

# 2020 VIRTUAL Value Summit

## Preliminary Agenda\*

*(Please note, all times are in Pacific Standard Time)*

### Friday, June 5, 2020

8:00 AM – 12:30 PM

#### PRE-SUMMIT WORKSHOP

##### **Effective Facilitation (Part 1)**

Instructor: John Sloggy, PE, CVS® (Value Based Design)

PDUs: 3.75 hours / 7.5 total hours

Core Competency: Team Facilitation

This workshop is a mixture of lecture and team practice exercises utilizing the Pocket Guide: Facilitation as a Glance by Ingrid Bens as a source of workshop material (provided). We cover the following facilitation core competencies during the workshop:

- Understanding Facilitation
- Effective Questioning
- Facilitation Stages

### Saturday, June 6, 2020

8:00 AM – 5:00 PM

#### PRE-SUMMIT WORKSHOPS

##### **ABDs of Advanced Value Engineering – Day 1**

Instructors: Frank Vicidomina, PE, CVS-Life and Jeff Rude, CVS® (Value Management Strategies, Inc.)

PDUs: 7.5 hours / 15 hours total

Core Competencies:

- Value Methodology
- Transform Information

- Team Facilitation
- Function Analysis
- Cost Analysis
- Pre-Workshop Stage
- Workshop Stage (Six-Phase VM Job Plan)
- Post-Workshop Stage
- Value Program

The Value Engineering (VE) practitioner's goal should be to best take care of his CUSTOMER via finding 'D' – the 'diamond in the rough' better solution for a given project or process. This can be accomplished by optimal execution of the VE Job Plan. To that end the objective of this course/book is to help improve the VE professional's skills via the sharing of the author's experience and input from course participants. This course addresses functionality and 100 issues associated with the Pre-Workshop, six-phase VE Job Plan and Post-Workshop activities as well as various select 'odds and ends'. The book presents the subject matter training but is also good as an independent, stand-alone learning document.

If you're looking for the latest gee-wiz technologies, etc., there will be some of that. The primary focus of this course, however, is on reiterating what VE should be, identifying issues and offering advice on how to improve preparing for, conducting and documenting VE workshops. The book/course is aimed at the experienced VE practitioner but should also be helpful for those new to the profession. VE program managers may also benefit from this course via gaining insight to what their VE practitioners should be doing for them.

8:00 AM – 12:30 PM

### ***Effective Facilitation (Part 2)***

Instructor: John Sloggy, PE, CVS® (Value Based Design)

PDU: 3.75 hours / 7.5 total hours

Core Competency: Team Facilitation

## **Sunday, June 7, 2020**

8:00 AM – 5:00 PM

### **PRE-SUMMIT WORKSHOP**

#### ***ABDs of Advanced Value Engineering – Day 2***

Instructors: Frank Vicidomina, PE, CVS-Life and Jeff Rude, CVS® (Value Management Strategies, Inc.)

PDU: 7.5 hours / 15 hours total

#### ***Beyond FAST - Applying 21st Century Function Models, Tools and Techniques***

Instructors: Bruce Lenzer, CVS-Life, FSAVE, CQM/OE, CLA, CAQMSA (Synergy Value Solutions, LLC) and James McCuish (Pinnacle Results LLC)

PDU: 7.5 hours

Core Competencies:

- Team Facilitation
- Function Analysis

This class/seminar covers 21st century function modeling tools and techniques to optimize and value improve products, projects, and processes. Successful Improvement Teams' delivery has become more complex and demanding in a volatile environment of ever tighter margins that involve a spectra of risks to consider. A variety of risks which matter can be identified and represented in the context of one or more of these function models.

This Full day class including example exercises, is designed for all practitioners of value engineering, optimization, quality, as well as process and project improvement desiring to learn more regarding different types and styles of Function Modeling and innovative applications of Function Analysis System Technique (FAST). Participants will be introduced to intermediate and advanced fundamentals of function science, interfacing business processes, organizations, and optimizing project delivery with FAST models. In addition, contemporary tools will be shared in building Process Cost Models.

Innovations to model cost will be shared and explained, interfacing labor and materials cost to simulate as-is and to-be changes surrounding a proposed improvement. Interfacing these components of cost to function broadens the analytical capability for value, quality, process and project improvement practitioners in government and industry.

The class will also explain and conduct practice exercises addressing Organization Function FAST associated with Project Planning, Schedule Optimization and Change Management. Organizational FAST is a pragmatic application of the FAST tool which provides characterization and visualization so Project Teams and Management can agree on the way forward and resources required to achieve organizational success. Organizational FAST also provides a simple, yet elegant, method to drive down the detail of the Organizational Functions to be achieved in the System.

