

SAVE International®

Certification Program Manual

17th Edition, Effective 1 January 2025

This edition supersedes all previous SAVE Certification Manuals issued.

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Section 1—Certification Program Information

1.1. Introduction

1.1.1. Purpose of This Manual

The purpose of the SAVE International® Certification Manual is to inform prospective and existing SAVE International® certification holders of the requirements for and policies governing certification and certification renewal.

The goal of this edition is to introduce the requirements and procedures for certification based on a major overhaul of the SAVE International® Certification Program. The defined changes are intended to transform the certification requirements into a concise, clear set of qualifications based on demonstrated knowledge of the SAVE International® Value Methodology Core Competencies (Core Competencies) needed to effectively apply the SAVE International® Value Methodology (VM), and guidance provided in the [SAVE International® VM Guide®](#) (VM Guide).¹

1.1.2. Resource Hyperlinks

This document includes hyperlinks to access related resources and information, which may be updated on occasion, and to aid the reader in finding information referenced in this manual. Please check to be sure you have downloaded the most recent versions of the documents. The latest edition of the SAVE Core Competencies, application forms, and other certification-related documents are available on the [Certification page of the SAVE website](#).

1.2. Certification Limitations and Rights

Certification is an individual recognition and may not be transferred or used to imply that another person, association, education institution, agency, or firm is certified.

Although membership in SAVE is not required for certification, it is encouraged and is credited toward Certified Value Specialist® (CVS®) renewal.

The SAVE Certification Board reserves the right to change, amend, add, or eliminate any requirement and/or policy it has issued or will issue.

The SAVE Certification Board defines the certification policy, application approvals, and rejections. The SAVE Board of Directors is the final authority.

¹ [SAVE International® VM Guide®](#): A Guide to the Value Methodology Body of Knowledge, ©2020 SAVE International.

1.3. Certification Program Objectives

The SAVE International® Board of Directors has authorized a certification program to be administered by a Certification Board that will:

- Establish, maintain, and administer professional certification programs to promote and support the practice of the VM globally
- Establish and maintain professional development requirements in the VM in accordance with established standards
- Clarify methods and procedures in the application of the VM
- Create better understanding of the VM profession
- Encourage universal acceptance and expanded use of VM practices

The Certification Board shall submit to the SAVE International® Board of Directors an annual report of performance to program objectives, and recommendations for future plans to improve the Certification Program.

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

1.4. Certification Policy

1.4.1. Certification Designations

1.4.1.1. Value Methodology AssociateSM

The Value Methodology AssociateSM (VMASM) is a professional certification of SAVE International® that recognizes individuals who have demonstrated a fundamental level of knowledge of the Value Methodology sufficient to participate in a VM study as a VM team member and/or assistant facilitator.

For the purpose of certification, SAVE does not recognize VMAs as qualified to lead VM studies or to teach Value Methodology Fundamentals 1 (VMF 1) or Value Methodology Fundamentals 2 (VMF 2) VMF 2 courses (see Section 1.6.1 VMF 1 and VMF 2 Courses).

The VMASM designation may be used only by individuals who have successfully met the requirements of the VMASM, received their certificate, and continue to renew their VMASM designation. The requirements to achieve the VMASM designation can be found in Section 2.1. VMASM Certification Requirements.

1.4.1.2. Certified Value Specialist®

The Certified Value Specialist® (CVS®) is a professional certification of SAVE International® that recognizes individuals who have demonstrated a level of knowledge and competency in the application of the Value Methodology sufficient to lead the facilitation of VM studies. “Certified Value Specialist” and “CVS” are registered trademarks of SAVE International®.

The CVS® designation may be used only by individuals who have successfully completed the requirements of the CVS, received their certification, and continue to renew their CVS® designation. The requirements to achieve the CVS® designation can be found in Section 2.2. CVS® Certification Requirements.

1.4.1.3. Certified Value Specialist®—Life

The Certified Value Specialist®—Life (CVS®-Life, CVSL) is a designation that SAVE International® granted upon request prior to June 30, 2015. The CVS-Life designation may be used only by individuals who were granted their CVS-Life prior to June 30, 2015.

1.4.1.4. Certified Value Specialist®—Retired

The Certified Value Specialist®—Retired (CVS®-Retired) is a designation of SAVE International® defined as a CVS® who is no longer actively engaged in the VM field. An individual holding a CVS® certification who desires the retired designation must request it from the SAVE business office.

Individuals designated as CVS®-Retired are expected to no longer engage in fee- or compensation-earning activities related to the Value Methodology. CVS®-Retired designees are not required to pay certification renewal fees but will continue to receive the publications of the certification program.

1.4.2. Certification Status

1.4.2.1. “In Good Standing”

The term “In Good Standing” is defined as the VMASM or CVS® who is current with all renewal requirements and renewal fees. Please refer in this manual to Section 4—Certification Renewal Requirements for details.

1.4.2.2. Expired Certifications—Usage of Credential

Individuals who allow their certification to expire or become invalid are not permitted to use the certification designation. An individual with an expired certification who continues to practice using their certification designation will be reported to the SAVE Ethics Committee for appropriate action.

