

Certified Marina Operator CMO Applicant's Handbook



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WHY SHOULD YOU BECOME A CMO

- Are you looking for the best marina management job in the best market for the best salary?
- Are you looking for business contacts in your own as well as other boating regions?
- Are you looking for professional marina colleagues with whom you can openly share experiences and ideas?

Higher Earnings

Similar to the leading professional qualification and certification programs in other industries (such as the real estate industry's CPM® Certified Property Manager® program), employers seeking the best qualified managers for marina properties are demanding that applicants be Certified Marina Operators to satisfy their investors, bankers, insurers, and customers that their marina properties are run as professionally as possible.

With all things being equal—age, education, experience—professional certification can indeed make a difference in salary. Those holding a professional designation are projected to earn an average of 10 to 15 percent more than their colleagues without such credentials, based on experience in other service industries.

Preferred Employment Opportunities

More and more marina business investors each year are seeking highly qualified professional managers with top credentials to manage their investments. The CMO and CMM are the only credentials of professionalism in the marina industry.

Why will the CMO be sought? Because employers, fee management clients, investors, and lenders perceive the CMO as having qualifications other managers lack. They feel the CMO designation indicates a manager who is more aggressive, qualified, professional, and committed to marina management as a career as well as someone who is more up-to-date in the latest procedures, techniques, industry regulations, and requirements.



Instant Recognition

Once you become a CMO, you'll feel confident that the people you want to impress—employers, peers, bankers, investors, etc.—will know it means you've distinguished yourself as an outstanding professional. Professional certification is, after all, a highly prized mark of distinguished achievement among practicing professionals.

AMI Networking Opportunities

The Association of Marina Industries (AMI) is the only industry association dedicated to educating and certifying all marina management professionals.

As a CMO you'll become a member of a global organization characterized by the open sharing of experiences, ideas, and information. AMI is a community of professionals with unmatched networking opportunities. Through AMI you can connect with prospective mentors, clients, partners, and potential employers.

AMI is your "Marina Industry Think Tank." Use the simple self-evaluation checklist on the next page to find out if you are ready to become a candidate for CMO.

HOW YOU CAN BECOME A CMO

Yes! I'm ready to become a CMO Candidate because:

- I have 3 years' marina management experience according to AMI's definition. This means that during these years I have done all of the following:
- I have managed a marina operation with annual gross operating revenue (from the marina as well as all other related operations) of at least \$500,000, OR has managed a marina business with at least 50 boats in wet slips, moorings and/or dry rack storage slots.
- I have spent at least 60% of my time in that position on: 1) Financial Planning, 2) Marketing & Customer Relations, and 3) Staff Administration.
- I have had full-time employment, in which I've supervised at least six employees.
- I can satisfy the Review Committee that my marina management experience passes the 14-point test (CANDIDATE EXPERIENCE pages 6, and 7 on CMO application). I have performed a minimum of 14 of the required management function, out of 26 listed during each qualifying period of marina management experience.
- I currently am in the marina management business. This means that I am now performing the functions required above, and meeting the percentage of time spent requirement above; or if I am not managing a marina at this time, I have done so (meeting all of the preceding requirements) for at least six out of the past 12 months.
- I have a high school diploma or its equivalent.
- I am a member of the Association of Marina Industries, either as the employee/owner of a Full Member of the association, or as an individual Associate Member.
- I am an active member of the marine trade association that covers my state, province, or region. If there is none, I can demonstrate active participation in another regional business league or similar organization.
- I have already met, or can reasonably expect to meet, all the requirements to qualify as a CMO in the next 24 months, including completion of the prerequisite AMI training courses, and the three years of qualifying marina management experience requirements.

**If you checked all of the above items, what's stopping you?
Complete the Application for Candidacy for CMO today!**

If you do not qualify for immediate designation as a CMO, once you become accepted as a candidate, you will have up to two years to fulfill all the requirements to become a CMO. Of course if you have already completed some of them, you're that much further ahead!

You'll become a CMO when you:

- Have accumulated 3 years of marina management experience, with two of these years being the immediate past three years. Again, this means passing the aforementioned tests of marina size, and/or gross revenues, employees, percentage of time, and qualifying functions of your job, during these 3 or more years.
- Have completed the CMO qualifying training courses (IMM and MOC)
- Have completed a personal interview with a CMM representing the CMO Review Committee. (This requirement may be waived in some cases.)
- Have remained a member in good standing of AMI (as defined on preceding page). Continued membership in AMI is required to retain good standing as a CMO.

Note: The criteria for certification is subject to revision by the CMO Advisory Committee. Prior to submitting your Application, be sure that you have the current edition of the Handbook and Application forms.

The preceding checklists gave you a quick overview of what you must do to become a CMO. On the following pages, you'll find a more detailed explanation of the requirements.

A DETAILED EXPLANATION OF THE CMO REQUIREMENTS

Experience

The CMO designation is firmly rooted in professional experience—which has a very specific definition within AMI. To be designated a CMO you must have three years' effective marina management experience. Obviously, it's important for you to understand what AMI means by "effective marina management experience."