It exhibits the interfaces and dependencies with clarity as well as differentiates the “As we do it state” from the “As we should do it state.” In addition, it supports assignment of Roles & Accountabilities. A tangible graphic representation helps prove the understandings developed in the Teams’ System Thinking work does exist, and which will be referenced in a consistent and repeatable business process. The graphic representation also serves as a reference point for discussions with new team members, other internal Organizations, Clients, & Contractors. These Organizational Maps may be “dimensioned” in a variety of ways to leverage additional enhancements adding to the understanding of value between the project teams, customers and clients.

## Monday, June 8, 2020

7:30 AM – 8:00 AM

### PLENARY

Renee Hoekstra, CVS®  
SAVE International President

8:00 AM – 10:00 AM

### BLOCK 1 (TRANSPORTATION TRACK)

8:00 AM

#### ***Base Uncertainty in Cost Estimating and the Implications in Value Engineering***

Presenters: Ovidiu Cretu, PhD, PE (HNTB Corporation); Grace Olaley (HNTB Corporation)

PDU: 0.5 Hours

Core Competency: Function Analysis

Inaccurate estimating has dogged the transportation industry for years. In the past decade or so, many state department of transportation agencies have embraced risk based estimating and more are examining this tool. The fact that estimates are more correctly expressed as a range rather than a single number is aided by a full understanding of risk and uncertainty. Value Engineering practitioners can benefit from understanding how uncertainty in cost estimates in particular can be captured, expressed and considered. Even if no risks are present there is uncertainty in the project cost estimate and in the Value Engineering recommendations developed. This is not a cause for concern but rather a fact to be integrated into the Value Engineering job plan and deliverables.

The Information phase should include information about project cost and schedule estimates and the uncertainty associated with the estimates. During the Evaluation and Development phases the uncertainty associated with ideas and recommendations should be captured. Finally, in the presentation

phase the uncertainty associated with recommendations should be communicated. How is this done?  
Using ranges rather than single numbers.

8:30 AM ***Risk Analysis Details and Options for Use in Establishing Contingencies***  
Presenter: Ovidiu Cretu, PhD, PE (HNTB Corporation); Grace Olaleye (HNTB Corporation)  
PDUs: 0.5 Hours  
Core Competency: Function Analysis

Use of risk-based estimating to inform decisions on contingencies.

9:00am ***FHWA - Risk from FHWA perspective and use of Value Engineering in project delivery; Probabilistic Risk Based Estimating***  
Presenter: Pete Garcia (Federal Highway Administration)  
PDUs: 0.5 Hours  
Core Competency: Value Program

This presentation will touch on how the risk based approach is used within FHWA working with State DOT stakeholders implementing federal-aid projects and using VE during project development, and ends with a note on how FHWA is responding to a growing desire by State DOTs for better estimates, for which FHWA is currently developing tools and training – Probabilistic Risk Based Estimating. The learning objective for the presentation is to give industry better client insight as well as inspire practitioners to find clients emerging needs and desires (gaps) in order to present opportunities to promote the Value Methodology beyond just projects.

9:30 AM ***Baseline – Confirming Interchange VE Study Yields \$11M Cost Savings***  
Presenter: Warren Knoles, PE, CVS® (Crawford, Murphy & Tilly)  
PDUs: 0.5 Hours  
Core Competency: Transform Information

Following five years of preliminary engineering, environmental studies, and public involvement, the Illinois Department of Transportation (IDOT) commissioned a value engineering (VE) study on the resulting Phase I (30%) conceptual design for the replacement of the 1960s-vintage, Interstate 74 (I-74), cloverleaf interchange with a diverging-diamond interchange (DDI). The author and the study team anticipated the likelihood of several viable VE proposals that would improve the baseline design concept. Surprisingly, the VE study resulted in confirmation of the baseline DDI design concept as the optimum design solution. However, the VE team identified 11 viable VE proposals of which six were accepted for implementation totaling \$11 million (15%) in construction cost savings. This paper briefly describes how the VE study team applied the value methodology to the baseline project, the resulting six accepted VE proposals, and several “lessons learned” that emerged from the study. This paper affirms the effectiveness of the VE methodology in reducing project costs on transportation projects and enhancing their value.