1.4.3. Expired VMASM Certifications—Application for CVS®

Individuals who allow their VMASM certification to expire shall reinstate their VMASM per Section 1.5.6.1. VMASM Reinstatement prior to submitting a CVS® application.

1.4.4. Measuring Professional Development via PDUs

Professional Development Units (PDUs) are necessary for applying for CVS® certifications and renewing SAVE International® VMASM and CVS® certifications. One (1) PDU is worth one (1) hour of Value-Methodology-related practice, activities, and learning, unless otherwise indicated.

1.4.5. Failure to Meet Renewal PDU Requirements

If it is the case that an individual did not meet certification (VMASM or CVS[®]) renewal PDU requirements by their own inaction and/or rejection by the Certification Board during the renewal period preceding expiration, they must submit a “Request for Retroactive PDU Accrual” in writing within ninety (90) days following the date of certification expiration. The request must include the reasons why PDU accrual did not meet requirements. Please see Section 1.7.9., Exceptions for Hardship, for additional information.

1.4.6. Official Expiration

If an individual does not submit their renewal request for retroactive PDU accrual within ninety (90) days from the date of their certification expiration, their certification will officially expire and will be subject to policy as stated in Section 1.5.6. Certification Reinstatement Following Official Expiration. If the Certification Board rejects a Request for Retroactive PDU Accrual, a revised renewal package, or other information submitted, the individual’s certification will expire effective the date of the rejection letter and be subject to Section 1.5.6. Certification Reinstatement Following Official Expiration.

1.4.7. Certification Reinstatement Following Official Expiration

If one’s certification expires due to non-payment of certification renewal fees by their due date and/or failure to comply with renewal requirements, they must submit a renewal package to the Certification Board within ninety (90) days from the date of certification expiration. Reinstatement requires meeting the same requirements for a renewal submittal for the renewal period preceding expiration. Retroactive certification renewal fees apply.

The following subsections describe reinstatement requirements following official expiration.

1.4.7.1. VMASM Reinstatement

The following requirements must be met for an individual’s VMASM certification to be reinstated:

- VMASM certification expiration shall require the individual to pay renewal fees retroactively.
- VMASM certification that is expired for more than two (2) years shall require that the individual pay renewal fees retroactively and be required to sit for and pass the current VMASM exam for reinstatement.

The individual is reminded that they must follow the current VMASM certification renewal and professional development requirements, as outlined in Section 4—Certification Renewal Requirements.

1.4.7.2. CVS[®] Reinstatement

The following requirements must be met for an individual’s CVS[®] certification to be reinstated:

- CVS[®] certification expiration shall require the individual to pay renewal fees retroactively.

- CVS® certification expiration for more than four (4) years shall require that the individual pay renewal fees retroactively and be required to sit for and pass the current CVS® exam for reinstatement.

The individual is reminded that they must follow the current CVS® certification renewal and professional development requirements, as outlined in Section 4—Certification Renewal and Requirements.

1.4.8. Exceptions for Hardship

The Certification Board will consider renewal and expiration exceptions for hardship, including medical, familial, and other circumstances that have impacted the ability of an individual to meet certification renewal requirements and/or reinstatement request deadlines. A “Reinstatement Hardship Request” letter must be submitted to the Certification Board within one (1) year of certification expiration. “Hardship” may be defined as serious illness, injury, family emergency, natural disaster, or unavoidable catastrophic event.

From 90 days following expiration, the individual will be subject to the Expired Certifications policy until such time that the Certification Board grants an exception for hardship. The Certification Board strongly encourages individuals to submit their “Reinstatement Hardship Request” letter within 30 days following expiration to avoid official expiration.

Renewing certification is the responsibility of the individual, not the individual’s employer. An employer not supporting an individual in meeting the certification renewal requirements is not considered a hardship.

Failing to meet renewal requirements simply because one has been busy in their job or life and has not accrued required PDUs within their certification period is not considered a hardship. It is expected that certification holders will begin accruing PDUs for renewal early in their certification period, rather than procrastinating and potentially experiencing impacts to their ability to accrue PDUs for continuing education, VM service, VM promotion, etc.

1.5. SAVE International® Value Methodology Core Competencies

The Core Competencies based on the VM Guide are the minimum knowledge and skill set, acquired through VM education and experience, required to successfully apply the VM in the context of a VM study.

SAVE International® recognizes **twelve Core Competencies**, as detailed in Table 1 on the following page.

A **CVS®** is recognized by SAVE International® to have demonstrated knowledge of all components within **all 12 Core Competencies**, sufficient to lead VM studies.

A **VMASM** is recognized by SAVE International® to have demonstrated knowledge in **most, but not all**, of the **twelve core competencies**.

