

SAVE International

Certification and Re-certification Manual



Guidelines - Policies - Procedures - Application - Forms

Sixth Edition – Effective July 2005

This document supersedes all previous documents issued.

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Certification Program Objectives

To create and maintain professional standards and improve the practice of the Value Methodology (VM) by identifying individuals who have successfully completed education and experience requirements.

To establish and maintain a professional recognition program encouraging value specialists and value program managers in the Value Methodology field to improve professional skills and competence in accordance with established standards.

To clarify methods, and procedures in the application of the Value Methodology; to create a better understanding of the value profession; to develop universal acceptance and increased application of value practices worldwide.

To establish and maintain ethical standards for individuals certified under this program.

To encourage the development and application of the Value Methodology; and encourage the successful application of projects in industry, construction and government.

The Certification Board is authorized by SAVE International to establish the specific requirements and procedures for conducting the Certification Program.

All questions regarding Certification should be directed to the Certification Board Administrator.

Overview

Based on the requirements set forth in this manual, individuals should decide which level of certification is applicable. SAVE International's Certification Program offers three levels of certification:

The first level is: *Associate Value Specialist (AVS)*

AVS is a recognition designed for individuals who are new to the Value Methodology. An AVS is encouraged to progress to VMP or CVS certification.

The second level is: *Value Methodology Practitioner (VMP)*

VMP recognizes individuals with basic VM training and some experience in the application of the methodology. Value Methodology Practitioners participate in or lead VM studies.

The third level is: *Certified Value Specialist (CVS)*

CVS is the highest level of certification attainable through SAVE International. Designation is reserved for Value Specialists and Value Program Managers who have demonstrated expert level experience and knowledge in the practice of the Value Methodology.

The Certification Board offers two tracks for CVS Certification. One track is for the *Value Specialist*, who teaches VM, or facilitates, leads or participates in VM studies. The other track is for *Value Program Managers* who are responsible to their employer for the management or direction of an in-house VM program. The Program Manager is not only responsible for the success of a study, but is also responsible for the overall success of a VM Program.

NOTE: All application and appropriate documentation once submitted become the property of the Certification Board once submitted. It has been and will continue to be the policy of the Certification Board to not return any application materials.

Certification & Recertification Requirements

Certification Points (CPs) relate to contact hours; generally ten contact hours equal one CP.

AVS

1. Select an advisor who is a CVS. (see page 8)
2. Complete an approved Module I Workshop
3. Submit application (see page 22)
4. Pass the AVS Examination
5. AVS Examination may be taken **only** after Certification Board approval of the application or when taken in conjunction with a Module I workshop (see page 10).

VMP

1. Select an advisor who is a CVS. (see page 8)
2. Complete an approved Module I Workshop
3. Accumulate **44** CPs
4. Submit application (see page 22)
5. Submit Certification/Recertification Summary Worksheet (see page 23)
6. Pass the VMP Examination after Certification Board approval of application.

Certification Point (CP) Requirements:

Category 1 – Practice VM: **24 CPs** which consist of 240 VM study contact hours and a minimum of 6 studies.

Note: All Practice VM CPs MUST be earned no sooner than one year prior to the completion of a Module I Workshop.

Category 2 – Learn VM: **15 CPs**

Category 3: Share VM: **5 CPs**

Recertification Point Requirements

VMP certification must be renewed every four years to maintain status. All CPs must be earned during the four-year recertification period. (Early recertification is not an option.) A

total of **37** CPs are required. These CPs need to be recorded on the Certification/Recertification Summary Worksheet (see page 23) and submitted with the application.

Category 1 – Practice VM: 24 CPs which consist of 240 VM study contact hours and a minimum of 6 studies.

Category 2: Learn VM: 8 CPs

Category 3: Share VM: 5 CPs

Comments

Points accumulated before the four-year expiration can be applied towards a CVS application.

CVS

1. Select an advisor who is a CVS. (see page 8)
2. Complete an approved Module I Workshop (time does not count under “learned”)
3. Complete an approved Module II Seminar; no sooner than six months after the Module I Workshop (time does not count under “learned”)
4. Accumulate **88** Certification Points (CPs) for a Value Specialist; **72** CPs for a Value Program Manager
5. Submit an original paper on a VM related subject
6. Submit application (see page 22)
7. Submit Certification/Recertification Summary Worksheet (see page 23)
8. Pass the CVS Examination after Certification Board approval of application and paper.