10:00 AM – 10:30 AM **BREAK / VIRTUAL CHAT ROOM**

10:30 AM – 12:30 PM **BLOCK 2 (TRANSPORTATION TRACK)**

10:30 AM ***Modern Unit Price Visualization and Estimating Tool for Highway Agencies***  
Presenters: K. Joseph Shrestha, PhD (East Tennessee State University) and  
H. David Jeong, PhD (Texas A & M University)  
PDUs – 0.5 Hours  
Core Competency: Function Analysis

Cost estimating is one of the most important and challenging tasks for highway construction project owners. Reliable accuracy of an engineer’s estimate is desired to ensure the optimum utilization of an available budget for a highway agency. In the past and still today, state highway agencies have heavily used an estimator’s experience and judgment to produce an engineer’s estimate. While a human brain

may be able to account for a few factors simultaneously that may affect the cost of a work item, efficient evaluation and consideration of various spatial factors and quantity factors on the costs of many work items in the ever-growing amount of historical project cost data is almost impossible for a human being to cognitively handle. This presentation will discuss a recent study conducted on historical bid data available in California Department of Transportation (Caltrans). In this study, a computational algorithm was developed to automatically evaluate and quantify the effect of a project's location and the quantity of a work item and visualize the results on a computer screen for effective communication with the estimator. An add-in tool for Environmental Systems Research Institute (ESRI) ArcGIS software was first developed and later, a 100% web-based tool was developed to make it free from the dependency on a commercial software program. The web-based tool, namely, Unit Price Visualization and Estimating Tool (UPVET) can provide a visual overview of the statewide construction market conditions and is able to estimate the unit price of a bid item at various locations in the state of California based on historical unit price data. It is based on the Tobler's First Law of Geography that states that the points closer together in space are more likely to have a similar value than points farther away. The tool is able to filter the historical bid items by quantities and bid year as well before producing estimates to provide more granular and reliable adjustments to the estimated unit prices. The tool is expected to enable estimators to generate estimates with higher certainty. The presentation will demonstrate the UPVET to showcase the power of the tool.

11:00 AM

***Risk Management and Allocation in Design-Build for Transportation Projects***

Presenter: Mark Gabel, MSCE, PE, CVS® (Washington State Department of Transportation)

PDU's – 0.5 Hours / Core Competency: Function Analysis

The ever-increasing need to fully understand and communicate project information to contract parties (owner and design-builder) as well as diverse audiences and communities continues to be a challenge. In addition, design teams, working with multiple and varied partners and internal specialists, need to be able to quickly grasp the nature of a project, its context, risk and work activities. Project risk management methods are fairly well established and continue to evolve. Through the project design and development process there can be overwhelming amounts of data for large projects, which can be cumbersome and confusing to interpret. The need for identifying risk ownership is heightened for the design-build delivery method. There must be an agreement by all parties as to who owns each risk, typically classified as: owner risk, design-builder risk, or shared risk.

Value Engineering offers a natural method for cutting through the chaos and decision angst by identifying functions and responding to issues of greatest import. Value Engineering, when combined with risk management, produces a prominent benefit of identifying risk owners. Value Engineering is useful during pre-procurement and offers opportunities to improve the Request for Qualifications and Request for Proposal processes.

11:30 AM

***Building a VE Program - Oregon DOT***

Presenter: Zach Davis (Oregon Department of Transportation)

PDU's: 0.5 Hours

Core Competency: Value Program

The ODOT Statewide Project Development Section sponsored a Project Risk Management/Value Engineering/Constructability Review Task Force charged with submitting a formal whitepaper with recommendations for leading the agency toward improved implementation of project risk management, value engineering and constructability reviews for project delivery. This paper deals with this effort.

12:00 PM

***Considering Cognitive Bias in Value Engineering Studies***

Presenter: Mark Sujka (Washington State Department of Transportation)

PDU's: 0.5 Hours

Core Competency: Team Facilitation

A recent Virtual PM Challenge explored the importance of raising awareness of cognitive bias in engineering decision-making and limiting its impact on NASA projects.

Raising awareness of cognitive bias is an effective first step in reducing cognitive bias in project decision-making. The professional Value Engineering leader is looked to as an objective guide in project review and examination. Objectivity of the VE Leader is enhanced and validated when they guard against their own cognitive biases and help others recognize and avoid cognitive bias.

How cognitive biases emerge and how to proactively inoculate the VE study against them is explored in the paper and presentation.

