category	Grading Considerations	Weight of Importance
Communicate Thesis	Convey Innovation Display Information Visually Stimulate Interest Focus Topics	30%
Demonstrate VM Application	Apply Job Plan Illustrate Function Analysis	30%
Establish Originality		15%
Meet Content Requirements		15%
Facilitate Understanding	Apply Sound Grammar, Punctuation, and Writing Style	10%

## **Content**

It is recommended that the applicant use the research oriented approach for this paper. This approach reports technical information, facts, or ideas current and important to the field. The subject matter may discuss a new discovery or technique or illustrate a change in existing conditions. Ideally, research papers represent a synthesis of your attitudes and ideas, supported by information gathered from other sources. The reader must be given all information required about the subject.

1. Topic – Select a topic of interest, one that is controversial, educational, or new to the Value Methodology. However, in writing on the topic you must convince the evaluators that you are knowledgeable of the Value Methodology without regurgitating the steps of the job plan.
2. Title – Select a provocative title, one that will interest the reader to open the paper and at least read the abstract and introduction.
3. Abstract
  - First page of the paper
  - A condensed version of the paper
  - Generally two or three paragraphs long and should not exceed 300 words
  - Helps the reader review the content in an abbreviated form

*Hints:* The purpose of the abstract is to inform the reader about the content of the paper, its premises and conclusions. Inform the reader what he/she will learn and the approach taken to reach that objective. Some find it easier and helpful to write the abstract after the paper is complete, even if it appears at the front of the paper.

4. Introduction
  - Grabs the reader's attention
  - Notifies the reader of the paper content
  - States the purpose of the project
  - Identifies the hypothesis and background information of theory

*Hints:* The introduction is the opening of the paper. It differs from the abstract by setting the stage, or establishing the foundation upon which you will structure your thoughts.



## 5. Body

- Discusses essential information required to understand your methodology, conclusions, and/or recommendations
- Provides an analysis of the results and conclusions
- Describes procedures for data collection, idea development, observations, etc.
- Free of commercialism
- Correlates previous and future discussion
- Addresses subject significance to the industry

*Hints:* Do not drift too far from the title when writing your paper. Refer back to the title and introduction often to make sure you are still on course. If you drift off the topic, you may create the impression that you are not qualified to address the topic and will lose acceptance points.

Do not write your paper in the first person, i.e., the use of the singular “I,” such as; “I did this” or “I performed...” Use the third person, such as, “The team was led by a facilitator,” rather than “I as their facilitator led the team.”

When writing, select a target audience or person and communicate with that person. Get your thoughts on paper first. Worry about correct grammatical structure later. Do not try to correct each word or sentence as you write, as it will block your creative thoughts.

Outline Your Paper – Organize your paper by dividing it into major topics, subtopics, and examples. A major topic signals a new subject that relates, or supports the theme of your paper. Subtopics are sections within a major topic and examples and points support the sub- and major topics.

For example:

- i) Brainstorming Process Techniques
  - (1) The carousel
  - (2) Freewheeling
    - (a) Using a single facilitator
    - (b) Multiple facilitators
    - (c) Employing scribes

Note the indentations with each level of abstraction.

## 6. Conclusion

- Ties claims made in the introduction
- Reiterates findings, methodology, conclusions, and/or recommendations
- Provides closure

*Hints:* Your concluding section should tie back to your introduction. The conclusion is not a summary, but a close to the arguments and steps you presented in the paper.

## 7. Footnotes or Endnotes

- Indicates references made to published materials
- Identifies all illustrations
- Two common reference citation styles are Modern Language Association (MLA) and American Psychological Association (APA); either is acceptable Bibliography
- Provides explicit acknowledgment of papers, publications, books, referenced throughout the paper.
- Encompasses all materials referenced in the Footnotes or Endnotes.

Hint: acknowledging sources used to craft your paper adds credibility and avoids ethical issues like plagiarism.

Make sure to proofread and review grammatical content.

