

# SAVE International

## Certification and Recertification Manual



*Guidelines - Policies - Procedures - Examples*

**Eleventh Edition – Effective May 1<sup>st</sup> 2011**

This document supersedes all previous documents issued.

"Certified Value Specialist", "CVS", "Associate Value Specialist", "AVS", "Value Methodology Practitioner", and "VMP" are certification marks of SAVE International™ and may be used only by individuals who have successfully completed the requirements of SAVE International's certification program and who maintain active certification.



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## Certification Program Objectives

The Board of Directors of SAVE International 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) 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 increase application of value practices.
- 5) 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 & development of new VM methods by students and academic advisors.

All questions regarding Certification should be directed to the Certification Board Executive Director.

## 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 value training and some experience in the application of the methodology. Value Methodology Practitioners participate in or lead value 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, who have demonstrated expert level experience and knowledge in the practice of the value methodology.

The Certification Board offers *three tracks* for CVS Certification. One *track* is for the *Value Specialist* practitioner, who either teaches the value methodology, leads or facilitates value studies, and, or who participates in value studies. The second *track* is for *Value Program Manager* who is responsible to their employer for the management or direction of a company or governmental in-house value program. The *Value Program Manager* is not only responsible for the success of a study, but is also responsible for the overall success of a Value Program. The third is for full time *Academics* who teach the value methodology at an accredited university.

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

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



## Certification & Recertification Requirements

General: "Certification Point (CP)" is the system for quantifying the Experience and Educational requirements for each level of certification. Reference the Description of Qualifying Categories for the CP to contact hours definition. Note that Category 1 - *Practice CPs* may not be accumulated earlier than one year prior to completing the Module I Workshop.

### AVS

1. Select an advisor who is a CVS.
2. Complete an approved Module I Workshop.
3. Submit application.
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.

### VMP

1. Select an advisor who is a CVS.
2. Complete an approved Module I Workshop
3. Accumulate **44 CPs** in the following categories:

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

Category 2 – Learn VM: **15 CPs**

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

4. Submit application and supporting documentation
5. Submit Certification/Recertification Summary Worksheet and supporting documentation.
6. Pass the VMP Examination after Certification Board approval of application.

### **VMP Recertification Point Requirements**

VMP certification must be recertified every four years. All CPs must be earned during the four-year recertification period. (Early recertification is not allowed.) A total of **37 CPs** are required. These CPs need to be recorded on the Certification/Recertification Summary Worksheet and submitted with the application. The CP's are in the following categories:

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

Category 2: Learn VM: **8 CPs**

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

### **VMP to CVS**

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

### CVS

1. Select an advisor who is a CVS.
2. Complete an approved Module I Workshop
3. Complete an approved Module II Seminar. (*The MOD II may not be taken sooner than six months after the MOD I Workshop unless the applicant participate in at least 2 value studies during the time between the MOD I and MOD II.*)
4. Accumulate **88 Certification Points (CPs)** for *Value Specialist Track*; **72 CPs** for *Value Program Manager Track*; and **77 CPs** for the *Academic Track*. (*Note: Modules I & II are requirements and do not count under Learn VM Category*)
5. Submit an original paper on a value related subject
6. Submit application
7. Submit Certification/Recertification Summary Worksheet and supporting documentation.
8. Pass the CVS Examination after Certification Board approval of application and paper. Academics must also maintain and present to the Certification Board a "Professional Diary."

### **CVS Certification Point (CP) Requirements:**

#### **CVS Cert Category 1 – Practice VM:**

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

For *Value Program Manager Track*– **32 CPs**, which consists of 80 value study team contact hours (8 CPs), with a minimum of 2 studies, and three years as *Program Manager*. An exception is allowed for one who changes roles during the qualifying four year period from a *Specialist* to a *Program Manager* which allows for a proration of experience provided one has a minimum of 8 *Program Manager* CPs during the last two years, and a total of 32 CPs.



### **CVS Cert Category 1 – Practice VM (continued):**

For *Academic Track* – **32 CPs** which consists of 80 value study team contact hours (8 CPs) with a minimum of 2 studies done in a non-academic setting application to live projects in construction, manufacturing or business; a minimum of 80 value related research hours (8 CPs) performing an action-research project or other approach to research that requires working with teams to achieve value.