Table 1. SAVE International® Value Methodology Core Competencies for VMASM and CVS®

Core Competency	VMA SM	CVS®
1. Value Methodology	●	●
2. Value Methodology Job Plan	●	●
3. Preparation Phase		●
4. Information Phase	●	●
5. Function Analysis Phase	●	●
6. Creativity Phase	●	●
7. Evaluation Phase	●	●
8. Development Phase	●	●
9. Presentation Phase	●	●
10. Implementation Phase		●
11. VM Facilitation and Team Dynamics		●
12. VM Programs		●

1.6. Educational Resources

1.6.1 Prerequisite VMF 1 and VMF 2 Courses

1.6.1.1. Value Methodology Fundamentals 1

The VMF 1 course is the SAVE International® accredited course that introduces the SAVE International® VM knowledge expected of a VMASM and must be completed to sit for the VMASM exam.

1.6.1.2. Value Methodology Fundamentals 2

The VMF 2 course is the SAVE International® accredited course that introduces the SAVE International® VM knowledge expected of a CVS®, and must be completed, to sit for the CVS® exam.

1.6.1.3. Finding VMF 1 and VMF 2 Instructors

For a list of approved VMF 1 and VMF 2 instructors, see the Approved VMF 1 and VMF 2 Instructors page of the SAVE website.

1.6.2. Learn VM PDU Courses Approved by the Certification Board

1.6.2.1. For Instructors Seeking Course Approval

Instructors who have developed courses directly related to the Core Competencies may [apply for approval of PDUs](#) by the Certification Board for accreditation of courses.

1.6.2.2. For Those Seeking PDU Accrual

The Certification Board strongly encourages those applying for and/or renewing certifications to take SAVE PDU-approved courses, as they will not require detailed review and scrutiny by the Certification Board.

1.7. Protection of Proprietary Information and Intellectual Property

SAVE International® understands the importance of protecting proprietary and/or sensitive information and intellectual property on behalf of one's organization and/or clients.

For any documentation submitted to the SAVE Certification Board, specific proprietary information, such as proprietary project, product, process, service, or organizational designs or methods, is not required. Proprietary information is typically defined as not available in the public domain, subject to security considerations, or can impact the ability of a business to compete within its market.

If the documentation complies with submittal requirements, only generic information that conveys the concept is needed. Please contact certification@value-eng.org with questions prior to submittal.

Section 2—Certification Requirements

2.1. VMASM Certification Requirements

2.1.1. VMASM Certification Requirements Summary

To achieve VMASM certification, one must:

1. Complete approved VMF1A and VMF1B courses
2. Register and pay the required fee
3. Successfully pass the VMASM exam

2.1.2. VMASM Online Application Steps and Submittal

Following completion of the VMF1A and VMF1B courses, SAVE will email the VMA candidate with directions for how to complete VMASM Registration on the SAVE website.

To apply,

1. Register as directed.
2. Pay fee.

2.1.3. VMASM Processing

VMASM registration and exams are usually processed within two weeks. Payment of the appropriate application fee is mandatory. The SAVE Certification Board will not review any unpaid application. Once the application is approved, the SAVE business office will send a link to the VMASM exam.

2.2. CVS[®] Certification Requirements

2.2.1. CVS[®] Certification Requirements Summary

To achieve CVS[®] certification, one must:

1. Be a VMATM in good standing
2. Complete the VMF 2 course
3. Submit a CVS[®] application and be approved by the SAVE Certification Board to take the CVS Exam Part 1
4. Pass the CVS Exam Part 1
5. Be invited to participate in the CVS Exam Part 2
6. Pass the CVS Exam Part 2

2.2.2. CVS® Application Requirements

2.2.2.1. Practice the VM

Required PDUs = 160 (One [1] contact hour = One [1] PDU)

For the purpose of **applying for** CVS® certification, a **VM study** is the application of the following phases of the VM Job Plan: (2) Information, (3) Function Analysis, (4) Creativity, (5) Evaluation, (6) Development, and (7) Presentation to a project, product, process, service, or organization (the “study subject”) by a multidisciplinary team.

The applicant must participate in a minimum of six (6) VM studies to accrue the required 160 PDUs.

- Contact hours may be as a VM team member or co-facilitator
 - ◆ **VM team members** typically serve as subject matter experts (SMEs) and/or assist the VM facilitator in an administrative capacity, and actively participate throughout the VM study process and discussions.
 - ◆ **Co-facilitators** assist the VM facilitator by facilitating phases of the VM Job Plan during the VM study and do not serve as SME members of the VM team.
- **VM facilitators** conduct the entire VM Job Plan. Note that the VM study facilitator should supervise a VMASM as they facilitate various VM Job Plan phases during the VM study.

Credit

- **One (1) PDU is earned for every one (1) contact hour (in the in-person or virtual meeting presence of the *entire* VM team)** during the VM study. While essential to success, for the purpose of **applying for** CVS® certification, Preparation and Implementation Phase activities do not count as VM study contact hours.
- **For any one VM study, the maximum PDUs allowed is 56 and the minimum PDUs required is 24.**

CVS® applicants are expected to have actively participated in a sufficient number of VM studies that have followed the VM (i.e., application of the VM Job Plan as described in the VM Guide) and have facilitated phases of the VM Job Plan such that they are minimally qualified to lead a VM study. This goes beyond observing VM studies or participating as a VM team member.

