

MATRIZ Regulations for Multilevel Certification of TRIZ Practitioners and Specialists

1. Introduction

- 1.1. The present regulations have been developed in compliance with MATRIZ By-Laws, recommendations of TRIZ founder G.S. Altshuller and decisions of MATRIZ Congresses.
- 1.2. The regulations are approved by MATRIZ Presidium and put into force after they are signed by MATRIZ President.
- 1.3. Alterations and amendments to the present regulations from individual MATRIZ members and organizations, which are MATRIZ members, should be submitted to the Council on Expertise and Methodology (CEM). MATRIZ Presidium includes alterations and amendments to the present regulations based on recommendation from the CEM. Alterations and amendments to the present regulations are put into force after they are approved by MATRIZ President.
- 1.4. The level of competence and professional qualification of TRIZ specialists should be in compliance with MATRIZ requirements as set forth in the present regulations. The text of the present regulations and procedure of certification can be found on MATRIZ official web site.

2. General provisions

- 2.1. The system for training users and specialists on the Theory of inventive problem solving includes five levels approved by the International TRIZ Association (MATRIZ). The subdivision into levels is intended to stimulate professional growth of persons working in the field of TRIZ application as well as to create best conditions for accurate positioning of specialists in the eyes of potential clients ordering services involving TRIZ application.
- 2.2. The levels are divided into two categories – users (levels 1-3, attestation) and specialists (levels 4-5, certification).
- 2.3. The first three levels reflect the degree of TRIZ knowledge. Levels four and five reflect, primarily, the effectiveness of the candidate's activities in the field of TRIZ.
- 2.4. Persons, who have taken a TRIZ course in the volume specified for level 1, possess knowledge of basic TRIZ notions and obtain understanding of TRIZ place in the system of innovations, in compliance with TRIZ certification standards.

Besides, persons, who have taken a TRIZ course in the volume specified for level 2, obtain skills of using main TRIZ tools in compliance with TRIZ certification standards.

Persons, who have taken a TRIZ course in the volume specified for level 3 and correspond with level 2 requirements, become able to use obtained knowledge for solving practical problems in their main sphere of activity in compliance with TRIZ certification standards.

Persons, who are qualified as level 4 specialists, have defended a level 4 thesis and are able to use TRIZ in the areas, which are not related to their main sphere of activity (including fulfillment of orders from an individual or corporate client) involving TRIZ application; they are acquainted with developments in the field of TRIZ, which are beyond the boundaries of TRIZ knowledge required for level 3 specialists and can apply this knowledge in practice; they are capable of teach TRIZ in the volume specified by MATRIZ.

Persons, who are qualified as level 5 specialists, have defended a level 5 thesis and are able to independently state problems and solve them using TRIZ; they are engaged in theoretical and practical developments in the area of TRIZ, development of TRIZ as a scientific theory, including development of methodological foundations of TRIZ, tools for the analysis of problems and synthesis of inventive problem solutions, etc.; they broaden practical TRIZ application.

Appendix No. 1: "TRIZ knowledge standard"

(The content of levels 4 and 5 is described in greater detail in Appendix No. 2 "Provisions for TRIZ certification for Level 4" and in Appendix No. 3 "Provisions for TRIZ certification for the Highest Level (TRIZ Master)".

- 2.5. The certification process is organized and carried out by the CEM and by the authorized representatives, who report to this Council; the results of this work are approved by MATRIZ President.
- 2.6. Members of the CEM are selected from among the persons, who are certified on levels 4 and 5, by MATRIZ Presidium and are approved by MATRIZ President.
(Appendix No. 4: Provisions on CEM).
- 2.7. Regional Associations – MATRIZ members, members of MATRIZ Presidium, CEM members and CEM representatives are forbidden from the utilization of MATRIZ resources for dissemination of any other forms of certification TRIZ specialists, which is not part of MATRIZ certification system, without explicit permission from MATRIZ Presidium.

MATRIZ resources include: finances, intellectual property, MATRIZ rules and regulations, MATRIZ website, MATRIZ logo, and any other MATRIZ copyrighted elements such as forms of certificates.

- 2.8. In case of a violation of the rules in 2.7:
 - a regional organization is expelled from MATRIZ without recourse;
 - a member of MATRIZ Presidium and/or a member of MATRIZ CEM is expelled from the membership;
 - CEM representative's license is revoked.

3. Attestation for Levels 1, 2 and 3

- 3.1. Attestation for Levels 1-3 is preceded by a class room instructions or instructions by correspondence and is based on results of term and course papers, completed during the training process and defended according to the specified procedure. If the candidates for

the 2 or 3 level certificates do not have the previous level, then the attestation must include checking for knowledge and skills relevant to all the previous levels.

- 3.2. Authorized representatives of MATRIZ CEM responsible for the attestation (hereinafter referred to as “authorized representatives”) deal with local issues related to the Levels 1-3 certification. Their decision is approved by MATRIZ CEM.

