SAVE International®
Certification Program Manual

Policies – Procedures – Guidelines – Examples

15th Edition – Effective May 1, 2018
This document supersedes all previous documents issued.

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SECTION 1 - GENERAL REQUIREMENTS

LIMITATIONS AND CONFIDENTIALITY

All applications and appropriate documentation, once submitted to SAVE International®, become the property of the SAVE Certification Board. It has been and will continue to be the policy of the SAVE 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.

The SAVE Certification Board continues to reserve the right to change, amend, add or eliminate any requirement for any certification it issues past and present.

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 Value Methodology methods by students and academic advisors.

All questions regarding certification should be directed to the SAVE business office at certification@value-eng.org.
CERTIFICATION PROGRAM TRANSITION

Transition Plan

The SAVE 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).

All existing recertification programs ended 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).

Core Competencies Transition

This is the guideline by which the Value Methodology is layered to build VAVE competency. These are the minimum disciplines required for each certification level.

The Value Methodology AssociateSM (VMA™) level is the introduction to the Value Methodology. This level of competency is for VAVE team members and should provide a solid understanding to contribute to a value study.

The Certified Value Specialist® (CVS®) core competencies contain a broader range of skills necessary to plan, organize, lead and bring results to a VAVE study. It is required that a CVS® conduct a Value Methodology Fundamentals 1 (VMF 1) course for VMA™ certification and lead all studies for CVS® initial certification application. The CVS® is the only one qualified and approved by SAVE standards to facilitate a value study. The VMA™ can assist the CVS® in charge, but is not by core competencies definition qualified to lead VAVE studies.

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.

The Associate Value Specialist (AVS) certification is discontinued and no longer offered. Current AVSs are encouraged to transition to VMA™ or CVS®.
Evidence of Professional Development Units (PDUs) must be submitted prior to the anniversary date biennially (every two years).

- VMA\textsuperscript{SM} maintenance began requiring use of the new Continuing Education requirements of one SAVE e-learning course per year in June 2017. PDUs are not required.
- Existing CVS\textsuperscript{®} certification maintenance will begin the new Continuing Education requirements for PDUs in September 2017. The CVS\textsuperscript{®} recertification process ends August 31, 2017. New CVS\textsuperscript{®} certification will continue to use Certification Points (CPs).

## CERTIFICATION LEVELS

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

1. The first level is the **Value Methodology Associate (VMA\textsuperscript{SM})**. VMA\textsuperscript{SM} is a recognition designed for individuals who are new to the Value Methodology field and have received basic Value Methodology training. This entry level certification is encouraged for those desiring to have ongoing involvement in Value Management. If desired, after gaining some experience, a VMA\textsuperscript{SM} may advance to CVS\textsuperscript{®} certification.

2. The second level is the **Certified Value Specialist\textsuperscript{®} (CVS\textsuperscript{®})**. CVS\textsuperscript{®} is the highest level of certification attainable through the SAVE Certification Program. Designation is reserved for value specialists who have demonstrated expert level experience and knowledge in the practice of the Value Methodology.

## SELECT AN ADVISOR

All applicants intending on pursuing a certification (VMA\textsuperscript{SM} or CVS\textsuperscript{®}) are required to select an advisor. An advisor is any current CVS\textsuperscript{®} in good standing. 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. Review the CVS\textsuperscript{®} applicant’s paper for subject content and format, and ascertain that the paper meets the new requirement and is eligible for consideration by the SAVE Certification Board.
6. 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 Value Methodology Fundamentals 1 (VMF 1) course instructor become your advisor, especially for your VMA®SM certification.

Source of Advisors

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

VMA®SM CERTIFICATION OVERVIEW

VMA®SM Certification Requirements

To achieve VMA®SM certification, one must:

- Select an advisor who is a Certified Value Specialist® in good standing
- Complete an approved Value Methodology Fundamentals 1 (VMF 1) course
- Submit and pay the required application and fee
- Successfully pass the VMA®SM exam

CVS® CERTIFICATION OVERVIEW

CVS® Certification Requirements

To achieve CVS® certification, one must:

- Select an advisor who is a Certified Value Specialist® in good standing
- Complete an approved Value Methodology Fundamentals 1 (VMF 1) course
- Complete an approved Value Methodology Fundamentals 2 (VMF 2) course
  - The VMF 2 course may not be taken sooner than six months after the VMF 1 course
- Accumulate the required certification points (CPs)
- Submit an original paper on the prescribed value related subject
- Submit and pay the required application and fee
- Submit a summary worksheet and supporting documentation
- Pass the CVS® exam after the SAVE Certification Board’s approval of the application and paper
The Certification Points (CPs) is the system for quantifying the experience and educational requirements for CVS® certification. Refer to the description of qualifying categories for the CPs to contact hour definition.