Practicing facilitation of Function Analysis, in particular, will be the foundation for success in VM facilitation and the “live facilitation” portion of the CVS® exam requires facilitation of function analysis. The Certification Board encourages aspiring CVSs to gain VM study experience under multiple VM facilitators to learn about various facilitation styles and to recognize proper application of the VM Job Plan in alignment with the VM Guide. In addition to the VMF 1 and VMF 2, aspiring CVSs are encouraged to take Function-Analysis-focused courses prior to submitting a CVS® application.

2.2.2.2. Learn to Facilitate the VM

Required PDUs = 24 (One [1] contact hour = One [1] PDU)

The successful application of the VM requires sound facilitation skills to lead VM studies. There is a difference between understanding function analysis and eliciting functions from a VM team in a way that lets them develop their understanding of the functions of the study subject.

Of the 24 PDUs required for facilitation training, a minimum of 16 hours must be live (in-person or via live virtual meeting/Webinar). A maximum of 8 hours may be lecture capture/pre-recorded.

2.2.2.3. Communicate the VM

The applicant will be expected to concisely answer a series of questions in the CVS® Application to demonstrate their understanding of how the VM is applied to meet the goals of organizations and clients.

2.2.3. CVS® Online Application Steps and Submittal

2.2.3.1. Practice the VM Submittal Requirements

When completing the CVS® Application, include more than six (6) VM workshop examples only if needed to achieve a total of 160 PDUs.

A minimum of six (6) VM study examples are required and maximum of ten (10) VM study examples are allowed. Any additional examples claiming PDUs that exceed the PDU requirement will not be considered by the Certification Board.

SAVE International® reserves the right to contact each VM study sponsor to verify that the requirements for each VM study were met (i.e., application of the VM Job Plan was followed as described in the VM Guide). List only examples for which all of phases two through seven of the VM Job Plan were applied.

Applicants are encouraged to contact certification@value-eng.org to discuss any questions they may have about the application process prior to submittal of their CVS® Application.

2.2.3.2. Learn to Facilitate the VM Submittal Requirements

A minimum of 16 of the 24 hours required must be live (in-person or via live virtual meeting/Webinar). A maximum of 8 hours may be lecture capture/pre-recorded.

In addition to the specifics requested as part of the CVS® Application Summary Workbook, supplemental documentation is required for each facilitation course:

1. Course documentation: syllabus/schedule/agenda indicating the title of the course and duration of the live and/or lecture-capture training.
2. Course completion certificate

3. Core Competency relevance: a one-paragraph description of which of the Core Competency #11 subcategories were covered, and how it will aid the applicant in facilitating the VM.

2.2.3.3. Communicate the VM Submittal Requirements

For **one (1) of the VM studies** the applicant submits under Section 2.2.4.1. Practice the Value Methodology, the applicant will answer the following questions. Space is provided within the response cell to allow the maximum number of characters allowed. For Question 8 the answer must be 1,000 characters (with spaces) or less. The answers for all other questions must be 600 characters (with spaces) or less.

It is recommended to first, enter responses in MS Word and use MS Word's "Word Count" function in the Review tab to verify your responses do not exceed the character limits. Then, copy-and-paste into the application. Responses that exceed the respective limits for any question will result in failure of the Communicate the Value Methodology requirement, requiring editing and resubmittal.

Questions

1. Describe the scope of the study subject (project, product, process, organization, or service).
2. Describe the purpose and the need it was intended to fulfill. How were these articulated as functions?
3. Describe a significant risk, issue, or challenge it faced.
4. Describe the VM Study sponsor's goals and objectives for the VM Study.
5. Describe an analysis technique (see examples in Section 5.1 of the VM Guide) that was used to transform information relative to the risk, issue, or challenge.
6. Describe what the analysis technique revealed and how it helped focus the VM Study.
7. Identify three of the functions that yielded creative ideas. For one of these functions, describe why it was prioritized for brainstorming to improve value in terms of performance, cost, risk, and/or time.
8. Describe the one idea that, when developed, resulted in the greatest value improvement. Under which function was it brainstormed? How did it mitigate the risk, issue, or challenge identified above? In what ways did it improve performance, reduce cost, and/or optimize time?
9. Describe how the VM study met the VM study sponsor's goals.

Demonstrate Understanding

For the VM Studies submitted, the applicant must demonstrate their understanding of

- Study subject purpose and need relative to basic and higher-order functions
- How the transformation of information related to risks, issues, or challenges faced by the customer helped focus the VM study
- Strong functions that yielded value during the Creativity Phase

- How brainstorming on one of those functions generated an innovative idea that performed the function in a way that supported customer goals and addressed the risks, issues, or challenges

Evaluation Criteria

The answers will be graded according to the evaluation criteria, weighted as indicated below. **The applicant is required to achieve a score of 70 percent or more in this section of the application to be approved to sit for the CVS® exam.**

Table 2. Communicate the VM—Evaluation Criteria

Criterion	Weight
Stimulate Interest (in the project, product, process, organization, or service)	15%
Demonstrate Value Improvement (specific to the VM study subject through application of VM)	25%
Communicate Achievement (specific to study sponsor goals)	15%
Avoid Regurgitation (of generic VM concepts and benefits)	15%
Enhance Understanding (through compelling content, concise writing style, and correct grammar, punctuation, etc.)	15%
Meet Requirements (addresses each question)	15%

Note: If the applicant receives a score of less than 70 percent, they will be required to submit answers for a **different** VM Study from among those listed in 2.2.4.1 Practice the VM Submittal.