Certification Point (CP) Requirements:

Category 1 – Practice VM:

For Value Specialist – **48 CPs** which consists of 480 VM study **team** contact hours and a minimum of 12 studies. Contact hours may be as a team member, leader, co-facilitator or facilitator.

For Value Program Manager – **32 CPs** which consists of 80 VM study team contact hours (8 CPs) and a minimum of two studies. Plus three years full-time equivalent (FTE) as a

manager of user's VM program at 8 CPs per FTE for a total of 24 CPs.

Note: All Practice VM CPs MUST be earned no sooner than one year prior to the completion of a Mod I Workshop.

Category 2 – Learn VM: **30 CPs**

Category 3: Share VM: **10 CPs**

Recertification Point Requirements

CVS certification must be renewed every four years to maintain status. All CPs must be earned during the four-year recertification period. (Early recertification is not an option.) A total of **66 CPs** for Value Specialists and **50 CPs** for Value Program Managers are required. These CPs shall be recorded on the Certification/Recertification Summary Worksheet (see page 23) and submitted with the application for Recertification.

Category 1 – Practice VM:

For Value Specialist – **48 CPs** which consist of 480 VM 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.

For Value Program Manager – **32 CPs** which consists of four years full-time equivalent (FTE) as a manager of user's VM program. 8 CPs per FTE.

Category 2 – Learn VM:

For Value Specialist - **8 CPs**

For Value Program Manager – **8 CPs**

Category 3: Share VM: **10 CPs**

LIFE Recertification – CVS and VMP

Life status is available to any CVS or VMP upon approval of their third consecutive recertification. In essence the earliest Life Certification can occur is twelve years after initial certification. In addition, for CVS-Life, the applicant must have successfully completed or taught an approved Module II Seminar.

Once Life status is achieved, the individual will no longer be required to recertify every four years. While Life CVS's and VMP's are

still active in the Value Methodology field, the annual maintenance fee is required. If an individual with Life status notifies the Certification Board they are no longer actively engaged in VM either as an employee whose duties and responsibilities include VM or, as a private individual actively pursuing VM for a fee, they may request to be classified as CVS (or VMP)-Life Ret. And the annual maintenance fee will be discontinued. However, they will continue to receive the publications of the Certification Program. They may reactivate their CVS-Life or VMP-Life by notifying the administrator and begin paying the maintenance fee.

Certification Requirements Summary

AVS	VMP	CVS
\$120.00 member application fee	\$120.00 member application fee	\$120.00 member application fee
\$160.00 non-member application fee	\$160.00 non-member application fee	\$160.00 non-member application fee
Module I Required	Module I Required	Module I Required
Not Required	Not Required	Module II Required
Not Required	44 CPs accumulated	88 CPs for Value Specialist 72 CPs for Program Manager
Not Required	Not Required	Original Paper
AVS Examination	VMP Examination	CVS Examination
\$20 member, \$40 non-member annual fee	\$40.00 member, \$60 non-member annual fee	\$40.00 member, \$60 non-member annual fee
Does not expire	4 year certification	4 year certification
No recertification	Must re-certify every 4 years	Must re-certify every 4 years

NOTE: AVS applications when facilitated as part of a Module I workshop receive a \$60.00 discount from the above application fees.
Also, the AVS fee for a college student enrolled in a SAVE approved VE program is \$20.00.