12:30 PM – 1:00 PM

### **BREAK / VIRTUAL CHAT ROOM**

1:00 PM – 2:00 PM

### **Professional Development Session: VM Report Training**

Presenter: Laurie Dennis, CVS-Life, PE

**PDU: 1.0 hours**

**Core Competency: Post-Workshop Stage**

The Value Engineer (VE) report is often overlooked during value training with little or no guidance for the future value practitioner and as an afterthought by some value practitioners. However, the VE report lives beyond the workshop in the files of the clients and users of those value studies. When a project or product has budget or schedule issues or concerns, one of the first documents management reaches for is the VE report.

For many clients, the VE report becomes the primary marketing tool for future value studies and maintenance of their value program. In addition, the quality of many of these reports reflect the lack of focus and reflects poorly on the value community.

The purpose of this session is to give the attendees, owners, users and practitioners, input, tools and techniques to improve the quality of the VE report and discuss opportunities for improvement in the future.

2:00 PM – 3:30 PM

### **BLOCK 3 (TRANSPORTATION TRACK)**

2:00 PM

#### ***Utilizing a Modified Function Value Resource Matrix in Transportation Projects***

Presenter: Thomasa W. Hume, CVS® (Washington State Department of Transportation)

**PDU: 0.5 Hours**

**Core Competency: Workshop Stage (Six-Phase VM Job Plan)**

An important but often omitted step in value analysis is application of the “Function Value Resource Matrix”. The “Function Value Resource Matrix” provides a discernible key in demonstrating the most advantageous functions for which to focus the team’s efforts within the study. In new product manufacturing it may be of vital importance to identify the how the cost of each individual component contributes to the overall product, but how can one apply this oft times lengthy process to a large transportation project while preserving the teams time and momentum? Most of our standard transportation projects are comprised of very similar work that we are very familiar with, and the makeup of the work items, well understood. Presented here is the use of a modified “Function Value Resource Matrix” to achieve the benefits of doing the function value exercise, while fitting it into a shorter, meaningful timeframe for standard transportation projects. The modified function value resource matrix makes use of the project cost estimate and the major work type elements, i.e. structures, earthwork, surfacing. The work type elements are used in the matrix with the identified key functions, and the team gives a weight of importance to each element based on the importance to the principal project need. Each project element is then correlated to the identified functions: 1 = weak, 3 = moderate, 5 = strong. The correlation scores and importance scores are multiplied to provide an overall weight to the work element/function combination and the function cost is calculated. This modified method secures the

teams the ability to use the larger work elements that are comprised of many smaller components, and identify the associated cost contribution to important project functions. This method maximizing the time and resources used where, when utilizing the traditional method for a transportation projects, much of the function value exercise would provide little additional useful or beneficial knowledge about function cost.

2:30 PM

### **Best VE Recommendations Ever**

Presenters:

Paul Johnson, CVS-Life

Thomas W. Hume, CVS®

Jose Theiler, PE, CVS®

Steve Paget, CVS®, LEED BD+C

Mark Watson, PE, CVS-Life, PMP, PMI-RMP

Blane Long, CVS®

PDUs: 1.0 Hours

Core Competency: Value Program

"Greatest Hits" of VE recommendations are shared during this session

4:30 PM – 5:30 PM

### **VIRTUAL PRESIDENT'S RECEPTION**

It's 5 o'clock somewhere, so put on your island gear and grab a beverage (or two)!

Join using your computer, tablet or smartphone:

<https://global.gotomeeting.com/join/440259365>

You can also dial in using your phone.

United States: +1 (646) 749-3117<<tel:+16467493117,440259365>>

Access Code: 440-259-365

## **Tuesday, June 9, 2020**

7:30 AM – 8:00 AM

### **PLENARY**

Renee Hoekstra, CVS®

SAVE International President

8:00 AM – 10:00 AM

### **BLOCK 4**

8:00 AM

#### ***Giving a Client Value - Whatever That Is!***

Presenter: John Downer (Penspen LTD)

PDUs: 0.5 Hours

Core Competency: Value Methodology

All of us seek good value in everyday life and it is easy to understand why. In fact, we use expressions like 'value for money' to distinguish between options. What then is the 'value' in 'value for money' where it is easy to recognise the cost of something, but we lack any precise metric for value?

We all want products that are well manufactured, good quality, cheap and, of increasing prominence over the last decade, do not harm the environment. Further decision factors include safety, or social issues including the welfare of those involved in manufacturing the products. It is apparent that the number and type of criteria affecting preference and choice has increased in recent years. A product that exhibits all or

most of these factors may be deemed 'good value'. In the marketplace, good value products are rewarded by popularity and for the manufacturer this can translate into large sales volumes, increased profitability, and so on.