Tip for Success

Prior to submitting one's application, it is recommended that the applicant take time to develop and refine their answers to the questions—carefully editing them to concisely demonstrate their understanding while meeting the evaluation criteria.

2.2.3.4. CVS® Application Steps and Submittal

The application package shall be organized as shown below (items E.1 through E.5), including the requested submittal documentation within each subsection, as previously described. CVS® applications shall be submitted in the English language.

To apply,

- Be a VMASM in good standing.
- Complete VMF 2 course.
- Register on the [SAVE CVS® Application webpage](#).
- Pay fee via registration webpage.

- **Submit application package.** It shall be submitted electronically in a single PDF file (10 MB or less) via the SAVE CVS® Application webpage and be organized as follows. The PDF File shall be bookmarked to identify each section and subsection outlined below.
 1. Signed and dated CVS® Application, including answers to questions detailed in Section 2.2.4.3. Communicate the Value Methodology Submittal Requirements.
 2. Current VMASM Certificate
 3. VMF 2 Certificate of Completion, including dates, course license number, and instructor signature of CVS® holding course license
 4. Learn to Facilitate documentation: for each course submitted, provide
 - a. Course Certificate
 - b. Course syllabus/schedule/agenda
 - c. Course Relevancy Paragraph

2.2.4. CVS® Application Approval Process—Tips for Reducing Review Time

- **Thoroughly study this manual.** It is the applicant's responsibility to understand the certification requirements provided herein. If you cannot find the information you need in this manual, email certification@value-eng.org.
- **Submit a responsive application package.** Organize your application exactly as described in the previous section.
- **Know the requirements.** Study the PDU requirements and the submittal requirements for each category of PDUs you plan to claim—long before submitting the application—so that you can strategize your path toward certification.
- **Inventory your PDU documentation.** Verify that your application submittal documentation covers all PDUs claimed.

2.2.4.2. CVS® Application Approval

Providing that all application documentation has been submitted as required, the average time from submission to approval is approximately one month. This is required to afford the Certification Board time to objectively and thoroughly review an application, and to contact VM study sponsors, as applicable.

After an application is approved, the SAVE Certification Board will notify the applicant of their eligibility to sit for the exam.

2.2.4.3. CVS® Application Rejection

If, during the application review process, problems such as missing and/or incorrect information are discovered, the applicant will be notified by the SAVE business office. The Certification Board will provide specific feedback on the application deficiencies and request information as applicable

Applicants are strongly encouraged to contact the Certification Board via certification@value-eng.org if they have questions about how to be responsive to the request.

2.2.4.4. CVS® Application7—Submittal(s) Following Rejection

For subsequent submittal following Rejection, applicants shall only provide the information requested by the Certification Board following the previous submittal.

Should the applicant fail the Communicate the Value Methodology requirement and resubmit their application, a *different* VM study example from among those originally submitted under Section 2.2.4.1 Practice the Value Methodology must be used to answer the questions.

The applicant will have thirty (30) days to submit requested information and/or corrected portions.

2.2.4.5. CVS® Application Termination

Applicants who fail to respond within 30 days will be notified by the SAVE business office that their failure to respond results in the termination of the application.

If a CVS® applicant's third submittal of their application is rejected, their application is therefore terminated.

CVS® applicants whose applications have been terminated may not reapply for a period of six (6) months following the date of application termination.

If one's application is terminated, they may contact the SAVE Certification Board via email at certification@value-eng.org to request an appeal hearing.

Section 3—Examinations

3.1. Purpose

The purpose of the VMASM and CVS[®] examinations is to test the applicant's knowledge of and ability to apply the Core Competencies and the content of the [VM Guide](#) at the competence level appropriate for the given certification.

3.1.1. VMASM Exam

The VMASM exam tests on the subcategories indicated for the VMASM on the Core Competencies document and the related content in the VM Guide. If the exam is failed, the examinee will need to retake the entire exam.

3.1.2. CVS[®] Exam

The CVS[®] Exam is focused on the subcategories indicated for the CVS[®] on the Core Competencies document and the related content in the VM Guide. The CVS[®] exam is composed of two parts as described below.

3.1.2.1. Part 1—Online CVS[®] Exam

The online CVS[®] exam includes some questions that require application of Core Competencies covered in the VMASM exam, as it is expected that the examinee's experience gained through participation in VM studies will expand on their understanding. If a large amount of time has elapsed between sitting for the VMASM exam and the CVS[®] exam, it is strongly recommended to review VM Guide sections applicable to both the VMASM and the CVS[®] exams prior to sitting for the CVS[®] exam.

If the online exam is failed, the examinee would need to retake the entire online exam.

3.2.2.2. Part 2—Live Function Analysis Facilitation CVS[®] Examination

Once a CVS[®] examinee passes the online exam (Part 1), they may proceed to the live Function Analysis Facilitation portion of the exam (Part 2). The examination may be conducted in person or via a virtual meeting platform. It will be scheduled based on the number of candidates to be evaluated, and the availability of the Examination Panel. The Certification Board will appoint a minimum of three (3) members of the Examination Panel (a.k.a. Assessors).