SAVE CERTIFICATION MATRIX

Category	Description	Credit	Certification Points (CPs) Required											
			AVS (Entry)		VMP (Practitioner)			CVS (Program Manager)			CVS (Specialist)			
			Initial	Re-Cert. (2)	Initial	Re-Cert. (2)	Life	Initial	Re-Cert. (2)	Life	Initial	Re-Cert. (2)	Life	
I. Practice VM		Total CPs Required	0	24	24	24	32	32	48	48	48	48	48	
Ia. Perform VM		Total Performed CPs	0	24	24	8	0	0	48	48	48	48	48	
		Study Contact Hours	0	240	240	80	0	0	480	480	480	480	480	
		No. of Studies / Events	0	6	6	2	0	0	12	12	12	12	12	
		% of Studies and Hours										50%		
Ib. Manage VM		Manage User's VM Program				24	32							
		8 CPs / YR (1)												
III. Learn VM		Total CPs Required	0	15	8	30	8		30	8		8		
		SAVE Meetings, VM or VM Related Courses or Seminars (3)												
		College Degree (Bachelor or Graduate) (4)												
		20 CPs (1 maximum)												
		Professional License/Certification or Assoc. Degree (4)												
		5 CPs (2 maximum)												
III. Share VM		Total CPs Required	0	5	5	10	10		10	10		10		
		VM Teaching												
		Contact Hrs. (5 Hrs = 1 CP)												
		3 CP / Peer Reviewed												
		VM Publications												
		1 CP / Article												
		VM Publicity												
		1 CP / Presentation												
		VM Presentations												
		1 CP / Presentation												
		VM Society Membership												
		1 CP / YR (1)												
		4 CP / YR												
		VM Society Office - Local												
		Chapter Pres. or MVF or Nat'l Director, Cert. Bd.												
		8 CP / YR												
		National Board Member (elected)												
		10 CP / YR												
		2 CP / VMP or CVS												
		Certification Advisor												
Prerequisites		Basic VM Training	X	X		X	X		X	X		X	X	
		Advanced VM Training				X	X		X	X		X	X	
		Scholarly Paper				X	X		X	X		X	X	
		Exam	X	X		X	X		X	X		X	X	
		Upon Third Approved Recertification						X			X		X	
Life status		TOTAL Certification Points Required	0	44	37	72	50		88	66		66		
		YOUR TOTALS	0	0	0	0	0		0	0		0	0	

Certification Points (CPs) indicated are minimums required in a category or item description.

NOTES:

(CPs ARE NOT GIVEN FOR MOD I and MOD II)

(1) Year means full time equivalent (FTE).

(2) Recertification period is four years. There will be no early recertifications since intent is to show continued professional development over time.

(3) Continuing education consists of VM related chapter meetings, conferences, seminars, and courses; e.g., college courses that are VM related earn 1CP = 1 credit-hour

(4) College degrees are for initial certification only.

Note: The matrix shown above is an embedded spreadsheet to enable you to automatically total your points. If you have Microsoft Excel loaded on your computer, double click anywhere in the spreadsheet and Excel will launch.

Description of Qualifying Categories

I. Practice VM

IA. Perform VM

Team Member or Individual Study

VM studies in which you have participated as a *member* of a VM study team or as an *individual*.

Team Leader, Co-Facilitator or Facilitator

VM 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.

NOTE: A VM study consists of the following:

- a. Work on an identified value improving, structured, facilitated project
- b. Follow the VM job plan
- c. Perform function analysis
- d. In general, "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
- e. While essential to success, information gathering and proposal implementation activities do not count as study contact hours.

Credit: 1 Certification Point (CP) is earned for every 10 contact hours in a VM study.

Submit: For each VM study, 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. Illustrate the use of a recognized VM Job Plan. If the same Job Plan is used for all the studies, submit it only once
4. DO NOT submit excess documentation. Two to four pages per study is all that is required providing the correct documentation is included. Do not include study proposals, results and other detail. See sample submission packet located in the back of this manual. (page 17)

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

IB. Manage VM

A VM Program Manager directs or manages a VM program for an end-user of the VM process. While usually an employee of the user's organization, one may be contracted to manage and be responsible for an organization's VM program. A VM program manager may not actually participate in a VM study as a member or leader/facilitator, but is responsible for the direction of the entire program.

Credit: 8 CPs per full-time equivalent (FTE) year as a Program Manager.

For Recertification as a VM Program Manager, four years FTE (32 CPs) are required. If during the Recertification period, your role changes to or from a VM Program Manager, CP requirements shall be prorated between a specialist and a manager.

Submit:

1. A letter, signed by your supervisor or principle of the firm, attesting to your job responsibilities
2. Value Program Managers shall include a description of the VM program procedures, organizational chart, directives implementing the program, and a summary of program activities.

II. Learn VM

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

Credit: 1 CP for every 10 contact hours

1. Attending professional society chapter meetings like SAVE, IIE, PMI, AACE
2. Attending SAVE International or VM related conferences
3. VM courses: Examples include (but not limited to) courses on creativity, team building, facilitations skills, cost and costing methods, project management training, function analysis, presentation skills. Points will be allowed for a Module II if it is **not** a requirement of the level of certification (VMP). No points are allowed for Module I
4. VM related college courses earn 1 CP per credit hour.

Submit:

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

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 an advanced degree (masters or doctorate).