Also required is the teaching of a minimum of four semester courses (4 CPs per semester) in the value methodology using the curriculum of the Miles Value Foundation, a SAVE approved 40 hour Module I Workshop or equivalent.

### **CVS Cert Category 2 – Learn VM:**

For *Value Specialist and Value Program Manager Tracks* - **30 CPs**

### **CVS Cert Category 3: Share VM:**

For *Value Specialist and Value Program Manager Tracks* - **10 CPs**

For *Academics Track* - **15 CPs** and a Professional Diary submitted to the Certification Board to record key stages of progress. The CVS advisor is to act as the guide/mentor through the process. The Professional Diary tracks performance and management of difficulties. Participate in a professional interview at a SAVE conference where the Professional Diary is explained to a Certification Board panel. **3 CPs** of the Share VM CPs are for a refereed paper and **1 CP** for presenting a paper at a SAVE conference or chapter meeting.

### **CVS Recertification 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 allowed.) A total of **66 CPs** for Value Specialists and **50 CPs** for Value Program Managers, and **55 CPs** for Academic are required. These CPs shall be recorded on the Certification/Recertification Summary Worksheet and submitted with the application for Recertification. The applicant is required to attest that they have attained the minimum CPs and studies as outlined below with the submission of their application.

### **CVS Recert Category 1 – Practice VM:**

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

For *Value Program Manager Track* – **32 CPs** which consists of a minimum of 80 value study team contact hours and a minimum of two studies; and two full-time equivalent consecutive Program Manager years, (16 CPs), plus a combination of additional Program Manager CPs and or value studies for a total of 32 CPs.

For *Academic Track*– **32 CPs** which consists of two project studies, 80 hour research project, and teaching four semester courses on VM.

### **CVS Recert Category 2 – Learn VM:**

For *Value Specialist Track* - **8 CPs**  
For *Value Program Manager Track* – **8 CPs**  
For *Academic Track* – **8 CPs**

### **CVS Recert Category 3: Share VM:**

For *Value Specialist and Value Program Manager Track* - **10 CPs**

For *Academic Track* - **15 CPs** with 3 CP's earned in a refereed publication and 1 CP for presenting a paper at a SAVE conference or chapter meeting.

### **LIFE Recertification – CVS and VMP**

Life status is available to any CVS or VMP upon approval of their third consecutive recertification and completion of the MOD II. In essence the earliest Life Certification can occur is twelve years after initial certification. 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 for non-SAVE members. If an individual with Life status notifies the Certification Board Executive Director that they are no longer actively engaged in value methodology field, they may request to be classified as CVS (or VMP)-Life Retired. For retired, the annual maintenance fee will be discontinued. Retired will continue to receive the publications of the Certification Program. They may reactivate their CVS-Life or VMP-Life by notifying the executive director and begin paying the maintenance fee at that time.



## PVM to CVS Requirements

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

1. *A valid PVM Certificate*; The duration of CVS certification shall be four years from the date of approval. Once certification is achieved, the candidate shall apply for recertification through the SAVE International Certification Board and follow the Board's rules for recertification.
2. *Endorsement*: A member of the EGB (European Governing Board) or, by delegation, the chairperson of the NCO (National Certification Organization) of the country of the applicant shall submit an endorsement of the applicant. To overcome the question of validating the applications 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 CB to spot audit any information presented in the application, by the applicant.
3. *CVS Advisor* This is optional, but advised. 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 includes; 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 closer) to the date of the application.

*Client Company*: This is the name of the client for whom the applicant was performing 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 task team was engaged in performing the value study assignment. This excludes any planning activities, or pre-event meeting that do not include the full value study task team.

*Total number of hours required: 48 CPs – 480 Hours – Minimum 12 studies.*

*Total Facilitator Hours*: State the total number of hours that the applicant served as lead or co-facilitator for that project.

*Total number of hours required: 48 CPs – 480 Hours.*

*Notes*: Add any notes that would assist the CVS evaluators in understanding compliance with application requirements.

*FAST Models*: A minimum of two FAST Diagrams created for the above assignments in which the applicant was the lead, or co-facilitator. The FAST diagrams can reflect the Classic, Technical, or Customer FAST techniques.