(Appendix No. 5: Provisions for authorized representatives of MATRIZ CEM, responsible for Levels 1-3 attestation)

(Appendix No. 6: Form of application for a candidate to become an authorized representative of MATRIZ CEM responsible for Levels 1-3 attestation)

- 3.3. A person to be certified must select an authorized representative, to whom an application for attestation and a set of required documents will be submitted. The said selection should be based on information on Authorized Representatives placed in the official MATRIZ web site. If a person to be certified so desires, the CEM may make a decision to replace an Authorized Representative, who conducts the attestation.

(Appendix No. 7 “Form of the list of authorized representatives in the MA TRIZ web site”).

- 3.4. A person willing to pass the attestation must submit an application and required set of documents to the selected Authorized representative. Based on the received documents, the Authorized representative determines the applicant’s level of readiness for certification on the requested level. If the applicant is ready, the Authorized Representative sets up the schedule for an exam provides information on payment terms for his/her service.

(Appendix No. 8 “Set of documents submitted by a candidate for MA TRIZ certificate”).

4. Certification for Levels 4 and 5

- 4.1. The process of certification is regulated by “Provisions for TRIZ certification for Level 4” and “Provisions for TRIZ certification for the highest level (TRIZ Master)”.
- 4.2. Only a person having a Level 3 TRIZ certificate has the right to request Level 4 certification. Only a person having a Level 4 TRIZ certificate has the right to request Level 5 certification.
- 4.3. Certification for Levels 4 and 5 should be based on the results demonstrated by an applicant when accomplishing independent tasks, taking part in conferences and competitions, preparation of publications, manuals and inventions, rendering consulting and other services. Publications could be devoted both to descriptions of solved problems and to theoretical and methodological issues. Materials published in TRIZ Journal, in MATRIZ certification bulletin, in magazines and other published sources marked “Recommended by MATRIZ”, as well as on the MATRIZ web site, could also be considered as publications (in addition to generally accepted list of editions). Decision regarding certification is made based on the quality of dissertation thesis. The total set of works of an applicant in the field of TRIZ could be regarded as a dissertation thesis. The dissertation thesis is reviewed and recommended for the defense by the CEM.

- 4.4. A decision on issuing a Level 4 MATRIZ certificate is made by the CEM and enters into force after it is approved by MATRIZ President. Every six months the Chairperson of the CEM should submit to MATRIZ Presidium the information on new Level 4 specialists. This information is also published in the Bulletin on attestation and certification.
- 4.5. For the level 5 certification, the Chairperson of the CEM submits a list of Dissertation Council Members to be approved by MATRIZ Presidium, no less than 7 and no more than 12 persons. The decision on qualifying an applicant as level 5 specialist is taken by MATRIZ Dissertation Council. The order of its work is specified in "Provisions for TRIZ certification for the highest level (TRIZ Master)".
- 4.6. A decision on qualifying an applicant as Level 4-5 specialist based on a summary of experience is proposed by the CEM or by the Dissertation Council, is made by MATRIZ Presidium and enters into force after it is approved by MATRIZ President.

5. Availability of information on certification levels and payment for certification procedure

- 5.1. Information on issued certificates is entered into a single database of MATRIZ on certified persons. For the list of data to be entered into the certificate, as well as for requirements to their graphic design, see Appendix No.9 "Certificate forms".
- 5.2. The information on issued certificates is published in the MATRIZ web site, MATRIZ Newsletter and Bulletin on Certification.
- 5.3. The cost of review of submitted materials and issuance of certificates by MATRIZ is determined by MATRIZ Presidium. MATRIZ Presidium can make a change in the financial requirements, based on individual case.
(Appendix No.10. Price list for the certification procedure).

6. Technology for controlling the knowledge and skills

- 6.1. Authorized representatives use the approved system for controlling the knowledge of persons to be certified (test tasks, answers to questions, problem solving, term and course papers, and so forth) in compliance with TRIZ standard. The knowledge control procedure developed by Authorized representative, which is different from the one approved for use by MATRIZ, is defended by him/her before the CEM. It should comply with the requirements set forth in the present Regulations. Based on the results of such defense, an alternative system for knowledge control could be approved by the CEM of MATRIZ as acceptable for this specific Authorized representative.

(Appendix No.11 "Requirements for term and course papers";

Appendix No.12 "Recommended literature on TRIZ")

7. Appendices

Appendix-1_Knowledge-Standard

Detailed Descriptions of the topics required for L1-3 as depicted in Appendix 1

Appendix-2-Level-4-Regulations

Appendix-3-TRIZ-Master_Certification-Regulations

Appendix-4_CEM-Regulations

Appendix-5_CEM-Representatives-Regulations

Appendix-6_Application-of-CEM-representative

Appendix 7_Form for List of CEM Representatives

Appendix 8_Set of documents for level 1-3

Appendix 9 Certificates Forms

Appendix 10 Certification Price List

Appendix 11_Requirements to theses

Appendix 12_Recommended TRIZ literature

Appendix 13_TRIZ trainer diploma

Appendix 14_Structure of Level 5 thesis

Appendix 15_TRIZ Master Diploma

Appendix-16 Accreditation License-fee