8:30 AM

### ***Uncommon Denominator***

Presenter: Jeff Rude, CVS® (Value Management Strategies)

PDU: 0.5 Hours

Core Competency: Value Methodology

A personally voiced editorial appeal that, while our value methodology is capable of awe-inspiring magic, we have severely limited our own visions and horizons of the possibility that our methodology inspires. We do this by maintaining a determined and steadfast adherence to the cost savings and resource focused paradigm, vernacular, and profession. While we state that the value methodology is about so much more than cost, we build our careers and our lives around the very common denominator that represents only half of the power and magic of value. By focusing on our passions and the function/worth numerator of our methodology; the upside leverage and life changing wonder and depth could eek its way back into our process, our careers, and our lives.

9:00 AM

### ***The Function Analysis Business Planning System as New Methodology for Business Startups***

Presenter: Noriko Murakami (Legend Consulting Company Limited)

PDU: 0.5 Hours

Core Competency: Function Analysis

Since the enforcement of the Industrial Competitiveness Enhancement Act, the business entry rate in Japan has continued to rise. On the other hand, there are plenty of cases where businesses start under perfunctory business plans and quickly go out of business.

The author has taught many entrepreneurs about the importance of business planning. In particular, analysis in the startup preparation period to the business introduction period is important for business continuity and growth.

In this paper, the author establishes and demonstrates the Function Analysis Business Planning (FABP) System, which incorporates function analysis as a methodology for substantial business plan creation. Furthermore, the management system for business growth is presented and its effectiveness is discussed.

9:30 AM

### ***The Case for Generic Fast Diagrams***

Presenter: James McCuish (Pinnacle Results LLC) and Bruce Lenzer, CVS-Life, FSAVE, CQM/OE, CLA, CAQMSA (Synergy Value Solutions, LLC)

PDU: 0.5 Hours

Core Competency: Function Analysis

This paper discusses a case for generic FAST diagrams and how and where they might be used in industry or government

The Function analyses system Technique (FAST) methodology approach to Function Analyses provides a clever conversational and graphic platform for the project team to create a highly visual, scalable and understandable "functional" plan. The FAST methodology utilizes a "how / why" logic to establish the requisite functional deliverables for products, equipment and organizations. The real world is messy and uses incomplete information.

Traditional Teams often develop FAST models from a "blank sheet" which contributes to clarity of understanding of all aspects of the analyses at hand and the focus for Creativity in the Value Engineering Job Plan. However, the authors have found there is a definite place for Generic FAST Models in both Equipment and Organization Optimization in Value Engineering workshops. Yes. There are hundreds of FAST maps in the archives. The FAST methodology is in the project tool kit. This paper presents examples



of the application of such generic FAST diagrams and discusses some of the pros and cons of the utility of generic FAST Diagrams and FAST Diagram Sections.

As has been proven for decades often significant cost and opportunity for improvement is “off the major logic path” of the FAST Diagram. Additionally, many subsystems which are not on the major logic path have generic supporting functions / function systems which have multiple technology and organization options to be considered.

Organizations are virtually identical to machines. The organizational activities are synonymous to machinery movement. Unfortunately, organizations are much harder to control, can be highly unpredictable when left to their own accord and are often driven by individual agendas and bias. As such, the FAST methodology provides an effective tool to examine the requisite functions (activities) required to deliver project objectives. The FAST focuses the project team such that objectives and deliverables are clearly understood and agreed. Similarly, there is a place for generic FAST Models in Organization FAST Mapping. Used judiciously generic FAST diagrams and FAST sections can be particularly useful for project teams and organization management and change management.

10:00 AM – 10:30 AM **BREAK / VIRTUAL CHAT ROOM**

10:30 AM – 12:30 PM **Professional Development: *Life Cycle Cost Analysis Techniques***

Presenters: Greg Brink, CVS®, PMP, PMI-RMP, PMI-PBA, CCEA, ENV SP (Value Management Strategies, Inc.) and Alex Mannion, CCT, VMA (Value Management Strategies, Inc.)

PDU: 2.0 hours

Core Competency: Cost Analysis

This 2-hour Continuing Education (CE) course will explore a streamlined method to perform life cycle cost analysis using advanced techniques, such as risk analysis and sensitivity analysis, to improve the decision-making process during Value studies. Additionally, graphic presentation methods that simplify cash flow analysis will be addressed so that participants can easily present a range of possible net present value (NPV) costs and schedules for future major maintenance events. Additional techniques will explore integration of risk-based cash flow analysis for estimating the total cost of ownership of alternatives to help stakeholders understand the implications project development and design decisions. Armed with improved information concerning life cycle cost, participants can balance initial and future cost to optimize their designs, improve the Value of their programs, and support their design decisions with defensible cost analysis leading to a higher probability of net Value Improvement and ultimate Value Alternative implementation.