*Note: Function Tree may be accepted as a variation of the Customer FAST if it clearly shows a function hierarchy and is consistent with the SAVE International Value Standard.*

5. *Biography, or Resume*' Include a short (1 to 1 ½ pages) description of the applicant's professional history. This should include academic accreditation, other certifications, publications, honors and awards.

6. *Additional Requirements* Statement by applicant that they have read the SAVE International Value Standard and understand 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.



## Certification Requirements Summary

AVS	VMP	CVS
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 77 CPs for Academics
Not Required	Not Required	Original Paper
AVS Examination	VMP Examination	CVS Examination
Does not expire	4 year certification	4 year certification
No recertification	Must re-certify every 4 years	Must re-certify every 4 years

### NOTES:

For individuals whose VMP or CVS has expired:

Within the first year (grace period) following the certification expiration date, an individual may apply for recertification by submitting proof of compliance with the then current recertification requirements, including having all fees being current, without penalty or special approval;

In the year after the one (1) year grace period; an individual that meets current requirements, may appeal to the Certification Board for reinstatement.

After two years, the certification is considered expired may not be renewed. Any time thereafter, if a person desires, they may make an application for certification as an AVS, and it will be granted without documentation or testing;

Or after two years, a person may apply for either the VMP or the CVS and be approved to take the VMP or CVS exam (Parts III, IV, V, VI, VII) provided they have attained the then current required number of CPs in each area of experience (performed, learned, and shared). The applicant's previous MOD I, MOD II will count towards certification requirements, however, only the applicant's previous work experience which had not been previously counted towards previous certifications, will be eligible.



SAVE CERTIFICATION MATRIX - Certification / Recterification Manual

Category	Description	Credit	AVS				VMP (Practitioner)			CVS (Program Manager)			CVS (Specialist)			PVM to CVS	CVS (Academic)		
			Initial	Initial	Re-Cert. (2)	Life	Initial	Re-Cert. (2)	Life	Initial	Re-Cert. (2)	Life	Initial only	Initial	Re-Cert. (2)	Life			
<b>I. Practice VM</b>		<b>Total CPs Required</b>	<b>0</b>	<b>24</b>	<b>24</b>		<b>32</b>	<b>32</b>		<b>48</b>	<b>48</b>		<b>36</b>	<b>32</b>	<b>32</b>				
Ia. Perform VM			0	24	24		8	0		48	48		36	8	8				
	Team Member	Study Contact Hours	0	240	240		80	0		480	480		360	80	80				
	Team Member	No. of Studies / Events	0	6	6		2	0		12	12		9	2	2				
	Team Leader/Facilitator (5)	% of Studies and Hours									50%		50%						
Ib. Manage VM	Manage User's VM Program	8 CPs / YR (1)					24	32											
Ic. Educate VM	Academic Teaching of VM semester course	4 CPs / Semester Course (a)												16	16				
	Lead Facilitator (d)	Research Study Hours (80 min.)												8	8				
<b>II. Learn VM</b>		<b>Total CPs Required</b>	<b>0</b>	<b>15</b>	<b>8</b>		<b>30</b>	<b>8</b>		<b>30</b>	<b>8</b>		<b>PVM</b>	<b>30</b>	<b>8</b>				
	SAVE Meetings, VM or VM Related Courses or Seminars (3)	Contact Hrs (10=1CP)																	
	College or Graduate Degree (4)	20 CPs (1 maximum)																	
	Professional License or Assoc. Degree	5 CPs (2 maximum) (4)																	
<b>III. Share VM</b>		<b>Total CPs Required</b>	<b>0</b>	<b>5</b>	<b>5</b>		<b>10</b>	<b>10</b>		<b>10</b>	<b>10</b>		<b>PVM</b>	<b>15</b>	<b>15</b>				
	VM Teaching	2 x Contact Hrs. (5 Hrs = 1 CP)																	
	VM Publications	3 CP / Refereed Publication												3	3				
	VM Publicity	1 CP / Article																	
	VM Presentations	1 CP / Presentation																	
	VM Presentations (Academics)	1 CP Present Paper at SAVE (c)												1	1				
	VM Society Membership	1 CP / YR (1)																	
	VM Society Officer, committee	4 CP / YR																	
	Chapter Pres., MVF, Cert. Bd.	8 CP / YR																	
	VM Society Board Member	10 CP / YR																	
	Certification Advisor	2 CP / VMP or CVS																	
	VM Team listed Trainee	1 CP/ 40 Hr. Workshop																	
<b>Prerequisites</b>	Basic VM Training	Appvd. Module I Workshop	X	X			X			X			Active PVM	X (e)					
	Advanced VM Training	Appvd. Module II Seminar					X		X	X		X	Active PVM	X (e)					
	Scholarly Paper	Original, Sole Author					X			X			Active PVM	X					
	Exam	Parts I-VII, Based on Level	X	X			X			X			Active PVM	X					
	Professional Interview (d)	Maintain Professional Diary (8)												X	X				
<b>Life status</b>	Upon Third Approved Recertification					X			X			X	See CVS			X			
	<b>TOTAL Certification Points Required</b>		<b>0</b>	<b>44</b>	<b>37</b>		<b>72</b>	<b>50</b>		<b>88</b>	<b>66</b>		<b>PVM + 36</b>	<b>77</b>	<b>55</b>				