As preparation for the Facilitation Event, the candidate will be asked to select a VM study topic from a list provided and will be given instructions about preparing for the demonstration. The candidate will then design a 60-minute (maximum) facilitation meant to deliver a result relevant to their selected topic; they will facilitate a group of five to seven VM team members comprising other candidates being assessed that day and/or some members of the examination panel. Assessors will observe and evaluate the demonstration, and the candidate will be expected to exhibit their capability to facilitate the session

they have designed to a successful conclusion. At the conclusion of the Facilitation Event, each candidate is provided with their Certification Result: Pass, Defer, or Fail.

In the case of multiple candidates taking the facilitation exam on the same day, the Facilitation Event begins with a Candidate Briefing meant to orient the candidates to the venue, introduce them to their Assessors and other candidates, and provide them with a schedule for the day. The candidate then formally begins their Facilitation Event activities.

Evaluation criteria for the live Function Analysis Facilitation Examination include the following:

- General facilitation skills, including how to deal with interruptions/distractions
- Ability to elicit functions from the group
- Ability to obtain participation by all or a majority of group participants
- Quality of final outcome of the facilitated session

After all candidates have completed their facilitation exams, Assessors may interview the candidates individually, seeking any final evidence necessary to confirm the Certification Result. The Final Interview is no more than thirty minutes in length but may be less if all necessary evidence has been gathered through the prior activities. If sufficient evidence is not collected by the Assessors by the end of the Final Interview, the Certification Result will be “defer.”

If a sole candidate is being evaluated, they should plan on a minimum of 90 to 120 minutes for the total process. In the case of multiple candidates at the same event, the time required may be from 3 hours to 8 hours, depending upon the number of candidates being evaluated.

3.2. Online Examination Format and Rules

3.2.1. Online Examination Format

Exams are offered in the English language.

All questions for the online exams are multiple choice or similar and the exams are timed. Examinees are given instructions and time to get familiar with the exam format. A live proctor monitors examinee activities and behaviors via webcam and monitors the examinee’s computer screen live to verify adherence to examination rules.

3.2.2. Online Examination Equipment, Software, and ID Requirements

Examinees will need a computer with a functioning webcam and reliable Internet connection. Details will be provided to the examinee from the testing company. Photo identification, such as a driver’s license or passport, is required.

3.2.3. Online Examination Rules

The testing company will provide the instructions and requirements for the examination. **No reference material shall be present.**

3.2.4. Penalty for Rule Infraction

Indications of infraction will be recorded and reviewed. If proof is found of rule infraction, the examination will be null and void, regardless of the grade received. The examinee will be required to pay the examination fee to retake the exam.

If proof of rule infraction on an examination is found a second time for a given examinee, the individual will be barred from SAVE International® examinations and certification.

3.2.5. Examination Scheduling

Upon SAVE approval to sit for the VMASM or CVS® examination, the SAVE business office will provide examinees a link to the website with a single-use approval code, where individuals will submit their application fee payment. The examinee may then sit for the exam at any time or date that is convenient for the examinee—the exam may be taken immediately after submitting payment or may be taken later.

3.2.6. Time Allowed to Sit for Exams

Be sure to allow time to sign in for the exam and thoroughly read the directions and rules. This takes about 15-20 minutes and is not part of the time allowed to answer the questions.

- The time to answer VMASM exam questions is 90 minutes.
- The time to answer CVS® exam questions is TBD hours.

3.2.7. Examination Results

If a VMASM or CVS® examinee fails an exam, they may retake the exam up to three times within a one-year period. After the third failure, the CVS® applicant must reapply.

3.3. Examination Retakes

3.3.1. VMASM Examination Retakes

An approved VMASM candidate may retake the exam up to three times within a one-year period. After the third failure, the VMA candidate must wait 6 months and pay a new exam fee prior to retaking the VMA exam. It is recommended that candidates thoroughly review the VM Guide and VMF 1 course materials prior to retaking the exam.

3.3.2. CVS® Examination Retakes

3.3.2.1. CVS® Exam Part 1 Retakes

An approved CVS® candidate may retake the exam up to three times within a one-year period. After the third failure, the CVS® applicant must submit a new CVS application including the CVS application fee. It is recommended that candidates thoroughly review the VM Guide and VMF 2 course materials prior to sitting for exam retakes.

3.3.2.2. CVS® Exam Part 2 Retakes

Well in advance of taking Part 2 of the CVS® exam, it is strongly encouraged that candidates complete “live” Function-Analysis-specific coursework that is aligned with the VM Guide—in addition to the VMF 2. Additionally, practicing Function Analysis with a study group is encouraged. It can be beneficial to practice with CVSs and aspiring CVSs with whom the candidate is unfamiliar. Gaining fresh perspectives from a wide variety of VM practitioners who apply the VM in alignment with the VM Guide is beneficial to CVS® candidates and experienced CVS alike. Receiving constructive feedback regarding areas of Function Analysis facilitation needing improvement is also beneficial. Competent facilitation of Function Analysis requires practicing good techniques.