12:30 PM – 1:00 PM **BREAK / VIRTUAL CHAT ROOM**

1:00 PM – 3:00 PM **BLOCK 5**

1:00 PM

***An Experiment Comparing COMBINEX and Choosing by Advantages to Evaluate Alternatives***

Presenter: John Koga, CVS-Life (Lean Construction Value Specialties LLC)

PDU: 0.5 Hours

Core Competency: Workshop Stage (Six-Phase VM Job Plan)

This experiment contrasts the way three different processes can help select a product. It sets the stage to ask which might be more valid and trustworthy when used in Value Engineering.

1:30 PM

***Adopting Value Management in the Organisation: Challenges for VM Champions***

Presenter: Timme Hendriksen (Value FM/ProRail)

PDU: 0.5 Hours

Core Competency: Value Program

We are fascinated by the fact that it takes a long time to successfully implement Value Management (VM) in an organisation. For example, it took ProRail, owner of Dutch Railways, about 20 years to get the VM program to the highest maturity level and it still has not reached its peak. The authors noticed that other VM implementation trajectories in organisations in various industries move in a similar time-consuming fashion. We also notice that a lot of organisations are not aware on where they are in their VM implementation and if they can even go to a higher level of maturity. The purpose of this paper is to structure this growth path from a VM Champions point of view to help them speed up VM implementation processes and make VM more successful.

In this paper we first want to raise awareness that we do not have guidelines how to get to the level described in VM standards. Then we will introduce three development stages, which we derived from ProRail's VM program evolution. Based on those three stages we present the experiences of various VM champions from different industries on what they have learned about when a stage has been accomplished successfully, what the main focus should be and which issues they encounter. We will conclude with some findings and recommendation on how to proceed with this topic.

2:00 PM

***New Three Techniques for New Store Opening and New Business Investment***

Presenter: Hisaya Yokota (Functional Approach Institute Co., Ltd.)

PDU: 0.5 Hours

Core Competency: Value Program

It is no exaggeration to say that value methodology (VM) has reigned as superb systems thinking. History has proven its effect. However, a new era has emerged, in which VM is being applied to the service industry. Its business models are ever-changing, which include those of stores. Hence, VM should be employed as an aggressive business tool, but not merely a cost-cutting measure. The author has undertaken several projects relating to new store openings, for which he devised and refined problem-solving techniques. This paper proposes a new method with such techniques, which is useful for new store openings and new business investments.

2:30 PM

***Development of a New Improvement Method of Combining Multiple Facilities for a Better Commercial Complex***

Presenter: Daisuke Kaida (Higuchi Group)

PDU: 0.5 Hours

Core Competency: Cost Analysis

The main characteristic of the commercial complex lies in its increased ability to attract customers by combining its multiple facilities. Through a study on a suburban commercial complex, this paper proposes a new improvement method to optimize the combination of its multiple facilities by allotting an appropriate cost to each according to its user type.

## Wednesday, June 10, 2020

7:30 AM – 8:00 AM

**PLENARY**

Renee Hoekstra, CVS®

SAVE International President

8:00 AM – 10:00 AM

**BLOCK 6**

8:00 AM

***Applications of VE in Alternative Delivery***

Presenter: Chuck Bartlett, PE, CVS® (Alfred Benesch & Company)

PDU: 0.5 Hours

Core Competency: Value Program

The advent of Alternative Delivery in the development of construction projects has provided choices for project owners. How to develop and manage the project can be improved through the use of value methodology principles. This paper provides an overview of how the methodology and tools of value engineering can benefit scoping, decision making, risk analysis and cost management for an alternative delivery project. These tools include the Value Engineering job plan, the use of functions in defining the project's objective, the use of functions in defining evaluation criteria, qualitative and quantitative risk analysis, and the traditional Value Engineering workshop.

8:30 AM

***How to Improve Your Presentation***

Presenters: Kyle Schafersman, PE, CVS®, PMP (Strategic Value Solutions, Inc.) and Don Stafford, PE, CVS® -LIFE, FSAVE, CTM

PDU: 0.5 Hours

Core Competency: Workshop Stage (Six-Phase VM Job Plan)

This paper provides guidance in improving performance in the Presentation Phase of the Value Methodology (VM) Job Plan and for presentations in general.