- Note that Category 1 - Practice CPs may not be accumulated earlier than one year prior to completing the VMF 1 course.
- VMF 1 and VMF 2 courses are requirements and do not count as CPs under the Learn VM category for CVS® certification.

### EDUCATION RESOURCES

#### Courses

**Value Methodology Fundamentals 1 (VMF 1)** is a 32-hour course delivered by SAVE authorized instructors containing lecture, discussion, practice and review to deliver the core competencies aligning with basic value understanding. This course can be combined with real or case workshop activity which may require additional time beyond 32 hours to complete.

**Value Methodology Fundamentals 2 (VMF 2)** is a 32-hour course delivered by SAVE authorized instructors containing lecture, discussion, practice and review to deliver the core competencies aligning with more advanced value understanding associated with the delivery of value workshops.

Both courses are available through SAVE approved licensed instructors. A list of approved instructors can be found on the SAVE website.

#### Literature

The **SAVE International® Value Methodology Glossary** is strongly recommended as an examination study resource and provides useful information on a wide range of VM concepts. It is available for free download on the SAVE website.

The **SAVE International® Function Analysis Guide** is the definitive resource for the Function Analysis Core Competency. It is available for purchase on the SAVE website. It is also available for free download to all SAVE members on the SAVE e-learning portal.

SECTION 2 - CVS® INITIAL CERTIFICATION

PRACTICE VM

The applicant must participate in a minimum of six (6) value studies and accumulate a minimum of 240 contact hours.

Certification Point (CP) Requirement: 24

- 240 value study team contact hours and a minimum of six (6) studies.
- Contact hours may be as a team member or co-facilitator under the direct supervision of the CVS® team leader.

Credit: One CP is earned for every 10 team contact hours in a value study. For any one value study, the maximum CPs allowed is 5.6 and the minimum CPs is 2.4. Remote or electronic participation is not allowed or recognized for initial certification.

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.

EXPERIENCE VM

From the value studies submitted by the applicant under Practice VM, the applicant must select six (6) that become their “focus studies.”

Facilitation Requirements:

- From within any three of the six focus studies, the applicant must facilitate the value team through a complete Job Plan Phase for Function Analysis, Creativity and Evaluation.
  - The applicant must lead each session without assistance of the CVS® team leader for the value study.
  - Only one session may be claimed in any one value study.
  - The leadership sessions can be accomplished in any order.
Facilitation Submittals:

- From each of the three leadership sessions, submit a letter signed by the CVS® Team Leader certifying your leadership of the Job Plan Phase. The letter must include the experience date, value study title and which Job Plan Phase was led by the applicant.
- A copy of the work produced during the leadership session.
- For each of the three leadership sessions, submit a summary of your experience, a minimum of one page and a maximum of three pages, addressing at a minimum:
  - Obstacles you encountered in facilitating the session.
  - Solutions you used to overcome these obstacles.
  - Lessons learned during facilitation of the session.
  - How this experience will change your approach in future facilitation sessions.

CVS® PAPER

Using the experiences from the six focus studies identified in Experience VM, the applicant is to write a paper that addresses in detail:

“How function analysis enabled the value teams to provide better value by identifying creative alternates occurring in the six (6) focus value studies.”

The purpose of the CVS® paper is to enable the SAVE Certification Board to judge the applicant’s understanding of the importance and benefits of Function Analysis as a foundation for innovation, and his or her ability to communicate it effectively and professionally.