A useful reference guide is *The Brief English Handbook*, by Edward Dornan and Charles Dawe. This publication was written as a concise guide to grammatical accuracy, effective sentences, correct punctuation, word selection, and sound development of paragraphs, essays, and research papers. Another helpful guide is the Harbrace Writer's Manual.

## **Publication Rights**

Upon receipt, papers become the property of SAVE International®. The Certification Board reserves the right to publish the paper in any SAVE publication (with author credit) and/or recommend that the author present the paper at the annual SAVE Value Summit.

If the submitted paper has been previously published, then author must secure written permission from the owner of the publishing rights for SAVE to republish the paper.

## CHAPTER 8

# VMA - VALUE METHODOLOGY ASSOCIATE

## AVS – ASSOCIATE VALUE SPECIALIST

### AVS Certification

AVS Certification is no longer offered.

### AVS Recertification

AVS Recertification is no longer offered.

As existing AVS certifications expire, individuals with the AVS certification have two options to maintain a SAVE International certification:

- Move to the VMA certification.
- Meet the requirements for the CVS certification.

The Certification Board encourages individuals with the AVS certification to prepare to move to the CVS certification before their AVS certification expires.

## CERTIFICATION, VMA - VALUE METHODOLOGY ASSOCIATE

### VMA Certification Requirements

The Certification Program of SAVE International® recognizes Value Methodology Associate (VMA) as a certification designed for those new to the Value Methodology (VM). Someone with the VMA certification has demonstrated a good understanding of the principles and the basic tools of VM and is able to contribute effectively as a member of a value study team. The VMA certification does not imply any competence to lead a value study.

To achieve VMA certification, one must:

- Complete the 40 hour SAVE International® approved Module I Workshop.
- Submit a VMA Credential application and be approved by the Certification Board to take the VMA Examination.
- Take and pass Parts 1 and 2 of the Certification Examination after approval of application by the Certification Board.

## **MAINTENANCE, VMA - VALUE METHODOLOGY ASSOCIATE**

Continuing Education is required to maintain the VMA certification. Individuals must earn and report 8 professional development units (PDUs) on a biennial basis. Evidence of PDUs must be submitted before the anniversary date every two years, beginning the second year after receiving the VMA certificate. Continuing Education to maintain certification must be in the Value Methodology Core Competencies or recognized Value Enhancing Methods (VEMs). More specifics of the program will be announced in Value World and issued in an updated Certification Manual.

## **CERTIFICATION TRANSITIONS TO/FROM VMA**

### **AVS, VMP or CVS® to VMA**

Current holders of an AVS, VMP or CVS® certification may choose to transition to the VMA certification rather than maintaining an AVS, VMP or CVS® certification.

- Submit a VMA certification application checking box to switch from AVS, VMP or CVS®.
- Submit a copy of your current certification Certificate.
- Submit maintenance fee payment for VMA credential.

Anyone certified as an AVS in 2010 or later who allowed their AVS to lapse due to the recertification requirement may apply for the VMA certification.

- Submit a VMA certification application checking box to switch from AVS.
- Submit a copy of AVS Certificate. Contact the Certification Administration Office if your AVS Certificate is no longer available.
- Submit maintenance fee payment for VMA credential.

There is no training or testing requirement to make the transition from a former or current AVS certificate holder to the VMA certification.

**VMA to CVS®**

Anyone currently holding a VMA certification may transition to the CVS Certification upon meeting the requirements for the certification and passing the required examination parts.

## CHAPTER 9 EXAMINATION

### Examination

The purpose of the examination is to test the applicant's knowledge of the Value Methodology. The examination is broken into seven categories: fundamentals, function analysis, FAST diagramming, team building, certification requirements, financial, and an essay. Refer to the *Examination Reference Chart* below for details.

After an individual's application is approved, the Certification Board will notify the candidate of eligibility to take the examination.

Examinations are offered annually preceding the SAVE Value Summit, provided that the candidate has received approval of his or her application and paper prior to the conference. Candidates wishing to take the examination must contact the Certification Administration Office.