Credit:

1. Four year degree or an advanced degree: **20 CPs**
2. Two year degree: **5 CPs**

Submit:

Copy of diploma.

Professional License or Certification

VM 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), and Certified Quality Engineer (CQE).

Credit:

Professional license or certification: **5 CPs**
Credit is only allowed once, for the initial receipt of the license. Credit will be allowed for active, valid licenses.

Submit:

1. Copy of valid license or certificate
2. Evidence shall include a description of VM applicability.

III. Share VM

Teach VM

Credit is allowed for teaching courses in Value Methodology and Value Management, including approved Module I and Module II courses. Credit is allowed for teaching VM as sub-topic of another subject. Credit for teaching incidental to a Value Study is not allowed.

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.

Credit:

1. Three CPs for materials published in peer reviewed journals or publications (e.g. Value World, SAVE Proceedings, etc.)
2. One CP for non-reviewed publications (newspapers, company or organization newsletters such as Interactions or chapter newsletters, or publications with limited circulation)
3. 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.

Credit: 1 CP per presentation.

Submit:

1. Description of topic discussed
2. Length of presentation (30 minute minimum requirement)
3. Size and interest of audience
4. 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/National Director: **4 CPs per year**
3. Chapter President or Value Foundation Board Member: **8 CPs per year**
4. Certification Board Member: **8 CPs per year**
5. National Board Member (elected): **10 CPs per year**
6. National committee persons: **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.

Select Advisor

All applicants, regardless of the certification level (AVS, VMP, or CVS), are required to select an advisor.

An advisor is an individual who is a CVS and is familiar with the certification requirements. The advisor will:

1. Help the applicant determine which level of certification is appropriate
2. Actively guide and mentor applicant through the certification process
3. Review the application for compliance with the **current requirements**
4. Review the application submission to ensure that all required items are included and properly documented in an organized fashion
5. Assist CVS applicants with the selection of a topic for their thesis paper
6. Review the CVS applicant's paper for subject content and format, and insure that the paper represents a new body of knowledge
7. Review and sign the application
8. Confirm that the applicant is ready to take the required exams.

Source of Advisors

A listing of current CVS's is located on the SAVE International web site. The Certification Board Administrator is also available to assist in identifying an advisor.

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 plans
- Function, FAST, function-cost
- Creativity
- People-oriented topics
- Cost
- Evaluation and implementation.

The second required course for CVS is the **Module II** (Advanced Seminar) consisting of a **minimum** of 24 hours. The Module II Seminar may not be taken in less than 6 months after completing the Module I workshop. This allows time to accumulate the necessary VM experience. Module II attendees should be using 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 Plans

- Function Analysis
- Creativity (advanced)
- Financial Evaluation
- Interpersonal Skills
- Value Management.

Submit: Copy of certificate(s) issued by the Module I or Module II instructor. Be sure that the course you are taking is a SAVE approved course. You must receive a certificate with an identifying course number and expiration date of the course and CVS instructor.

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 work problem, FAST Diagramming, team building, certification requirements, financial, and an essay. Each level of certification requires additional parts to be completed for the examination (refer to the Examination Reference Chart).

After an individual's application is approved, the Certification Board will notify the candidate of eligibility to take the examination. An *Examination Study Guide* will be included with the Approval Notification Letter.

Examinations are offered annually preceding the SAVE International conference provided that the candidate has received approval of their application and paper prior to the conference. Candidates, wanting to take the examination, must contact the Certification Board Administrator.

Examinations may also be taken throughout the year, in the presence of a *proctor*.

A *proctor* may be an active CVS, a full-time faculty member of a recognized college or university, or an individual designated by the Certification Board.

If you choose to take the examination in the presence of a proctor, you must submit the following information to the Certification Board Administrator for approval

1. Name of proctor and their position
2. Address where the examination should be mailed
3. Affirmation by the proctor indicating their willingness to administer the examination
4. Scheduled date of examination.

Upon approval, the examination will be mailed to the proctor with specific 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 Board Administrator.

AVS exams may be proctored as an element of a Module I Workshop. The Module I facilitator may advertise and proctor the AVS exam at the conclusion of an offered workshop. A list of names of the AVS applicants who will take the exam is required. The applications and associated fees shall be submitted simultaneously with the completed exam.

A score of 70% or above in **each part** must be achieved to pass the examination. If the applicant fails, they must contact the Certification Board Administrator in writing, requesting to retake the examination; the scheduled date must be indicated.