9:00 AM

***VM meets the Bermuda Quadrangle with Spiraling Dynamics, Value Methodology's Role in the Evolving World of Innovation***

Presenter: Robert Prager, PE, CVS® (Strategic Value Solutions, Inc.)

PDU: 0.5 Hours

Core Competency: Team Facilitation

This paper introduces how we are changing how we think and how VM adapts to match our new way of thinking. For Team facilitation - A. Manages Team Dynamics, B. Motivates Team, C. Expresses Communication Skills, E. Elicits Information, G. Keeps the Team Focused on Accomplishing the Objectives, and H. Leads Team to Consensus

9:30 AM

***Realigning Project Scope of Work Using Customized Value Strategy Steps***

Presenter: Ahmed Maged Ali, CVS®, PMP (Azzouni Consulting Office)

PDU: 05. Hours

Core Competency: Pre-Workshop Stage

The paper presents how value engineering can assist in realigning the project scope of work according to the client's actual needs and requirements.

A proper scope management ensures that the project's scope statement encompasses all the identified work or tasks required to be performed to successfully achieve the expected project's outputs.

However, only the work that is really required to be done should be incorporated in the project scope of work and this the point where we can utilize the knowledge of value methodology to examine the designed programs, components, systems or features thoroughly to verify its dependent importance in achieving project objectives.

The proposed methodology presented in this paper which is called "customized value strategy steps" acts as a complementary process that would be integrated with the standard value methodology job plan.

This developed approach assists in directing the value methodology towards defining the proper scope of work through applying the function analysis-oriented approach by asking two questions:

Firstly, ask about the present functions which digs into what has been done or designed in matters of selected programs.

Secondly, ask another question about what should be made to achieve the optimum value and exploring creative solutions to fulfil the project requirements through applying the most efficient way.

Then comparing the two answers together will properly help to identify what is actually must be maintained and what is really required for the project to produce in the end.

A case study “WADI AL-ADAIREH” urban and environmental development project has been presented in this paper with a real application of value methodology through a value engineering study of a construction project. The material shows how the adopted “customized value strategy steps” has demonstrated its effectiveness in manipulating with the scope challenges of such a complicated multi-task project.

10:00 AM – 10:30 AM **BREAK / VIRTUAL CHAT ROOM**

10:30 AM – 12:30 PM **BLOCK 7**

10:30 AM ***Value Concept for Government Programs***

Presenters: Corey White, PE, CVS® (U.S. Army Corps of Engineers), Megan Stachowiak, PMI-RMP, VMA (Strategic Value Solutions, Inc.)

PDU: 0.5 Hours

Core Competency: Value Program

This paper will discuss the results of a Value Study for the US Army Corps of Engineers (USACE) Value Program. The study was held as the result of multiple USACE staff asking the question “how can we get credit for doing things that add value?” through the normal course of business. The workshop had interesting revelations and laid out a path forward towards pushing for a change in the agency culture that considers the value formula as a guiding principle in the way we can do business in the future.

11:00 AM ***Building Success and Avoiding Surprises***

Presenter: Blane Long, CVS (HDR, Inc.)

PDU: 0.5 Hours

Core Competency: Transform Information

Blane Long, HDR’s Value Engineering & Project Risk Management Cross Sector Director will discuss how Risk Management can help your project.

Cost overruns and schedule delays are significant concerns when approaching your large-scale projects. Managing with an eye toward quality, safety and client reputation, you need to develop a framework that systematically tracks and proactively mitigates the risks that cause these challenges.

HDR’s approach combines a quantitative way to evaluate the likelihood and significance of risks with a collaborative framework for strategically managing those risks. This process makes transparency and consensus-building possible – identifying risk and mitigation efforts, achieving significant savings in investments, effectively allocating contingency funds, and attaining desired quality standards. HDR’s team has applied these services to more than 200 infrastructure investments, including highways, transit lines, railroads, ports, airports, tunnels, water and wastewater treatment facilities, hospitals and convention centers.

11:30 AM ***VM Study on the Personnel Evaluation System Presenter***

Presenter: Tomohisa Kakiyama (Higuchi Group)

PDU: 0.5 Hours

Core Competency: Function Analysis

It is generally recognized that the ‘personnel evaluation system’ itself causes an issue with personnel for many businesses in Japan. However, very few of them have definite plans for its improvement. For the most part, these businesses attribute their problem with such ‘evaluation’ to their ‘evaluation system’ and ‘evaluation tools’ themselves; and therefore they are more or less satisfied with merely changing such a system and its tools. This paper describes how effectively one can find a clue for its improvement when

conducting a VM study on the ‘personnel evaluation system’. Through analyzing an example of Higuchi Group’s own system, the paper also proposes VM applicability to improving the ‘personnel evaluation system’ in general and creating its related alternatives.