Examinations may also be taken throughout the year, in the presence of a qualified *proctor*. A *proctor* may be an active CVS® (not one's advisor), a full-time faculty member of an accredited college or university, or an individual designated by the Certification Board.

If you choose to take the examination in the presence of a proctor, then you must submit the following information to the Certification Administration Office for approval:

1. Name of proctor and his or her position (if not an active CVS®).
2. Address where the examination should be mailed
3. Proposed date of the examination.

The proctor must affirm to the Certification Administration Office indicating his or her willingness to administer the examination and—if not a CVS®--verifying his or her position with the college or university.

Upon approval, the examination will be mailed to the proctor with instructions for administering the examination.

If the examination is not taken within 30 days of the scheduled date, the unopened examination packet must be returned to the Certification Administration Office. VMA certification exams may be proctored in conjunction with a Module I workshop. The Module I instructor may advertise and proctor the VMA certification exam at the conclusion of an offered workshop.

The instructor/proctor must submit a formal request for exams through the SAVE website. The request must include the proctor's name and CVS® number, scheduled test date, preferred delivery date, list of student names, and physical address for delivery of the exam(s). VMA certification exam requests should be placed at least two weeks in advance of the requested delivery date. Requests received less than two weeks in advance will incur expedited delivery expenses that will be charged to the proctor for reimbursement. Applications, Module I certificate copies, and associated fees may be submitted simultaneously with the completed exams or in advance through online application via the SAVE website.

A score of 70% or above in **each part** must be achieved to pass the examination. If the applicant fails, he or she may retest up to twice without penalty within 12 months of the original examination. After the third failed test for VMA certification, the candidate must submit a new initial VMA certification application, remit the application fee, and provide a copy of the Module I certificate of attendance. The proctor must order the exam from SAVE through the order form on the SAVE website.

VMP and CVS® candidates may retest up to twice within 12 months after the original examination. After two re-examination failures of the certification exam, the candidate must submit evidence of additional training, mentoring, or personal instruction demonstrating improved understanding of the subject.

One re-examination will be allowed at no charge. Each subsequent re-examination will be charged a fee of 50% of the published initial application fees.

After the second failed retest or if the 12-month period has expired, the VMP or CVS® candidate must submit a new initial application package and remit all application fees.

A CVS® candidate who is currently certified as an AVS or VMP is required to take only those sections of the certification exam not previously completed.

*Applicants are **only** required to retake the failed parts.*

## Examination Reference Chart

<i>Examination Parts</i>	<b>VMA</b>	<b>AVS</b>	<b>CVS</b>
<b>Part I Fundamentals</b> 40 Multiple Choice Questions	100 points 30 minutes	No longer Available	100 points 30 minutes
<b>Part II Function Analysis</b> 40 Multiple Choice Questions	100 points 60 minutes		100 points 60 minutes
<b>Part III Work Problem</b> Identify, classify functions and draw a FAST Diagram	Not Applicable		100 points 60 minutes
<b>Part IV Team Building</b> 20 Questions True or false	Not Applicable		100 points 30 minutes
<b>Part V Certification</b> 25 Questions True or False	Not Applicable		100 points 15 minutes
<b>Part VI Financial</b> Identify VM opportunities, first costs, annual costs and break-even point	Not Applicable		100 points 30 minutes
<b>Part VII Essay</b> Choose a topic and prepare an essay demonstrating VM principles.	Not Applicable		100 points 45 minutes
<b>Total Examination Time</b>	1 ½ hours		4 ½ hours



## DEFINITIONS

The following is a list of terms and phrases used in the certification program.

In this document the term *value study* is used extensively. To fully understand the definition of a value study, one should refer to the SAVE International® Value Methodology Standard. No other interpretations of a value study will be allowed.