CVS Paper Evaluation Criteria

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<th>Evaluation Criterion Category</th>
<th>Evaluation Considerations</th>
<th>Weight of Importance</th>
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<tr>
<td>Convey Function Analysis Benefits</td>
<td>Demonstrate Improved Value, Demonstrate Innovation, Link Results of Creativity to Strong Functions</td>
<td>40%</td>
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<tr>
<td>Convey Interest in the Featured Project / Product / Process</td>
<td>Convey Goals of Project / Product / Process in a Compelling Way</td>
<td>30%</td>
</tr>
<tr>
<td>Enhance Understanding</td>
<td>Use Sound Grammar, Punctuation and Writing Style</td>
<td>15%</td>
</tr>
<tr>
<td>Meet Content Requirements</td>
<td>Follow Requested Structure and Address All Requested Information</td>
<td>15%</td>
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General Requirements

- A minimum of 2,500 words, maximum of 5,000 (approximately 8-15 pages).
- Written in English.
- Uses 10-point Arial font, double-spaced.
- Written specifically for the CVS® application and not previously presented or published.
**Structure and Content Requirements**

The following structure of the CVS® paper shall be followed, in the following order. Although the section titles are recommended for inclusion in the paper, especially for the body, section numbering is provided only as a guideline for the applicant – the applicant’s paper is not required to include section numbering.

1. **(Title Page)**. Include title of paper, applicant’s name, applicant’s signature and date of authorship).

2. **Introduction**
   Generally acceptable 300-500 words.
   Helps reader preview the content in abbreviated form.
   *Hint:* It may be easier to write the body of the paper before writing the introduction.
   a. **Introduction.** Set the stage, by informing the reader of the paper content.
   b. **Thesis.** State hypothesis and basis of theory. State overall how using function analysis on the six focus studies benefitted those types of projects, products and/or processes.

3. **(Body) Improving Value Through Function Analysis**
   Discusses essential information required to understand conclusions and/or recommendations.
   Provides an analysis of the results and conclusions for each.
   Describes procedures for data collection, idea development, observations, etc.
   Free of commercialism.
   *Hint:* Write the body as a statement of facts, rather than a chronology of what the applicant did written in the first person (i.e., “Prioritized functions were used in the Creative Phase to...” rather than “I facilitated the Creative Phase to brainstorm...”).
   For each of the six focus studies, include the following:
   a. **(Project/Product/Process Title)**
      i. **Need and Purpose.** Include facts about the need and/or problem the project/product/process is intended to address and purpose and/or goals of the project/product/process.
      ii. **Function Analysis Tool.** State which function analysis tool was used and why that tool was selected (e.g., Random Function Identification and Classification, Function-Resource Matrix, function cost/worth worksheet, FAST diagram, or function hierarchy model). Describe how it enhanced Function Analysis. (Do not provide the work product here, as it is required in the Practice Submittal, B.2. Function Analysis.)
      iii. **Function Prioritization.** Name the functions that were prioritized for use in the Creativity Phase and the criteria used for prioritization.
      iv. **Featured Functions.** Select and name two of the prioritized functions to feature that aided creativity, resulting in alternatives that were recommended by the value team.
      v. **Creativity.** Demonstrate how each of the two featured functions broadened the value team’s creativity—generating innovative ideas on alternative ways to perform functions that *improved value*, rather than limiting creative ideas to alternative components or process steps within a specific project/product/process, or options for scope and/or cost reduction.
Note: Value is an expression of the relationship between function and resources where function is measured by the reliable performance of the functional requirements of the customer, and resources are measured in the cost, time, energy, space, materials, labor, etc. required to accomplish the function. This relationship can be expressed by the following equation: Value ≈ Performance ÷ Resources.

vi. Example Alternatives/Recommendations. Describe one alternative the team recommended for each featured function, including the specifics of the idea and how it improved value.

4. Conclusion
   Generally acceptable 300-500 words.
   Reiterates findings, methodology, conclusions and/or recommendations that address the thesis in the introduction.

PUBLICATION RIGHTS

Upon submittal of the CVS® paper to the SAVE Certification Board, the applicant grants SAVE International® 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. Ownership of the paper and the intellectual property therein will remain the property of the applicant.

LEARN VM

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

Certification Point (CP) Requirement: 30

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 the VMF 1 and VMF 2 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 only one of the following:
- A four-year degree (B.A., B.S.) or advanced post-graduate degree (masters or doctorate).
- A two-year Associate degree.

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

Submit:
1. Copy of diploma.

Professional License or Certification

For initial certification, credit is allowed for only one of the following:

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)
- 6 – Sigma Black Belt
- Certified Lean Black Belt

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.