*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.*

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

- (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. For recertification, licenses are for initial award during recertification period (not renewal)
- (5) For CVS recertification as a specialist, 50% of the studies or hours must be in the role of facilitator or leader (including co-facilitating / co-leading with another CVS).
- (6) CVS VM Program Manager may prorate CPs in I-Practice VM. On initial certification, minimum 8 CPs in 2 years & 8 CPs & 2 studies but must total 32 CPs. For Recertification, minimum of 16 CPs in 4 years are required. The remaining 16 CPs may be earned by Perform VM (4 studies & 160 hours).

#### **CVS - Full-time Academics:**

- (a) Semester course taught using at least one live project in the classroom will be treated as the equivalent of a 40 hour project study.
- (b) Maintain "Professional Diary" provided by SAVE Certification Board to record key stages of progress. The selected CVS advisor to act as their guide/mentor through the process. The Professional Diary allows SAVE to track performance and manage difficulties.
- (c) Presentation of an academic paper at a SAVE Conference or a SAVE Chapter meeting that deals with an aspect of the Value Methodology. Record in Diary.
- (d) Professional interview at a SAVE conference where the Professional Diary is explained to a Certification Board panel.
- (e) Perform action-research project or other approach to research that requires working with teams to achieve value. Minimum of 80 hours is required.
- (f) Pass Mod I and Mod II both of which to be assessed by a piece of coursework that critiques the methodology and compares it to the literature. (Mere attendance is insufficient)



## Description of Qualifying Categories

### I. Practice VM

#### IA. Perform VM

##### Team Member or Individual Study

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

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

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

*NOTE: A value study consists of the following:*

- a. *Work on an identified value improving, structured, facilitated project*
- b. *Follows the VM Job Plan*
- c. *Perform function analysis*
- d. *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 if the entire team is present.*
- e. *While essential to success, information gathering and proposal implementation activities do not count as study contact hours.*
- f. *For further details refer to the SAVE International Value Methodology Standard*

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

**Submit:** For each value 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. Evidence of unfettered (unconstrained) creativity.
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. See sample submission packet located in the back of this manual. (page 20)

*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 end-users of the value 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 value 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 pro-rated between a Specialist and a Program Manager (2 years minimum as a PM).

**Submit:**

1. A letter, signed by your supervisor or principle of the firm, attesting to your job responsibilities
2. VM Program Managers shall include a description of the value program



procedures, organizational chart, directives implementing the program, and a summary of program activities.

### IC. Educate VM

For full-time academics who educate students by the teaching of semester courses in the value methodology.

**Credit:** 4 CPs per semester course taught in the value methodology using the curriculum of the Miles Value Foundation, an approved Module I course or equivalent. A minimum of four semester courses is required. 160 value study team contact hours (8 CPs) and a minimum of four studies are required. Two of these studies would be done in a non-academic setting application to live projects in construction, manufacturing or business. The remaining two studies would be part of teaching semester value methodology courses in a university setting.

**Submit:**

1. A letter, signed by the Dean of the school, attesting to your teaching responsibilities
2. Academics shall include a description of the value methodology semester course curriculum, list of students taught, description of project used in the course, and a summary of teaching objectives.