A value study consists of the following:

- a. Work on an identified value improving, structured, facilitated project
- b. Follows the VM job plan
- c. Perform function analysis
- d. “Pre and post” study contact hours must involve the entire team and be facilitated to count. Formal meetings to prepare for the workshop and formal meetings (not time to implement) after the workshop are eligible only if the entire team is present.
- e. While essential to success, information gathering and proposal implementation activities do not count as study contact hours.
- f. For further details refer to the SAVE International Value Methodology Standard

# CHAPTER 11

## CERTIFIED WORKSHOPS & SEMINARS

### Certified Workshops & Seminars

The first required course for all levels of certification is an approved **Module I workshop**. This course consists of a **minimum** of 20 hours of instruction and 20 hours of live project application. Subject matter includes:

- History, definitions and job plan
- Function, FAST, function-cost
- Creativity
- People-oriented topics
- Cost
- Evaluation and implementation.

The second required course for CVS® certification is the **Module II** (advanced seminar) consisting of a **minimum** of 24 hours. **Module II** attendees should use their Module I knowledge in practice. This practice and experience is essential to a successful Module II.

Subject matter covers:

- Project and team structure
- Job plan
- Function analysis
- Creativity (advanced)
- Financial evaluation
- Interpersonal skills
- Value management.

**NOTE:** The Module II seminar may not be taken in less than six months after completing the Module I workshop unless the individual demonstrates participation in at least two value studies prior to taking the Module II. This allows time to accumulate the necessary value experience.

# CHAPTER 11

## APPLICATION DETAILS

### Application Information

A certification application fee (reference *Certification Requirements Summary Table*) is due upon submission of certification documentation. Fees are applied to the administrative processing of the application, are **not refundable**, and do not guarantee acceptance of the application. Payment of certification program fees should be made to "SAVE International."

**All information pertaining to an application will be considered proprietary and confidential.**

The recommended format for an initial submission for CVS is:

- Application completely filled out with payment of proper application fee
- Certification summary worksheet completed for all CPs claimed
- Tab 1 – Module I and/or Module II certificate
- Tab 2 – Perform VM summary and documentation
- Tab 3 – Learn VM summary and documentation
- Tab 4 – Share VM summary and documentation
- Tab 5 – Paper.

*A properly organized, prepared application takes less time to review.*

Applicants receiving requests for additional information who fail to respond within 30 days will be notified by the Certification Administration Office. Failure to respond will result in the termination of the application.

Certification is an individual recognition and may not be transferred or used to imply that another person, association, education institution, agency, or firm is certified. The use of a CVS® seal with the individual's name and certification number is encouraged on Value Methodology related reports. The CVS® embossing seal may be ordered from SAVE International®.

Although membership in SAVE International® is not required for certification, it is encouraged and credited toward certification and recertification.

Individuals, who allow their certification to expire are not permitted to use the AVS, VMP or CVS® designation. An individual with an expired certification who continues to practice using their certification designation will be remanded to the SAVE International® ethics committee for appropriate action.

## INITIAL CVS SUBMISSION CHECKLIST

*Submission packet includes:*

*Submit your application package online via the SAVE website. All documentation must be in PDF format. Hard copies will not be accepted.*

1. Completed Application: signed and dated by applicant and advisor
2. Certification Matrix & Summary Worksheet: illustrating total CPs claimed
3. Application Fee: *Made payable to: SAVE Certification Program*
4. PDF copy of worksheet and documents
5. PDF copy of Module I certificate
6. PDF copy of Module II certificate (CVS only)
7. Documentation supporting CP's claimed for PRACTICE VM
8. Documentation supporting CP's claimed for LEARN VM
9. Documentation supporting CP's claimed for SHARE VM
10. Scholarly Paper (CVS only)

This checklist is to be used as both an enabler to all VMA and CVS® advisors and to provide a method to improve the quality of CVS® application submittals. As a CVS® advisor, your role is exactly as it states: to advise. Your assistance is important to facilitate the submission process so that the application will not be delayed or, worse yet, declined. Therefore, as an CVS® advisor you should follow the items on this checklist and sign off that you have performed these tasks.