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

Examination Reference Chart

Examination Parts	AVS	VMP	CVS
Part I Fundamentals 50 questions True or False	100 points 30 minutes	100 points 30 minutes	100 points 30 minutes
Part II Function Analysis Identify and classify functions, analyze function, cost/worth and value index	100 points 60 minutes	100 points 60 minutes	100 points 60 minutes
Part III FAST Draw a FAST diagram for the above work problem	Not Applicable	100 points 30 minutes	100 points 30 minutes
Part IV Team Building 20 questions True or False	Not Applicable	100 points 30 minutes	100 points 30 minutes
Part V Certification 25 questions True or False	Not Applicable	Not Applicable	100 points 15 minutes
Part VI Financial Identify VM opportunities, first costs, annual costs, break-even point and life-cycle costing	Not Applicable	Not Applicable	100 points 30 minutes
Part VII Essay Choose topic and prepare essay demonstrating VM principles	Not Applicable	Not Applicable	100 points 45 minutes
Total Examination Time	1 1/2 hours	2 1/2 hours	4 hours
Score to pass: 70 % 70% achievement is required for each part . Grades will not be averaged.			

CVS Paper

The purpose of the paper is to enable the Certification Board to judge the applicant's knowledge of the Value Methodology and their ability to communicate it effectively and professionally. The paper is also intended to further VM knowledge by making it available to publish in Value World and/or present at the annual conference. 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.

Submission:

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

Requirements:

- A minimum of 2,500 words, maximum of 5,000
- Must include a title page (title of paper, author's name, author's signature, and date of authorship)
- Presented in English
- Use simple 10 point font (i.e.: Times New Roman or Arial)
- Written specifically for the purpose of certification submission and cannot be previously presented or published; an exception to use a previously published paper may be granted. Prior approval from the CVS Director is required.
- Written for audiences of Value Specialists and/or Value Program Managers
- Topic must be approved by your CVS advisor.

Paper will be evaluated on:

- VM relevance/content – 20%
- Originality; new material – 20%
- Structure/grammar/punctuation – 20%
- Presentation format – 20%
- Clarity and continuity – 20%

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 VM discipline. 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 readers 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 to 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. use the singular “I,” such as; “I did this” or “I performed...”.
When using 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. Sub-topics are sections within the major and examples and points that support the sub and major topics.

For example:

- I. Brainstorming Process Techniques
 - A. The Carousel
 - B. Freewheeling
 1. Using a single facilitator
 2. Multiple facilitators
 3. 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

8. 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 spell check 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.

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 International Conference.

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

Application Information

A certification fee (reference Certification Requirements Summary Table) is due upon submission of certification documentation. Fees are applied to the administrative processing of the application and are **not refundable**. A yearly maintenance fee of will be assessed for all active certified individuals to sustain the Certification Program. SAVE International members will be invoiced with their annual dues with payment made to the Society Business Office (SBO). The Certification Office will invoice non-members. Payment by non-members should be made to the Certification Office, payable to "SAVE Certification Board".

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

The recommended format for an initial submission for VMP or CVS is:

- Application completely filled out with 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 if required.

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

of the application and the forfeiture of the application fee.

Certification is an individual recognition and may not be transferred or used to imply that an 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 VM related reports.

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

Individuals, whose applications are not approved by the Certification Board, may request an appeal hearing. The appeal panel will include the SAVE International Executive Committee, and the Certification Board Chair. The President of SAVE International will chair the panel.

Individuals, who fail to pay their annual maintenance fee or allow their certification to expire, will be considered on an inactive status, and are not permitted to use the AVS, VMP or CVS designation. To return to active status requires approval of the Certification Board. An individual on inactive status, who continues to practice using their certification designation, will be remanded to the SAVE International Ethics Committee for appropriate action.

What level of certification applies to me?

AVS certification recognizes individuals who are new to the field of VM, and have received basic VM training. It is an entry level from which advancement to VMP or CVS is expected.

VMP certification recognizes individuals that have VM training and some VM study experience. It is an intermediate level primarily for VM study team members.

CVS certification is the highest level of certification available through SAVE International. This status is reserved for individuals who possess basic and advanced VM training and significant VM experience. CVS's are experts in VM 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?

Both are offered surrounding the dates of the annual conference. You may sign up at the time of conference registration. Other approved Module I and Module II courses are offered throughout the year. For a listing of dates, consult: *Interactions* or the SAVE International Home page at www.value-eng.org. You may also refer to the Consultant's 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 period.