Program Management

Credit
For value program managers and project managers who are employed within a value program only: **2 CPs** will be credited per year for full-time employment in a value program within an organization, with a maximum of **6 CPs**. Credit will not be given for employment within an organization, or consultant that provides value consulting for clients outside its own organization.
Program Management Submittal
A. Value Program Attestation. A letter signed by the applicant’s supervisor on the employer organization’s letterhead
   1. stating he or she is the supervisor of the applicant,
   2. attesting to the applicant’s role in the organization, and
   3. the full-time equivalent (FTE) of value program management or participation for each year claimed. For example, if the applicant’s job responsibilities are divided such that 50% of his or her time is spent on activities directly related to a value program during a given year, they would earn 0.5 FTEs for that year, equivalent to 1 CP.

FACILITATION TRAINING

Each applicant is required to complete a minimum of 24 hours training in group Facilitation Skills. This may be achieved by attending classes, online courses or e-learning.

Submit: a copy of the course completion documentation. The documentation must clearly show the title of the course, the instructional certifications, duration of the course.

SHARE VM

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

Certification Point (CP) Requirement: 10 CPs

VM Publications & 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 Value Summit 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 presentations or speeches that specifically relate to the Value Methodology. Examples include presentations at chapter meetings, conferences and other public forums. Presentations inside and outside one’s employment organization will be given credit. *(1 CP per presentation, a minimum of 30 minutes in duration.)*

**VM Presentations Submittal**
1. **Presentation Information.** For each presentation or speech, submit the following.
   a. **Description.** A description of topic discussed.
   b. **Duration.** The duration of presentation.
   c. **Audience.** The audience type(s) (e.g., executives, project managers, etc.) and number of attendees.
2. **Attestation Letter.** A signed letter from the sponsor on sponsoring organization letterhead attesting that the applicant presented, including the date, location and presentation topic.

**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 VMA℠/CVS®: **2 CPs per applicant** successfully certified

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

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**SECTION 3 - CVS® – MAINTENANCE**

The SAVE Certification Board will replace CVS® recertification with annual maintenance and biennial Continuing Education requirements of 40 PDUs effective September 1, 2017. Affidavit of meeting the biennial PDU requirements must be submitted two years after the end of the individual’s switch to the annual maintenance.
MAINTENANCE REQUIREMENTS SUMMARY

- CVS® certification must be maintained every two years to retain active status.
- CVS maintenance fees must be paid annually to retain active status.
- All PDUs must be earned during the two-year maintenance period. (Early maintenance is not allowed.)
- PDUs shall be recorded on the “SAVE International Ledger of PDU Credits”.
- The applicant is required to attest that he or she has attained the minimum PDUs as outlined below with the submission of his or her CVS® renewal.

Professional development will be reflected in continuing education, and SAVE membership and service. Professional development units (PDUs) will measure this.

During a two-year PDU accrual interval:

- a minimum of 70% of total PDUs may be claimed for continuing education, and
- a maximum of 30% of total PDUs may be claimed for SAVE membership and service.

PROFESSIONAL DEVELOPMENT UNITS

**Qualifying Continuing Education PDUs**

One Professional Development Unit (PDU) is credited for each class, course or conference session, including the following:

- Value Summit participation (2017 or later), including
  - attending pre-Summit classes
  - attending Summit sessions
  - acting as a moderator or instructor.
- E-Learning courses via the SAVE e-learning portal
- SAVE approved courses
- Other technical courses that directly meet specific learning objectives within the Core Competencies
- SAVE Chapter meeting presentations

**Continuing Education PDU Requirements & Limitations**

- A minimum of 1 PDU is required in Core Competency #3—Team Facilitation
- A minimum of 1 PDU is required in Core Competency #4—Function Analysis
- A maximum of 10 PDUs may be claimed within any one of the nine Core Competencies
- A maximum of 2 PDUs may be claimed for technical courses that relate to any of the Core Competencies, but do not directly meet the learning objectives within a given Core Competency
Qualifying Value Society & Service PDUs

SAVE membership and service PDUs are measured based on the support of the value profession, allocated as follows:

- Value Society Officer: 8 PDUs per year
- Value Society Officer (Chapter): 4 PDUs per year
- Value Society Committee Member: 4 PDUs per year
- Local Chapter Meeting Attendance: 1 PDU per meeting
- Presentations: 1 PDU per presentation
- VMF 1 and VMF 2 Instruction: 2 PDUs per year
- Summit Forum Moderator: 1 PDU per year
- Value Society Membership: 1 PDU per year
- Mentorship: 1 PDU per year

MAINTENANCE PROGRAM SCHEDULE OVERVIEW

All persons holding either a VMA\textsuperscript{SM} or CVS\textsuperscript{®} certification must pay annual maintenance fees and accrue the required number of PDUs for their level of certification. The first certification maintenance period will be for one year. The month in which one’s VMA\textsuperscript{SM} or CVS\textsuperscript{®} certification was originally issued is now called one’s anniversary month. This means that all VMA\textsuperscript{SM}s and CVS\textsuperscript{®}s will start their respective maintenance cycles within the next 12 months.