**NOTE: SAVE requires that all initial VMA and CVS® application packages contain this signed statement.**

Review the entire application for the following:

1. Does the candidate meet the VMA or CVS® requirements and identify certification points (CPs) in each category as required for consideration?
2. Is the summary worksheet completed?
3. Has the candidate provided documentation to support the CPs claimed?

4. Is the application, with supporting documentation, organized so that the documentation for all claimed CPs can be easily correlated? A suggestion is to have a section for each of the three categories. Under *VM Performed*, the supporting documentation for each study should be in the same order as the list of studies on the application form. Under *VM Learned* and *VM Shared*, the documentation should be in the same order as the events are listed on the workshop application form.
5. For CVS® applicants, did you read, review, and mentor the scholarly paper for your candidate? Did you review it with the candidate so that that the paper generally meets the CVS® guidelines and requirements for consideration?
6. For CVS® applicants, did you review with the applicant the CVS® exam parts and offer assistance to him or her before he or she will take the exam?

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Advisor's Signature

---

Date

---

Advisor's Name PRINTED

# VM STUDY SUBMISSION SAMPLE PACKET

## General Instructions

Attach the following information for **each** VM study claimed under *Perform VM*. **Do not** submit the entire study report. A summary table of all VM studies is **not** necessary since they will be summarized on the certification summary worksheet submit all of, and only, the following information.

- **Title of Project:**

Highway Guide Rail

- **Brief Project Description:**

The guide rails are installed along highways to prevent accidents. The VM study was to reduce the cost of guardrails without deterioration of performance. An ideal solution would prevent vehicles from re-entering the roadway. Any changes must result in a system that will resist the same forces and not do any greater damage to vehicles.

- **Dates of VM Workshop & Related VM Team Meetings and Time Spent on VM Activity:**

List dates and hours spent on each date.

VM Team Orientation Meeting: December 18, 20XX – 4 hours

VM Study Workshop: January 2-6, 20XX – 40 hours

Post-Workshop Presentation: January 20, 20XX – 2 hours

*Note:* If the entire VM team is not involved, the hours do not count toward *Perform VM* (e.g. individual review of design documents pre-workshop).

- **Project Team Roster:** A roster of participants and their roles.

Name

Discipline

**YOUR NAME HERE**

**YOUR ROLE HERE**

J.J. Tasely

VM Team Leader

J. Q. Applicant

Mechanical Engineer

T. E. Seminski

Structural Engineer

W.A. Massarelli

Highway Engineer

- **Function Analysis:** Submit evidence (one or two pages) of function analysis that is meaningful and specific to the project (e.g. function listing, function cost/worth, functional diagram, function hierarchy model, or FAST diagram).
- **Evidence of Unfettered Creativity:**
- **Agenda for the Workshop:**

## CHAPTER 13

# FREQUENTLY ASKED QUESTIONS

### FREQUENTLY ASKED QUESTIONS

#### **What level of certification applies to me?**

VMA certification recognizes individuals who are new to the field of the Value Methodology and have received basic Value Methodology training. It is an entry level certificate is encouraged for those desiring to have on-going involvement in Value Management, Particularly as team members. If desired, after gaining some experience a VMA may advance to CVS® certification.

AVS certification recognizes individuals with basic value training and minimal experience in the application of the Value Methodology. An AVS is encouraged to progress to CVS® certification. CVS® certification is the highest level of certification available through SAVE International®. This status is reserved for individuals who possess basic and advanced Value Methodology training and significant value study experience. Certified Value Specialists are experts in the Value Methodology and are study members, leaders, facilitators, instructors or VM program managers.

#### **How do I find out where Module I workshops and Module II seminars are offered?**

Approved Module I and Module II courses are offered throughout the year. For a listing of dates, consult the SAVE International website at [www.value-eng.org](http://www.value-eng.org). You may also refer to the SAVE consultant directory to find a qualified instructor to perform this activity at your organization.

#### **Are points accumulated for a VMP transferable towards CVS® certification?**

Yes. You are allowed to transfer all points accumulated for a VMP towards the CVS® program. However, you must be in good standing with the certification program; therefore, you must transfer those points within a four-year certified period.