Sitting for Part 2 of the CVS® exam is a resource-intensive effort on the part of all participants—the Examination Assessors, Examination Panel, and fellow candidates/VM team members all volunteer their time to support candidates.

An approved CVS® candidate may **retake Part 2** of the CVS® exam a maximum of **one (1) time** during the calendar year following their original Part 2 exam date. A CVS® candidate who **fails Part 2 a second (2nd) time** will be required to wait one calendar year following the second failure prior to sitting for the exam a third time. A CVS® candidate who **fails Part 2 a third (3rd) time** will be required to wait one calendar year following the third failure prior to sitting for the exam a third time. The calendar year wait time applies to any additional failures.

In addition to using resources wisely, the time between exams is intended to be used by the candidate to gain additional experience, feedback, etc. to improve their skills prior to sitting for the exam again.

Candidates will be rescheduled on a first-come basis, among all other candidates getting scheduled, with no special consideration for “retake” status.

Section 4—Certification Renewal Requirements

4.2. Certification Renewal

4.2.1. Introduction to Renewal

Renewal-related professional development is reflected in continuing VM activities, continuing VM education, VM society service, and VM promotion. Professional development units (PDUs) measure these activities.

4.2.2. Renewal Period

All persons holding a CVS® certification must pay renewal fees and accrue the required number of PDUs for their level of certification during their renewal period. The CVS® certification renewal interval is four (4) years.

All persons holding a VMASM certification must pay renewal fees and accrue the required number of PDUs for their level of certification during their renewal period. The VMASM certification renewal interval is two (2) years.

Only PDUs accrued during the renewal period are credited for that renewal period.

4.2.3. Renewal Procedure and Requirements

Prior to the end of each renewal period, SAVE International® will email the VMASM or CVS® an invoice for renewal fees. The email will contain a link to SAVE's online fee payment and affidavit webpage, wherein the certification holder will attest that they have completed the required PDUs during their renewal period.

It is the certification holder's responsibility to keep their certification current. Continuing to use certification designation once it has expired is a breach of ethical conduct. See Section 1.5.2.2. Expired Certifications—Usage of Credential for additional information.

4.3. PDU Requirements for Renewal

4.3.1. VMASM Renewal Requirements

To retain active status, during each of their renewal periods a VMASM must

- accrue eight (8) "Learn VM" PDUs
- Pay certification renewal fees

VM education (Learn VM) PDUs are accrued through:

- VM society conferences

- VM courses approved by the SAVE International® Certification Board for PDUs SAVE International® e-learning courses
- Other VM-related courses: Examples include (but are not limited to) in-person, webinar, or e-learning courses on the subjects of function analysis, creativity, team building, facilitation, cost estimating and costing methods, project management training, presentation skills, and courses that directly relate to the Core Competencies.

4.3.2. CVS® Renewal Requirements

4.3.2.1. VM Activities

Required PDUs = 160 (One [1] contact hour = One [1] PDU)

A minimum of 160 PDUs are required during the renewal period for VM Activities in **one or more** of the following areas:

4.3.2.1.1. Participate in VM Studies

Participation includes facilitating VM studies or serving as a VM team member in VM Studies.

VM Studies include **all eight (8) phases of the VM Job Plan**: pre-workshop preparation, VM workshop, post-workshop report development, and implementation activities as described in VM Guide Section 11.0 Implementation Phase.

4.3.2.1.2. Manage VM Programs

Activities include managing and coordinating VM studies; writing and/or administering VM policies and guidance; and managing VM contracts and task orders. VM program managers are individuals who are employed within an organization that has a VM program for its own projects, products, processes, services, and/or organizations.

It is understood that VM program managers may serve in multiple roles within their organizations. For example, the same employee may provide cost estimating or cost analysis three-quarters ($\frac{3}{4}$) of the time and may manage their organization's VM program one-quarter ($\frac{1}{4}$) of the time. If that employee is employed full-time (2,080 hours per calendar year), it would mean they managed the VM program 520 hours during that calendar year. That employee would need less than 4 months to satisfy the 160-PDU requirement.

Credit will not be given for employment within a private consulting firm or company that provides VM consulting for clients outside its organization.

4.3.2.1.3. Teach VM

Activities include teaching VM courses in-person or via live virtual meeting/Webinar (including at an institute of higher learning); developing VM courses; and developing VM training or educational materials.

If a course or training is developed to be delivered in a lecture-capture/pre-recorded format, only its development may be credited toward PDU accrual.

4.3.3.2. Learn VM

Required PDUs = 56 (One [1] contact hour = One [1] PDU)

A minimum of 56 PDUs, which must be accrued through continuing education, are required for Learn VM, including 8 PDUs in live Function Analysis training and 8 PDUs in live facilitation training.