### **II. Learn VM**

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

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

1. Attending professional society chapter meetings such as SAVE, IIE, PMI, AACE
2. Attending SAVE International or value related conferences
3. VM related 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 are not allowed for a MOD II towards a CVS, but will be allowed for a VMP application. No points are allowed for Module I
4. Value 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 its applicability to the value methodology.

### College Degrees

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

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), and Certified Quality Engineer (CQE).

**Credit:**

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

**Submit:**

1. Copy of valid license or certificate
2. Evidence shall include a description of its applicability to the value methodology.

### **III. Share VM**

#### VM Teaching

Credit is allowed for teaching approved Module I and Module II courses. Credit is allowed for teaching other value methodology courses unless this is conducted as part of one's normal and



expected job responsibilities within one's own organization. Credit is allowed for teaching the value methodology as a sub-topic of another subject. Note that only the hours that VM is taught will be counted towards this requirement. For Academics, credit is given for teaching outside normal job responsibilities.

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

**Submit:**

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

VM Publications and Publicity

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

**Credit:**

1. **3 CPs** for materials published in peer reviewed journals or publications (e.g. Value World, SAVE Proceedings, etc.) This is required for recertification for Academics.
2. **1 CP** for non-reviewed publications (newspapers, 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. Presentations within one's own organization do not count.

**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: **4 CPs per year**
3. Chapter President, Miles Value Foundation Board Member: **8 CPs per year**
4. Certification Board Member: **8 CPs per year**
5. Society Board Member (elected): **10 CPs per year**
6. Society committee member: **4 CPs per year**
7. Certification Advisor for VMP/ CVS: **2 CPs per applicant** successfully certified.

**Submit:** A signed statement from an officer or Chair, or Notification of Appointment.

VM Team listed Trainee

**Credit: 1 CP** will be awarded for including a "listed" VM trainee on a 40 hour VE/VM Study.

**Select Advisor**

All applicants, regardless of the certification level (AVS, VMP, or CVS) are required to select an advisor. An advisor is any current CVS. The advisor will:

1. Help the applicant determine which level of certification is appropriate
2. Actively guide and mentor 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. Confirm that the applicant is ready to take the required exams.
8. Review and sign the Advisor checklist form on page 25 .

#### Source of Advisors

A listing of current CVS's is located on the SAVE International web site. The Certification Board Executive Director and Administrator are 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 unless the individual demonstrates participation in at least two value studies prior to taking the MOD II. This allows time to accumulate the necessary value 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 the 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, FAST Diagramming, team building, certification requirements, financial, and an essay. Refer to the Examination Reference Chart below for details.

After an individual's application is approved, the Certification Board will notify the candidate of eligibility to take the examination. Prior to taking the examination it is recommended that the applicant download and review the *Certification Study Guide*.

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 wishing to take the examination must contact the Certification Board Executive Director.

Examinations may also be taken throughout the year, in the presence of a *proctor*. A *proctor* is an active CVS (not ones' advisor), 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 Executive Director for approval:

1. Name of proctor and their position
2. Address where the examination should be mailed and proposed date of the examination.

The proctor must affirm to the Executive Director indicating their willingness to administer the examination and their position.

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

If the examination is not taken within 30 days of the scheduled date, the unopened examination packet **must** be returned to the Certification Board Executive Director.



AVS exams may be proctored in conjunction with 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 and the date that the exam will be proctored 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 Executive Director or

Administrator in writing, requesting to retake the examination; the scheduled date must be indicated. Re-examinations can be taken at the candidate's discretion, not to exceed one year from the previous examination. However, the policy is that no more than two re-examinations will be allowed. A CVS candidate who is currently certified as an AVS or VMP is required to take only those sections of the examination not previously completed.