First Maintenance Period: One Year

Beginning with one’s anniversary month, the VMA\textsuperscript{SM} or CVS\textsuperscript{®} will receive an invoice from SAVE for one year of fees. At this time, the VMA\textsuperscript{SM} or CVS\textsuperscript{®} will pay the fee and now has 12 months to accrue required PDUs.

- For the first year, VMA\textsuperscript{SM}s are required to take one SAVE e-learning course.
- For the first year, CVS\textsuperscript{®}s are required to accrue 20 PDUs.

Note: To aid VMA\textsuperscript{SM}s and CVS\textsuperscript{®}s in transitioning to the new certification maintenance program, the PDU accrual interval for the first one-year maintenance period will be two years—retroactive to one year prior to one’s anniversary month.

Second Maintenance Period & Thereafter: Two Years

At the end of the first maintenance period (one year), the VMA\textsuperscript{SM} or CVS\textsuperscript{®} will receive an invoice for two years of maintenance fees from SAVE, together with an affidavit form to attest that he or she has completed the required PDUs during the previous maintenance period. The VMA\textsuperscript{SM} or CVS\textsuperscript{®} will complete the affidavit and submit it together with the required maintenance fees.
**Proration of Fees**

For those who have previously paid fees for the old four-year certification cycle, their fees will be prorated to the new renewal cycle. For example, if a VMA℠ or CVS® was certified or recertified in January 2016, their first anniversary under the new program would be January 2018. At that time, they would still have two years’ worth of previously paid fees that would apply to the new maintenance period.

**Two-Year Renewal Cycle & PDU Accrual Interval**

The two-year maintenance period and PDU accrual interval will repeat and continue for all VMA℠s and CVS®s for as long as they are good standing with SAVE or one’s Affiliate organization is maintained.

- Within each two-year maintenance period, VMA℠s are required to take two SAVE e-learning courses.
- Within each two-year maintenance period, CVS®s are required to accumulate 40 PDUs.

The schedule below shows these milestone dates:
Certification Maintenance Example

The following is an example for how the certification maintenance program works for someone with an anniversary month of March:

- In March 2018, the holder of a VMASTM or CVS® will receive his or her first invoice from the SAVE business office for one year of maintenance fees. At that time, the certification holder’s first PDU accrual interval (one year) begins.
- At the end of the first maintenance period, in March 2019, the VMASTM or CVS® will receive an invoice for the next two-year maintenance period and an affidavit form from the SAVE business office. With the retroactive anniversary accrual, the certification holder can claim PDUs accrued from March 2017 to February 2019. The VMASTM or CVS® will send payment to SAVE along with their completed affidavit to attest that he or she has completed the required PDUs.
- The VMASTM or CVS® would now have two years, from March 2019 to February 2021, to accrue required PDUs.

CVS® MAINTENANCE AUDIT

On an annual basis, SAVE will randomly audit its CVS®s and request documentation proving continued education and value society and service PDUs. If audited, SAVE will request the CVS® to provide the following within three (3) months of notice:

CVS® Continued Education Submittal

A. Value Society Conference—Pre-Conference Course Attendee
   1. Evidence of Attendance. Certificate of completion, including the date(s), course subject/title and educational organization, or a letter on organization letterhead from the instructor indicating the same.
   2. Course Content. A one-paragraph description of the content and its applicability to the Value Methodology.
B. Value Society Conference Attendee
   1. Evidence of Attendance. Certificate of attendance, including the date(s), conference subject/title and sponsoring organization, or a letter on organization letterhead from a conference official indicating the same information.
   2. Conference Content. A one-paragraph description of the content and its applicability to the Value Methodology.
C. Value Society Conference Session Moderator
   1. Evidence of Attendance. A letter on organization letterhead from a conference official indicating the date(s), conference session subject/title.
   2. Conference Content. A one-paragraph description of the content and its applicability to the Value Methodology.
D. Value Methodology Related Courses
   1. Evidence of Attendance. Certificate of completion, including the date(s), course subject/title and educational organization, or a letter on organization letterhead from the instructor indicating the same.
2. **Course Content.** A one-paragraph description of the content and its applicability to the Value Methodology.