12:00 PM

***VM of "Five Senses Appeal" through its Value Measuring Method***

Presenter: Kazuhiro Fukae (Higuchi Group)

PDU: 05. Hours

Core Competency: Function Analysis

As a means to improve their product value, some restaurants use an ‘open kitchen’. This kitchen type, through which customers can openly see chefs cooking their ordered food, is aimed at increasing their expectations and persuasion by showing them the cooking procedure of the ordered food. However, many of such restaurants have difficulty in finding an effective and optimal method of designing or improving their open kitchens and developing their related foods. Such kitchen improvements often rely merely on instinct, which causes low staff productivity and sluggish customer value creation in the restaurant industry as a whole. This paper describes a VM analysis on the function of “Five Senses Appeal” of customers at ‘open-kitchen’ restaurants, by the use of its value measuring method. Through this study, the paper also describes how effective the value of “Five Senses Appeal”, quantified by such a method, is for these restaurants to improve their products.

12:30 PM – 1:00 PM

**BREAK / VIRTUAL CHAT ROOM**

1:00 PM – 3:00 PM

**Professional Development Session: Transforming Information for Enhancing Value Studies**

Presenter: Thomas Cook, CVS®

PDU: 2.0 hours

Core Competency: Transform Information

Session Objective will be to interactively demonstrate real world techniques for defining, collecting, organizing, and transforming data to aid Value Teams’ understanding of the value index (function cost divided by function worth).

This transformation occurs initially in the pre-study information and data gathering period. Relevant data on cost, process, risk, quality, user expectations, goals etc need to be collected, demystified, and packaged in a concise, digestible format for effective use during the Value Study.

This training session will demonstrate how to further transform this information, with an eye on function, by the Value Study Team to enhance their insights during the Information/Function Analysis Phase. This conference session will show best practice in identification, collection, modeling, packaging, all with the goal of transforming information and data to aid a Value Study Team in discovering new perspectives and opportunities.

**Thursday, June 11, 2020**

8:00 AM – 12:00 PM

**POST-SUMMIT WORKSHOP**

***Introduction to VE in Combination with Mediation: Supertool for Multiparty Plan Making***

Instructor: Dorine Cleton, LLM (CLETON&COM)

PDU: 4.0 hours

Core Competency: Pre-Workshop Stage

After presenting and winning the paper of the Year award in Austin, Texas (2018) for “VE in combination with Mediation as Super tool for Multiparty Plan Making” many people inquired: How does it work exactly? How do I get the information, joined criteria? How do you get from random suggestions about the area to VE, FAST and a coherent process that ends with doable alternatives? In Portland (2019) I

conducted a half day workshop to explain how the method works and letting the attendees experience several steps themselves. The workshop received positive feedback, but there was one comment: please make it into a full day workshop. This proposal is for that full day workshop. It will allow more interaction and more changes for the attendees to really experience what the method is all about.

It will provide an introduction to mediation, will give an inside in the facilitation skills needed and simple methods that have proven to work and will give an overall view about the process of combining mediation (PPNP) and Value Engineering. The workshop will look into the difference in this process in the information phase (getting information from citizens, the city and the developer), criteria, FAST, team), the joined effort (specialist, citizens and stakeholders), as well as the presentation to all parties, citizen, city and development company. It will also provide information about how the city, board as well as city council, civil servants, specialist can and have to be involved. Lessons learned will be shared. Special attention is given to the Pre-workshop Stage.

This workshop will use Teams as their virtual platform. Dorine and Thera de Kramer will be also incorporate Mural for interactive participation.

## Thursday, June 11 – Sunday, June 14, 2020

7:30 AM – 5:00 PM  
EACH DAY

### ***Value Methodology Fundamentals 1 (VMF1)***

Instructors: Javier Masini, CVS® (Advanced Value Group, LLC) and Patrice Miller, CVS® (RHA, LLC)

PDU: 8.0 hours / 32 hours total

This course is designed for individuals involved in manufacturing, construction or any design-oriented professionals. You will learn an extremely valuable process to help you make improvements, seek out innovation and value opportunities for products, projects, programs and processes, and even the way you and your organization does business. This course is the first step toward the certification process. Once you complete this course and pass the VMA exam, you will obtain your first level of certification.