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

## Examination Reference Chart

<i>Examination Parts</i>	AVS	VMP	CVS
<b>Part I Fundamentals</b> 40 Multiple Choice Questions	100 points 30 minutes	100 points 30 minutes	100 points 30 minutes
<b>Part II Function Analysis</b> 40 Multiple Choice Questions	100 points 60 minutes	100 points 60 minutes	100 points 60 minutes
<b>Part III Work Problem</b> Identify, classify functions and draw a FAST Diagram	Not Applicable	100 points 60 minutes	100 points 60 minutes
<b>Part IV Team Building</b> 20 Questions True or False	Not Applicable	100 points 30 minutes	100 points 30 minutes
<b>Part V Certification</b> 25 Questions True or False	Not Applicable	Not Applicable	100 points 15 minutes
<b>Part VI Financial</b> Identify VM opportunities, first costs, annual costs and break-even point.	Not Applicable	Not Applicable	100 points 30 minutes
<b>Part VII Essay</b> Choose a topic and prepare an essay demonstrating VM principles.	Not Applicable	Not Applicable	100 points 45 minutes
<b>Total Examination Time</b>	<b>1 ½ hours</b>	<b>3 hours</b>	<b>4 ½ hours</b>



## 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 the value methodology 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 value methodology 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. the use of 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 will be assessed for all active AVS certified individuals and VMP or CVS non-SAVE members to sustain the Certification Program.. SAVE International members will be invoiced with their



annual dues with payment made to the Certification Administration Office (CAO). The Certification Office will invoice non-members. Payment by non-members should be made to the CAO, 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 Administration 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 value methodology 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, VP Certification 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 expired, and are not permitted to use the AVS, VMP or CVS designation. An individual with an expired certification, who continues to practice using their certification designation, will be remanded to the SAVE International Ethics Committee for appropriate action.



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

AVS 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 from which advancement to VMP or CVS is encouraged.

VMP certification recognizes individuals that have value methodology training and some value study experience. It is an intermediate level certification.

CVS certification is the highest level of certification available through SAVE International. This status is reserved for individuals who possess basic and advanced value methodology training and significant value study experience. CVS's are experts in the value methodology and are study members, leaders, facilitators, instructors or VM program managers.

### **How do I find out where Module I Workshops and Module II Seminars are offered?**

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](http://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 certified 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 Perform VM to Manage VM, you may combine points and use your performing credits toward your Manage 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.

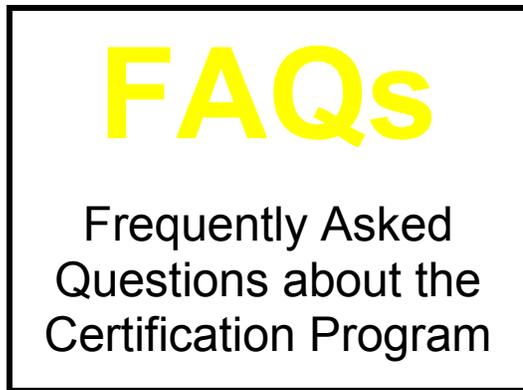
### **How long does the approval process**

#### **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 three 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. It is recommended that you review the Examination Study Guide will be included with your Approval Notification Packet. Review of the Value Methodology 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?***

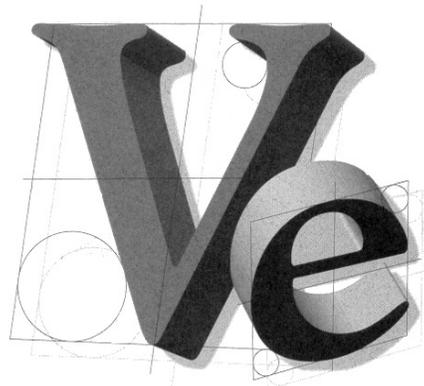
The examination is offered annually at the SAVE International Conference. Individuals wanting to take the examination at that time must receive authorization of approval from the Certification Board prior to the conference.

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 200203007. The first four characters represent the year of initial certification. The next two characters are the month and last three indicate the level of certification. 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 Administration Office 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 Administration 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. Remember it is your responsibility to keep your certification current. Continuing to use certification designation once expired is a breach of ethical conduct and will be referred to the SAVE International Ethics Committee.



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

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

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

CVS are encouraged to use their seal on formal documents. (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.

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

SAVE International now has online application and payment available. Simply follow the hyperlink: [http://www.value-eng.org/education\\_certificationprg.php](http://www.value-eng.org/education_certificationprg.php). On that web page, click on the link "**Certification/Recertification Online Application**". Please fill out the requested information and the payment information and submit the form. The Certification Board Administrator (Karen Smith) will receive the information to begin the certification process and process the credit card payment.