E. **College Courses**
   1. **Evidence of Attendance.** Transcript from the educational organization indicating the course subject title and course completion, or a letter on educational institution letterhead from the instructor indicating the date(s) and subject/title of the course.
   2. **Course Content.** A one-paragraph description of the content and its applicability to the Value Methodology.

F. **Professional Society Meetings**
   1. **Evidence of Attendance.** Receipt from the professional society, including the date(s) and meeting subject/title or a letter from the professional society chapter officer indicating the same.
   2. **Meeting Content.** A one-paragraph description of the meeting content and its applicability to the Value Methodology.

### CVS® Value Society Service Submittal

A. **National Officer.** A Letter from the value society president on value society letterhead attesting to the date range (i.e., from June 2017 to May 2018) of the applicant’s service as a national officer.

B. **Chapter Officer.** A letter from the chapter president (or other chapter officer if letter is on behalf of the chapter president) on chapter value society letterhead attesting to the date range of the applicant’s service as a chapter officer.

C. **National Committee Member.** A letter from the national value society president or a board member on value society letterhead attesting to service and indicating which committee served and the date range of service.

D. **Presentation.** For each presentation or speech, submit a description of topic discussed, the duration of presentation, audience type(s) (e.g., executives, project managers, etc.) and number of attendees. Also submit a signed letter from the sponsor on sponsoring organization letterhead attesting that the applicant presented, including the date, location and presentation topic.

E. **VMF 1 and VMF 2 Instruction.** For each time the course is taught, submit the course completion certificate that was provided to one of the students, including student name, course dates, course license number and instructor signature of CVS® holding course license.

F. **Membership.** A receipt for each year of membership or a printout of membership status from the value society website for each year claimed.

G. **Mentorship.** A statement signed by you and the candidate receiving your mentoring that you have provided mentorship, including the name of the mentee, timeframe of mentorship and the focus of the mentorship. Serving as a candidate’s advisor does not qualify for this submittal.

### EXPIRED CVS®

For individuals with a CVS® certification, their certification will go to expired status by failing to pay required maintenance fees by their anniversary date, or failure to submit the PDU audit affidavit summary by required date, or by direction of audit or ethics committee.
• Expired CVS® status forfeits all CVS® use. You may not use the certification mark or seek any benefit an active CVS® enjoys. Your workshops presented by applicants will not be honored. It is an ethical violation to claim active CVS® when you are not.
• 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.
• After a one-year grace period, the expired CVS® certification may not be reactivated and will set to inactive. Any time thereafter, if a person desires, he or she may make an application for certification as a VMA® and it will be granted without documentation or testing.

**CVS®-RETIRED**

CVS®-Retired is defined as CVS® in good standing who is no longer receiving compensation for value work, and may request retired status. If an individual with CVS® certification notifies the SAVE business office that he or she is no longer actively engaged in the Value Methodology field, then he or she may request to be classified as CVS®-Retired. Individuals with the CVS®-Retired designation may no longer engage in fee earning activities related to the Value Methodology.

**CVS®-LIFE**

CVS®-Life is no longer available as a recertification option after June 30, 2015. This designation implies no extra competency; it simply means the CVS® recertified three times. As such, those who were previously granted the CVS®-Life designation may continue to display the designation. CVS®-Life’s are strongly encouraged to actively mentor new comers to the Value Methodology.

**SECTION 4 - VALUE METHODOLOGY ASSOCIATE® (VMA®)**

**CERTIFICATION - VALUE METHODOLOGY ASSOCIATE® (VMA®)**

**VMA® Certification Requirements**

The SAVE Certification Program recognizes the Value Methodology Associate® (VMA®) as a certification designed for those new to the Value Methodology. Someone with the VMA® certification has demonstrated a good understanding of the principles and the basic tools of the Value Methodology 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 VMASM certification, one must:

- Select an advisor who is a Certified Value Specialist® in good standing.
- Complete the 32-hour SAVE approved Value Methodology Fundamentals 1 (VMF 1) course.
- Submit and pay the required VMASM application and fee.
- Take and successfully pass the VMASM certification exam.