What Happens If I Am Performing VM and Get Promoted to a Managerial Position?

Whether you are making an initial application or going through the Recertification process when your primary position at an organization changes from one of Performing VM to Managing VM, you may combine points and use your performing credits toward your Managing CVS. You must however, obtain a total of 32 CPs for the initial and recertification applications.

What is an advisor?

An advisor is an individual who is a CVS and is knowledgeable of the current certification requirements. Preferably, this should be an individual in your region or someone that 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 for your AVS.



How long does the approval process take?

Providing that all documentation for VMP and CVS certification has been presented, the average time from submission to approval is approximately 2 months. This time is required to afford the Certification Board time to objectively review your application. AVS applications are usually processed in less than one week. AVS exams take approximately six weeks.

How can I speed up the process?

- Make sure that your submission is organized in the recommended submittal format
- 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. An examination study guide will be included with your Approval Notification Packet. Review of the VM Standard and the function monographs on the SAVE web site will be extremely helpful. Your advisor should help you prepare for the exam and recommend books available at the SAVE Bookstore.

Where and when can I take the examination?

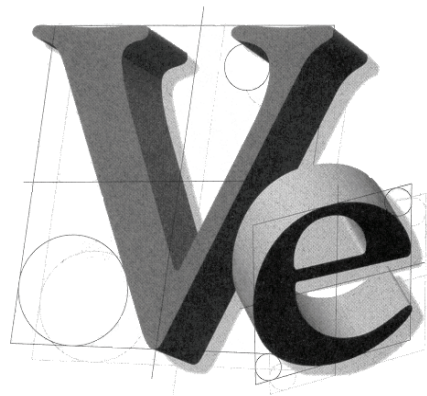
The examination is offered annually at the SAVE International Conference. Individuals wanting to take the examination at that time must receive authorization of approval from the Certification Board prior to the conference.

You 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 20020307. The first four characters represent the year of initial certification. The next two characters are the month and last two indicate that you were the seventh person to be certified in March 2002. Therefore your expiration date is March 31, 2006 and every four years thereafter. You may apply for Life certification as part of your third recertification.

You should receive a courtesy letter from the



Certification Administrator approximately 90 days before your certification expires. 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 the Certification Office does not have your current mailing address and/or you do not receive this letter, you are not excused from the recertification process or exempt from the penalties for failure to submit an

application. 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. (A CVS seal can be obtained from the Society Business Office.) It is hoped the use of the seal will heighten the professional image of all value managers.

I still have questions, whom should I call?

Contact the Certification Board Administrator. Please refer to the SAVE web site for the current contact information.
www.value-eng.org

VM Study Submission Sample Packet

VM Study Summary Example

Project	Dates	Role	Activity	Hrs.	CPs	CPs
					Member	Leader/Fac
Guide Rail	12/18/xx 1/2/xx- 1/6/xx 1/20/xx	Team Member	Pre-Study Study	4 40	4.0	
			Post Study	2		
Hospital A/C	2/9/xx 2/16/xx- 2/19/xx 3/2/xx	Team Leader	Pre-Study Study	2 32		3.2
			Post Study	3		
Bridge Abutment	4/7/xx 4/12/xx- 5/8/xx 6/10/xx	Team Member	Pre-Study Study	4 60	6.0	
			Post Study	4		
Procurement Procedures	8/15/xx 8/28/xx- 9/12/xx	Facilitator	Pre-Study Study	6 32		3.2
			Post Study	0		
			Totals		10.0	6.4

Grand Total CPs: 16.4

Use the Supporting Data for VM Study format and attach the following information for each study. The entire study report is not necessary and is absolutely discouraged. Attach only the following information:

1. A roster of participants clearly illustrating the title of the VM project, your role, dates and hours spent on each date.
2. The job plan followed needs to be included. If the same job plan is used for all studies, only submit the job plan once.
3. Submit copies of one or two pages from the study that illustrate the use of function analysis.