### ***I still have questions, whom should I call?***

Contact the Certification Board Executive Director. Please refer to the SAVE web site for the current contact information.  
[www.value-eng.org](http://www.value-eng.org)



# VM Study Submission Sample Packet

## General Instructions

Use the Supporting Data for VM Study format on the following page and attach the following information for **each** VM study claimed under Perform VM. **Do not** submit the entire study report. A summary table of all VM studies is **not** necessary since they will be summarized on the Certification Summary Worksheet Submit all of, and only, the following information:

1. On the Supporting Data for VM Study sheet, one page per VM Study if possible, include the following information:
  - a. The title of the VM project
  - b. A brief description of the project
  - c. A roster of participants clearly illustrating, your role, dates and hours spent on each date.
2. Submit evidence (one or two pages) of function analysis that is meaningful and specific to the project (e.g. function listing, function cost/worth, functional diagram, function hierarchy model, or FAST diagram).
3. Submit evidence of unfettered (not constrained) creativity (e.g. number of ideas generated, number of ideas selected for further development, list of target functions/areas). This evidence may be incorporated into the Supporting Data for VM Study sheet. **Do not** submit a multiple page list of creative ideas.
4. The job plan followed needs to be included. If the same job plan is used for all studies, only submit the job plan **once**.

**Reminder: Do not submit specific study results and back-up data.**



## Supporting Data for VM Study (Example)

*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:*

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 towards Perform VM (e.g. Individual review of design documents pre-workshop)

*Project Team Roster:*

<u>Name</u>	<u>Discipline</u>
J.J. Tasely	VM Team Leader
J. Q. Applicant	Mechanical Engineer
T. E. Seminski	Structural Engineer
W.A. Massarelli	Highway Engineer
C.T. Dummy	Safety Specialist
T. O. O'Connell	Customer/User

*Evidence of Unfettered Creativity* 116 creative ideas generated:



## Value Methodology Job Plan Example

All projects conducted 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)



## AVS Submission Checklist

*Submission Packet Includes:*

*The entire process may be completed on-line or you may do the following:*

- 1. Completed Application: signed and dated by applicant and advisor,
- 2. Application Fee:  
*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:*

*The entire process may be completed on-line or you may do the following:*

- 1. Completed Application: signed and dated by applicant and advisor
- 2. Certification Summary Worksheet: illustrating total CPs claimed
- 3. Application Fee:  
*Made payable to: SAVE Certification Program*
- 4. Original & TWO (2) 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:*

*The entire process may be completed on-line or you may do the following:*

- 1. Completed Application: signed and dated by applicant and advisor
- 2. Certification Matrix & Summary Worksheet: illustrating total CPs claimed
- 3. Application Fee:  
*Made payable to: SAVE Certification Program*
- 4. Original & TWO (2) 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



## CVS Advisor Checklist

This checklist is to be used as both an enabler to all CVS Advisors and provide a method to improve the quality of CVS application submittals. As a CVS Advisor your role is exactly as it states; advise. Failure to properly advise your CVS candidate may cause their application to be delayed or worse yet declined. Therefore as a CVS Advisor you should follow the items on this checklist and sign off that you have performed these tasks.

NOTE: It is required that this signed document to be included in the application's submittal.

Review the entire application for the following:

1. Does the candidate meet the CVS requirements and have enough acceptable Certification Points (CP's) in each category?
2. Are the application worksheets completed properly?
3. Does the candidate have all the necessary supporting documentation to support the CP's that they are claiming?
4. Is the application with supporting documentation organized so that the documentation for each claimed CP can be easily correlated? A suggestion is to have a section for each of the three categories. Under VM Performed, the supporting documentation for each study should be in the same order as the list of studies on the application form. Under VM Learned and VM Shared, the documentation should be in the same order as the events are listed on the workshop application form.
5. Did you read, review and improve the scholarly paper for your candidate? Did you insure that the paper meets the CVS guidelines and requirements?
6. Did you review with the applicant the CVS exam parts and offer assistance and coaching to them before they will take the exam?

---

Advisor's Signature

---

Date



## **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 Executive Director.**