MAINTENANCE - VALUE METHODOLOGY ASSOCIATE℠ (VMA℠)

To maintain VMA℠ certification, one (1) SAVE approved e-learning course is required per year. Courses may not be repeated for credit.

VMA℠ Maintenance Audit

On an annual basis, SAVE will randomly audit its VMA℠s, requesting documentation proving attendance of the SAVE approved e-learning courses during the VMA℠s previous two-year maintenance period. If audited, SAVE will request the VMA℠ to provide the following within one (1) month of notice:

- Course Documentation. SAVE e-learning course completion certificate.

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 SAVE business office if your AVS certificate is no longer available.
- Submit maintenance fee payment for VMA℠ credential.
- There is no training or testing required 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.
The purpose of the exam is to test the applicant’s knowledge of the Value Methodology. There is one exam for VMA® and another for CVS®. After an individual’s application is approved, the SAVE Certification Board will notify the candidate of eligibility to take the exam. The SAVE business office coordinates the necessary link to the exam site, where individuals will submit their application fee payment.

Exams are offered in English and electronic format only. The exam is given anytime, with a live proctor reviewing your activities via webcam and screen share. You can schedule the exam anytime and take it right then or come back later to begin. All questions are multiple choice and the exam is timed.

Individuals will need a computer with a functioning webcam, Chrome browser installed (without additional extensions installed is highly suggested) and photo ID. Exam applicants are given instructions, have time to get familiarized with the exam format and are allowed 8.5 by 11 blank papers for scratch.

A score of 70% or above must be achieved to pass the exam. If the applicant fails, they may retake the exam in 30 days up to three times in a one-year period. After the third failure, the applicant must reapply from beginning.

A Value Study consists of the following:

- Work on an identified value improving, structured, facilitated project, in a team environment in a face to face meeting. Remote or electronic participation is not allowed or recognized for initial certification or maintenance.
- Follows the Value Methodology job plan facilitated by a CVS® in good standing.
- Perform the function analysis phase during a workshop.
- “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.
- While essential to success, information gathering and proposal implementation activities do not count as study contact hours.
- For further details, please refer to the SAVE International® Value Methodology Glossary which can be found on the SAVE website.
In Good Standing
The term “In Good Standing” is defined as the VMA℠ or CVS® is current with all continuing education requirements and annual maintenance fees.

Active or Active Status
The terms “Active” or “Active Status” are defined as the VMA℠ or CVS® is current with all continuing education requirements and annual maintenance fees.

SECTION 6 - 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 in the following order in one pdf file.
  - Tab 1 – Certification worksheet
  - Tab 2 – Value Methodology Fundamentals 1 (VMF 1) and Value Methodology Fundamentals 2 (VMF 2) certificates
  - Tab 3 – Practice with back up material in order of summary worksheet
  - Tab 4 – Experience with back up
  - Tab 5 – Learn with back up
  - Tab 6 – Facilitation training back up
  - Tab 7 – Share with back up
  - Tab 8 – CVS® 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 SAVE business 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.
- Although membership in SAVE is not required for certification, it is encouraged and credited toward certification and maintenance.
- Individuals who allow their certification to expire are not permitted to use the CVS® designation. An individual with an expired certification who continues to practice using their certification designation will be remanded to the SAVE ethics committee for appropriate action.
Submit your application package to the SAVE business office at certification@value-eng.org. All documentation must be in one PDF document not exceeding 100MB total file size. Hard copies will not be accepted.

- Completed application: signed and dated by applicant and advisor
- Certification Matrix & Summary Worksheet: illustrating total CPs claimed
- Application Fee: Made payable to SAVE International
- PDF copy of VMF1 certificate
- PDF copy of VMF 2 certificate
- Documentation supporting CP’s claimed for PRACTICE VM
- Documentation supporting CP’s claimed for LEARN VM
- Documentation supporting CP’s claimed for SHARE VM
- Facilitation Training back up
- Paper

This checklist is to be used as both an enabler to all VMASM 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.

SAVE requires that all initial CVS® application packages contain this signed statement.

Review the entire application for the following:

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

______________________________________________ _________________
Advisor’s Signature Date
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, 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.