Learn VM PDUs may be accrued through the following:

- **VM society conference sessions.** Participation in the SAVE Value Summit, SAVE Affiliate conferences, or other Value-Methodology-related conferences that include function analysis, creativity, team building, cost estimating and costing methods, project management training, presentation skills, and/or courses that directly relate to the SAVE International® Value Methodology Core Competencies. Participation includes attending pre-conference courses as well as attending conference sessions.
- **Courses approved by the SAVE International® Certification Board for PDUs.**
- **VM-related courses.** Examples include (but are not limited to) in-person, live virtual, webinar, or e-learning courses on function analysis, creativity, team building, cost estimating and costing methods, project management training, presentation skills, and courses that directly relate to the SAVE International® Value Methodology Core Competencies.
- **Function Analysis training.** Function Analysis training must cover any one or a combination of the Core Competencies Function Analysis subcategories.
- **Facilitation training.** Facilitation training must cover a minimum of one (1) of the subcategories of Core Competency #11, VM Facilitation and Team Dynamics.
- **SAVE International® E-Learning Courses.**
- **Attendance at VM Society Chapter Meetings.**

4.3.3.3. VM Society Service and VM Promotion

Required PDUs = 16

A minimum of 16 PDUs must be accrued for VM society service and VM promotion.

4.3.3.3.1. VM Society Service

PDUs may be claimed for service in VM societies recognized by SAVE International® including, but not limited to, affiliates of SAVE International® and organizations that have intersociety agreements with SAVE International®.

- VM Society Board Member (National) or SAVE Certification Board Member: 10 PDUs Per Year
- SAVE International® Chapter President or Other VM Society President: 8 PDUs Per Year

- VM Society Committee Member (National), SAVE International® Chapter Officer, or Miles Value Foundation (MVF) Board Member: 4 PDUs Per Year
- VM Society Membership: 1 PDU Per Organization per Year, with a maximum of two (2) organizations per year

4.3.3.3.2. VM Promotion

- VM presentations, minimum 1 hour: 1 PDU per presentation
- Conference session presenter, instructor, or conference forum moderator: 1 PDU per session or forum
- Publish papers and/or articles, minimum 500 words: 1 PDU per article
- Teach VMF 1 or VMF 2 course: 2 PDUs per course

4.3.3.3.3. CVS® Exam Part 2 Volunteer

Administering the CVS® Exam Part 2 requires VM team members to be facilitated by each candidate. It also requires panelists to observe the facilitation. CVSs who participate as VM team members or panelists will be credited 1 PDU per hour of participation.

4.4. VMASM and CVS® Renewal Audits

SAVE International® reserves the right to request more information and/or documentation to support a candidate's renewal for VMASM or CVS® certification.

Section 5—Collaboration With National Value Associations of Europe

Requirements for PVM Recognition as CVS®

A collaborative agreement exists between SAVE International® and the national value associations of Europe, represented by the Value for Europe (V4E) board, to protect basic value concepts developed from the principles established by L. D. Miles, and to build on these by sharing knowledge and experience. The following describes the requirements of a qualified Professional in Value Management (PVM) submitting an application to become recognized as a Certified Value Specialist® (CVS®). The duration of CVS® certification shall be four years from the date of approval. Once certification is achieved, the candidate shall apply for recertification through the SAVE Certification Board and follow the requirements for recertification.

1. **A valid PVM Certificate.**
2. **Endorsement:** A member of the V4E or, by delegation, the chairperson of the National Certification Organization (NCO) of the country of the applicant, shall submit an endorsement of the applicant. To overcome the question of validating the applicant's information, we must trust in the professional discretion of the candidate and the endorser for that candidate. However, this does not preclude the right of the SAVE Certification Board to spot audit any information presented in the application.
3. **A completed and SAVE Certification Board-approved professional experience log:** All assignments logged must be those that follow the basic VM job plan phases that include information, function analysis, creativity, 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.
 - a. **Date:** This is the beginning date of each VM study assignment. Earliest assignment date shall be four years (or less) from the date of the application.
 - b. **Client Company:** This is the name of the client for whom the applicant performed the VM study assignment.
 - c. **VM Project Description:** State the nature, title, or a short description of the VM study assignment.
 - d. **Total Event Hours:** State the total elapsed time of the VM study assignment.
 - e. **Total Contact Hours:** State the number of hours that the full VM study team was engaged in performing the VM study assignment. This excludes any planning activities or pre-event meetings that do not include the full VM study team.
 - f. **Total number of hours required:** 160 PDUs—minimum 6 studies.
 - g. **Total facilitator hours:** State the total number of hours that the applicant served as lead or co-facilitator for that project.

- h. **Notes:** Add **any** notes that would assist the CVS® evaluators in understanding compliance with application requirements.
 - i. **FAST Models:** The FAST diagrams can reflect the classic, technical, or customer FAST techniques. A minimum of two FAST diagrams created for the above assignments, and for which the applicant was the lead or co-facilitator, are required.

Note: Function trees may be accepted as a variation of the customer FAST if it clearly shows a function hierarchy and is consistent with the SAVE International® Value Methodology.
4. **Biography or Résumé:** Include a short (1 to 1½ pages) description of the applicant’s professional history. This should include academic accreditation, other certifications, publications, honors and awards.
5. **Application Fee:** The fee shall be as prescribed in the current fee structure for “CVS® applicant.”