Reminder: The information submitted **must** illustrate the use of function analysis. Examples are: FAST diagrams, function/cost worksheets, creativity by function or evaluation techniques by function. **Do not include specific study results and back-up data.**

Value Methodology Job Plan Example

All projects conducted by my Value Engineering Department follow a standard VM Job Plan:

Pre-Study Phase

- Select projects (through meetings with internal departments and the customer)
- Select study team (and obtain commitments)
- Determine study schedule
- Arrange Facilities
- Gather basic project data

Note: all duties the responsibility of the VE team leader

Information Phase

- Complete information file
- Identify project objectives
- Scope of project identified

Function Analysis Phase

- Define and classify functions
- Develop function relationships (via hierarchy or FAST models)
- Establish function worth
- Select specific functions for study

Creative Phase

- Create an atmosphere conducive to idea generation
- Generate ideas, not answers, for alternative ways to accomplish the selected functions

Evaluation Phase

- Eliminate the obvious
- Sort and group ideas, retain the “no-brainers”
- Identify “best” ideas
- Resolve competitive combinations (Decision Matrix)
- Develop selected combinations

Development Phase

- Validate concepts
- Define implementation requirements
- Develop Implementation Plan

Implementation Phase

- Final Presentations
- Obtain implementation commitments
- Follow up (VE Team Leader responsible)
- Final Report (VE team leader)

Supporting Data for VM Study Example

This sheet should be prepared and submitted for each study claimed.

Name of Project: Highway Guide Rail

Dates of Team Meetings and Study: December 18, 20XX – 4 hours
January 2-6, 20XX – 40 hours
January 20, 20XX – 2 hours

Time in contact hours spent on VM Activity: 40 hours workshop
6 hours full-team preparation and follow-up

Calculated points claimed: 40 = **4.0 CPs**

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.

Project Team Roster:

<u>Name</u>	<u>Department</u>
J.J. Tasely, Team Leader (applicant)	Value Specialist
W. A. Dawes	Design
T. E. Seminski	Field Service
W.A. Massarelli	Procurement
T. O. O'Connell	Customer/User

AVS Submission Checklist

Submission Packet Includes:

- 1. Completed Application: signed and dated by applicant and advisor
- 2. Application Fee: _____ \$120.00 Member _____ \$160.00 Non-member

Application Fee: ___ \$60.00 Member (MOD I) ___ \$160.00 Non-member (MOD I)

Application Fee: ___ \$20.00 Student

Made payable to: SAVE Certification Board

- 3. Original & one (1) copy of application
- 4. Copy of Module I Certificate

Initial VMP Submission Checklist

Submission Packet Includes:

- 1. Completed Application: signed and dated by applicant and advisor
- 2. Certification Summary Worksheet: illustrating total CPs claimed
- 3. Application Fee: _____ \$120.00 Member _____ \$160.00 Non-member
Made payable to: SAVE Certification Program

- 4. Original & Four (4) copies of application and attachments (worksheet and documentation)

- 5. Five copies of Module I Certificate

- 6. Documentation supporting 24 CPs claimed in *Practice VM*
 - documentation clearly illustrates the use of “function analysis”
 - documentation clearly shows the minimum number of required hours and minimum number of required studies.

- 7. Documentation supporting 15 CPs claimed in *Learn VM*

- 8. Documentation supporting 5 CPs claimed in *Share VM*

Initial CVS Submission Checklist

Submission Packet Includes:

- 1. Completed Application: signed and dated by applicant and advisor
- 2. Certification Matrix & Summary Worksheet: illustrating total CPs claimed
- 3. Application Fee: _____ \$120.00 Member _____ \$160.00 Non-member
Made payable to: SAVE Certification Program
- 4. Original & FOUR (4) copies of application and attachments (worksheet and documents)
- 5. Five copies of Module I Certificate
- 6. Five copies of Module II Certificate
- 7. Documentation supporting 48 CPs claimed for the Value Specialist or 32 CPs claimed for the Value Program Manager in Category 1, *Practice VM*
 - documentation clearly illustrates the use of function analysis,
 - documentation clearly shows the minimum number of required hours and minimum number of required studies,
 - VM Program Manager documentation showing FTE CPs.
- 8. Documentation supporting 30 CPs in the Category *Learn VM*
- 9. Documentation supporting 10 CPs in the Category *Share VM*
- 10. Scholarly Paper: including abstract and title page

Certification/Recertification Application Form

1. Complete applicable portions of application and sign.
2. Complete the Requirement Matrix and arrange attachments in the sequence illustrated
3. Submit **original & four (4) copies** of application and attachments. (Not required for AVS)
4. Enclose appropriate fee payable to: SAVE Certification Board
5. Mail completed submission packet to the **Certification Office** (not SAVE Business office).
(Contact Les M. Thomas, P.E., C.V.S. @LThomaspe@AOL.COM)