<table>
<thead>
<tr>
<th>Name</th>
<th>Discipline</th>
</tr>
</thead>
<tbody>
<tr>
<td>YOUR NAME HERE</td>
<td>YOUR ROLE HERE</td>
</tr>
<tr>
<td>J.J. Tasely</td>
<td>VM Team Leader</td>
</tr>
<tr>
<td>J.Q. Applicant</td>
<td>Mechanical Engineer</td>
</tr>
<tr>
<td>T.E. Seminski</td>
<td>Structural Engineer</td>
</tr>
<tr>
<td>W.A. Massarelli</td>
<td>Highway Engineer</td>
</tr>
</tbody>
</table>

- **Function Analysis**
  Submit evidence of function analysis that is meaningful and specific to the project (e.g. function listing, function cost/worth, or FAST diagram).

- **Statement of how team began Unfettered Creativity based function analysis outcome**

- **Workshop Agenda**
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 Professional in Value Management (PVM) 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 Certification Board and follow the requirements for recertification.

2. **Endorsement**: A member of the EGB or, by delegation, the chairperson of the National Certification Organization (NCO) 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.

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**SECTION 7 - PVM TO CVS® REQUIREMENTS**

May 1, 2018

15th Edition
• **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.”

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**SECTION 8 - FREQUENTLY ASKED QUESTIONS**

**What level of certification applies to me?**
The Value Methodology AssociateSM (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 and 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.

VMA® certification recognizes individuals with basic value training and minimal experience in the application of the Value Methodology. VMA® is not exposed to facilitation in the Value Methodology Fundamentals 1 (VMF 1) course, therefore is not by training qualified to lead value studies. A VMA® is encouraged to progress to CVS® certification and will have opportunity to gain valuable facilitation experience.

The Certified Value Specialist®(CVS®) certification is the highest level of certification available through the SAVE Certification Program. This status is reserved for individuals who possess basic and advanced Value Methodology training and significant value study experience. CVS® are experts in the Value Methodology and are study members, leaders, facilitators, instructors or VM program managers.

**How do I find out where Value Methodology Fundamentals 1 (VMF 1) and Value Methodology Fundamentals 2 (VMF 2) courses are offered?**
Approved VMF 1 and VMF 2 courses are offered throughout the year. For a listing of dates, consult the calendar of events on the SAVE website at [www.value-eng.org](http://www.value-eng.org). You may also refer to the list of approved instructors to find a qualified instructor to perform this activity at your organization.

**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 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 VMF 1 course 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 is required to afford the CVS® committee time to objectively review your application. VMASM applications and exams are usually processed within two weeks. Payment of the appropriate application fee is mandatory. The SAVE 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 one PDF file not exceeding 100MB total file size. Hard copy applications will be rejected.
- Clearly identify all CPs 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 CPs claimed followed by appropriate documentation.
- Include all necessary materials in each tab. A checklist for each level of certification is included in this manual.
- 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 by the SAVE business office, and your advisor will be copied, on any significant concerns. If your application is rejected, you may contact the SAVE Certification Board via email at certification@value-eng.org and request an appeal hearing.

How do I prepare for the exam?
After the SAVE Certification Board has approved your application, you will be notified that you may take the exam. It is recommended that you review the VMF 1 and VMF 2 course materials. Review of the Value Methodology Standard and the function materials 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?
All exams are now in an electronic format and can be taken on any computer with a screen facing camera. Contact the SAVE business office for your details pertaining to your specific exam.

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 two years thereafter.
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 ethics committee.

What should I do to prepare for maintenance?
The best way to minimize the anxiety of recertification is to begin to collect documentation from the time your certification or last maintenance 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 semiannual affidavit. As the time approaches for your anniversary date renewal, it should be a simple matter to compile the semiannual affidavit. Make sure you have accumulated enough PDUs. The SAVE Certification Board will be selecting random CVS®s to audit. If selected, you will be required to provide your semiannual affidavit with all back up material to the certification for compliance to the CVS® certification standard set forth in this manual. If unable or you fail the audit, your CVS® status will be set to expire. "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. CAUTION – some states define Value Engineering as the practice of engineering. The individual CVS® is solely responsible for compliance to any and all laws and regulations governing the use of a professional seal.

How may I pay my fees for either certification or for an exam?
The online application and payment are available on the SAVE website at www.value-eng.org/Certification. Just click on either CVS® or VMASM certification, then scroll down to the Application section. Please fill out the requested information, the payment information and submit the form. The SAVE business office will receive the information to begin the certification process.

I still have questions, whom should I contact?
Contact the SAVE business office at certification@value-eng.org or visit the SAVE website at www.value-eng.org for more information about joining SAVE, to view/download this manual or to search a current listing of certified individuals.

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