#### **What happens if I am performing VM and get promoted to a managerial position?**

You may continue to accumulate CPs to qualify.



### **What is an advisor?**

An advisor is an individual who is a Certified Value Specialist® in good standing and is knowledgeable of the current certification requirements. Preferably, this should be an individual in your region or someone whom you have known previously. Your advisor will be your primary contact to verify that you have completed all of the necessary requirements, and will authorize your certification submission. Make sure the advisor you select is up to date with current certification requirements. It is appropriate in most cases, that your Module I instructor becomes your advisor, especially at the VMA level.

### **How long does the approval process take?**

Providing that all documentation for CVS® certification has been presented, the average time from submission to approval is approximately two months. This time is required to afford the CVS® committee time to objectively review your application. VMA applications and exams are usually processed in less than one week.

Payment of the appropriate application fee is mandatory. The Certification Board will not review any unpaid application.

### **How can I speed up the process?**

- Make sure that your submission is organized in the recommended submittal format. Submit all documentation in PDF format. Hard copy applications will be rejected.
- Clearly identify all points claimed in each category using the certification summary worksheet
- Insure that your documentation matches the claimed CPs
- Create a tab for each category
- For each category list the points claimed followed by appropriate documentation.
- Include all necessary materials in each tab. A checklist for each level of certification is included in this manual
- Finally, supporting documentation of studies completed is the primary culprit of delaying the approval process. An example of a study submission has been provided. The evaluation of function is what identifies the Value Methodology. Information submitted must clearly illustrate the use of function analysis
- More than four pages per study is normally excessive and will slow down the evaluation process
- Excessive documentation may result in your application being rejected.

### **How will I find out about problems with my application?**

You will be notified, and your advisor will be copied, on any significant concerns. If your application is rejected, you may contact the Certification Board and request an appeal hearing.

### **How do I prepare for the examination?**

After the Certification Board has approved your application, you will be notified that you may take the examination. It is recommended that you review the Examination Study Guide, which can be downloaded from the SAVE website. Review of the Value Methodology Standard and the function monographs on the SAVE website will be extremely helpful. Your advisor should help you prepare for the exam and recommend books.

### **Where and when can I take the examination?**

Certification examination is offered annually at the SAVE Value Summit. Individuals wanting to take the examination at that time must receive authorization of approval from the Certification Board prior to the conference. Approved candidates may also take the examination any time throughout the year under the direct supervision of a qualified proctor. Additional information regarding proctors can be found in the section titled: Examination.

### **How can I tell when my certification expires?**

Perhaps your certification number is 201403519. The first four characters (2014) represent the year of initial certification. The next two characters indicate the month (03). The last three characters indicate the level and sequence of certification. Therefore, your expiration date is March 31, 2016, and every four years thereafter. You may apply for life certification (VMP and CVS only) as part of your third recertification.

You should receive a courtesy letter SAVE approximately three months your certification expires and again one month before expiration. In addition, if there is no response forthcoming, a final warning will be sent. If there is no response to the final warning within 30 days, your certification status will be changed to "expired". If SAVE does not have your current mailing address and/or you do not receive this letter, then you are not excused from the recertification process or exempt from the penalties for failure to submit an application. Remember, it is your responsibility to keep your certification current. Continuing to use certification designation once expired is a breach of ethical conduct and will be referred to the SAVE International® ethics committee.

### **What should I do to prepare for recertification?**

The best way to minimize the anxiety of recertification is to begin to collect documentation from the time your certification or recertification is approved. A set of recertification file folders, one for each category, will afford you a place to accumulate the documents you will need for recertification. Annually, review your accumulated documents and prepare annual recertification worksheets. As the time approaches for recertification, it should be a simple matter to compile the annual worksheets into the application. Only submit a completed worksheet. The Certification Board may request that you provide documentation for any claimed CPs. "Be prepared!"

**When should I use my CVS seal?**

CVS are encouraged to use their seal on formal documents. It is hoped the use of the seal will heighten the professional image of all value managers.