Check one: Initial application _____ Recertification _____ Life _____

Check one and enclose indicated fee:	Member Fee	Non-member Fee
<input type="checkbox"/> Associate Value Specialist (AVS)	<input type="checkbox"/> \$120.00	<input type="checkbox"/> \$160.00
<input type="checkbox"/> Value Methodology Practitioner (VMP)	<input type="checkbox"/> \$120.00	<input type="checkbox"/> \$160.00
<input type="checkbox"/> Certified Value Specialist (CVS)	<input type="checkbox"/> \$120.00	<input type="checkbox"/> \$160.00

Note: An annual \$40.00 member maintenance fee (\$60 non-member) will be assessed all active certified persons.

Applicant's Name: _____

Company: _____

Mailing Address: _____

Phone: () _____ FAX: () _____

E-mail address: _____

For Recertification Applicant's ONLY: VMP or CVS Number: _____

SAVE International Member: Yes No Chapter Name: _____

I am a non-member, please send me information on joining SAVE International

Advisor's Name:

CVS Number: _____ Expiration Date: _____

Company:

Mailing Address:

Phone: () _____ FAX: () _____ E-mail address: _____

Having read the certification requirements, and believing myself fully qualified, I declare that all the submitted information is correct to the best of my knowledge. I have read the pledge to adhere to the SAVE International Standards of Conduct. I have attached the necessary documentation and will provide further evidence if requested.

Applicant's Signature

Date

Advisor's Signature

Date

Note: Advisor information not applicable for Recertification.

Certification/Recertification Summary Worksheet

(SUBMIT THIS WORKSHEET WITH YOUR APPLCIATION)

Name _____

For Recertification ONLY (Initial Applicants please skip)

Four-Year Period from previous certification / recertification date:
_____ to _____

I. Perform VM:

A. Perform VM

Total CPs Claimed _____

Value studies @ 1 CP per 10 Contact Hours

(VM study contact hours for formal, facilitated team meetings following the VM Job Plan. Contact hours **do not** include pre-study information gathering or post-study implementation activities.)

Value Study Title	Your Role	Dates of Study	Hours Claimed	CPsTeam Member	CPs Leader/Fac
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					
11.					
12.					

B. Manage VM

Total CPs Claimed _____

Value Program Manager employment @ 8 CPs/year (per full-time year - prorated)

Mo/Yr Dates	Name of Employer/ Business	Position Title	% Time	Brief Description of VM Manager Duties	CPs Claimed

Title of Course	Sponsoring Organization	Location	Dates	Contact Hours	CPs Claimed

B. Value Writing & Publication:

Credit: 1 CP for a published non-reviewed article or publicity piece (e.g. newsletter or Interactions).

3 CPs for a published reviewed article or book (e.g. Value world or SAVE Proceedings).

Title of Work	Publication	Date of Publication	No. of Authors	CPs Claimed

C. Value Speaking: Credit: 1 CP per presentation outside normal job duties.

Title/Topic	Sponsoring Organization/Conference	Location	Dates	Audience Size	CPs Claimed

D. Value Society Service:

Credit: membership in SAVE or other Value Society – 1 CP / Year

National Officer, National Committee, Chapter Officer - 4 CPs / year
 Chapter President, MVF or Certification Board member - 8 CPs / year
 National Board Member - 10 CPs / year

Value Society & Local Chapter	Office Held	Membership Dates (mo/yr.)	CPs Claimed

E. CVS or VMP Advisor (NOTE: for CVS Recertification ONLY)

Credit: 2 CPs per successful CVS or VMP candidate certified.

Name of Candidate	Certification Level & Number	Date Certified	CPs Claimed

List other activities that you believe may be worthy of consideration by the Certification Board for Certification or Re-certification.

Grand Total CPs Claimed _____

I certify that the information submitted is true, accurate and complete and will provide additional documentation if requested by the Certification Board.

Signature

Date

Note: For Initial Certification all documentation MUST be submitted.

Note: For Recertification the Certification Board will review the application and worksheet and may request documentation in support of your claimed Certification Points.

SAVE International

Come visit our home page at <http://www.value-eng.org>

Web site includes information about joining SAVE International.

**Web site includes this manual and a current listing of
AVS's, VMP's and CVS's.**

**Web site provides information on how to contact the
Certification Board Administrative Office.**