**How may I pay my fees for either certification or for an examination?**

SAVE International has online application and payment available. Simply follow the hyperlink: **<http://www.value-eng.org/page/Certification>**. On that web page, click on either CVS or VMA certification then scroll down to the Application section. Please fill out the requested information and the payment information and submit the form. SAVE administrative staff will receive the information to begin the certification process and process the credit card payment.

**I still have questions, whom should I contact?**

Contact the SAVE Certification Administration Office at [certification@value-eng.org](mailto:certification@value-eng.org).

# CHAPTER 14

## PVM TO CVS REQUIREMENTS

### PVM to CVS Requirements

A collaborative agreement exists between SAVE International® and the National Value Associations of Europe, represented by the European Governing Board (EGB) to protect basic value concepts developed from the principles established by L. D. Miles, and to build on these by sharing knowledge and experience. The following describes the requirements of a qualified PVM (Professional in Value Management) submitting an application to become recognized as a Certified Value Specialist® (CVS®):

1. **A valid PVM Certificate:** The duration of CVS® certification shall be four years from the date of approval. Once certification is achieved, the candidate shall apply for recertification through the SAVE International® Certification Board and follow the Board's rules for recertification.
2. **Endorsement:** A member of the EGB (European Governing Board) or, by delegation, the chairperson of the NCO (National Certification Organization) of the country of the applicant shall submit an endorsement of the applicant. To overcome the question of validating the applicant's information, we must trust in the professional discretion of the candidate and the endorser for that candidate. However, this does not preclude the right of the SAVE Certification Board to spot audit any information presented in the application.
3. **CVS® Advisor:** This is optional, but recommended. The CVS® advisor will review the full application for completeness and represent the candidate to the SAVE Certification Board regarding any questions that may arise during processing.
4. **A completed and SAVE Certification Board approved professional experience log:** All assignments logged must be those that follow the basic VM job plan phases that include: information, function analysis, creative, evaluation, development and presentation. The outcome of the VM events has no weight as a substitute for not using accepted Value Methodology principles and practices.
  - **Date:** This is the beginning date of each value study assignment. Earliest assignment date shall be four years (or less) from the date of the application.
  - **Client Company:** This is the name of the client for whom the applicant performed the value study assignment.

- **VE Project Description:** State the nature, title, or a short description of the value study assignment.
  - **Total Event Hours:** State the total elapsed time of the value study assignment.
  - **Total Contact Hours:** State the number of hours that the full value study team was engaged in performing the value study assignment. This excludes any planning activities, or pre-event meetings that do not include the full value study team.
  - **Total number of hours required: 48 CPs – 480 Hours – Minimum 12 studies.**
  - **Total Facilitator Hours:** State the total number of hours that the applicant served as lead or co-facilitator for that project.
  - **Total number of hours required: 48 CPs – 480 Hours.**
  - **Notes:** Add any notes that would assist the CVS® evaluators in understanding compliance with application requirements.
  - **FAST Models:** A minimum of two FAST diagrams created for the above assignments in which the applicant was the lead, or co-facilitator. The FAST diagrams can reflect the classic, technical, or customer FAST techniques.
  - **Note:** Function tree may be accepted as a variation of the customer FAST if it clearly shows a function hierarchy and is consistent with the SAVE International® Value Methodology Standard.
5. **Biography, or Résumé:** Include a short (1 to 1½ pages) description of the applicant’s professional history. This should include academic accreditation, other certifications, publications, honors, and awards.
  6. **Additional Requirements:** Include a statement by the applicant that he or she has read the SAVE International® Value Methodology Standard and understands the differences between that standard and the European standard.
  7. **Application Fee:** The fee shall be as prescribed in the current fee structure for “CVS®” applicant.”

Please visit the SAVE International website at <http://www.value-eng.org> to...

- Find information about joining SAVE International®
  - View/download this manual
  - Search a current listing of certified individuals
- Find out how to contact the Certification Administration Office

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