To receive credit for your experience, you must pass three tests for each of the periods in question: the 14-point test, the minimum capacity test, and the percentage of time test.

14-Point Test

AMI has broken down the activities performed by marina operational managers and marina asset managers into 26 functions. These functions are listed on the Experience Credit Form section of the application (pages 5-8).

The first 14 functions typically are associated with general marina management functions, while functions 15 through 26 typically are associated with marina asset management. Regardless of their titles, most managers usually perform functions from both categories, and you probably do too.

You pass the 14-point test if you performed, to the CMO Review Committee's satisfaction, the 14 of 26 marina management functions required during each qualifying period. If, in any one period, you fail to perform these functions, you receive no credit for that experience, because you would not be functioning as a marina manager per AMI definition.

When you complete the Application, review each management function carefully, making sure that you are (or were) fully responsible for it before you check it. To help you understand the intent of the functions and to guide you in preparing your Application accurately, four of the functions are explained further on the next page.

Remember: Before you check a function you should be sure you have full and final authority for that function. Reviewing the following examples should help you better determine what is intended.

Function 2: *Decide which items or services are to be purchased, determine quantity and quality of purchases, approve invoices, and negotiate or approve contracts for goods and services*
The focus of this function is on the purchase of materials and services needed to operate a marina properly, such as legal and auditing services, security services, garbage collections, and new contract negotiations. Do you make these decisions? Do you authorize the purchase orders and approve invoices?

Function 16: *Manage with full delegated authority.* Functioning as a marina asset manager, you would check this function if you represent the asset owner(s) in working with subordinate managers of the marina's profit centers. For an area manager, this could include supervising several on-site managers.

Function 20: *Identify and analyze uses of property, and implement a plan to change a property's use, or approve such a plan.* This question focuses on major changes of use or ownership. Examples of such changes might include converting a marina to dockminium ownership or converting the primary upland activity to a boatyard or ship repair. The analytical process would include a thorough market analysis, projected income and expense budget, and the impact of the change on the property's income and value. Have you been involved in a significant conversion of this kind?

Function 25: *Authorize the establishment of, or approve, controls and management information systems (e.g., accounting systems).* A marina asset manager would be responsible for the controls established by the firm as well as its management information systems. This would include the systems themselves as well as the reporting format.

Keep in mind that you will be questioned on the functions during the AMI personal interview. Note also that you must share examples of how you perform(ed) the functions in the Employment Narrative Report that you will write (See Application page 8). The verification process prior to acceptance to CMO Candidacy will also spot-check the performance of these functions.

Minimum Marina Capacity Test

In addition to performing at least the 14 required functions during the qualifying experience, you also must be managing a marina of at least a certain minimum size and thus pass the minimum capacity test. You must be managing, or have managed, the marina capacity or size indicated below:

- A marina operation with annual gross operating revenue (from the marina as well as all other related operations) in the amount of at least \$500,000, or if less than \$500,000, an amount approximating the “average” annual operational revenues of what would reasonably be considered as comparably sized marina facilities in your geographic region. See Page 9 of 9 of the Application form, which must be completed by the applicant if the revenues are less than \$500,000

AND/OR

- A recreational boating facility with at least 50 boats in wet slips, moorings, and/or dry rack storage slots.

Documentation To Be Submitted with Application

Please read each question in the Application carefully and answer each question fully. Note the requirements for documentation to be submitted along with the Application. Items that require such documentation are: Numbers 16, 17, 18, 19, 20, 21. Also the Candidate Experience section requires the documentation listed on page 8 of the Application.

The Application is designed so that you complete, gather, and submit all of the information and supporting documents in one package. This gives you, the applicant, more control over the timing and completion of your Application, and lets you make sure that no supporting documents are misfiled or lost in the mail.

STEP BY STEP THROUGH THE APPLICATION FOR CMO CANDIDACY

A few general comments about completing your Application:

- Use a computer, or print neatly and clearly in black pen.
- Answer all of the questions completely and accurately, referring to this Handbook as you do so.
- Use the Application checklist to make sure your Application is complete.
Your Application cannot be fully processed and you cannot be approved as a Candidate until it is complete.
- After you've completed the application, make a photocopy for your own files, of the Application forms and any supporting documents that you send along with the Application.
- Four (4) copies of the entire Application and all supporting documentation must be submitted to AMI in order for the application to be considered.

Application Pages 1 through 4

Questions 1 through 15: Biographical Information. Complete all of these questions, being sure to indicate on Question 8 where you want your Candidate mail to be sent.

Question 16: Employment History. In 16.1, begin with your current employment, and go back at least 10 years. The periods of employment in this section must coincide with the periods shown on pages 5, 6, and 7.

Question 17: Marine Association. Please also list the telephone number of the association secretary's office ON A SEPARATE SHEET.

Questions 18: Education. Please make sure your application is complete throughout all six parts of the question.

Questions 19, 20, and 21: Other Information. If you answer "yes" to any of these questions, you must provide a written explanation with your Application on a separate sheet.

Question 22: References. To support your Application, you must provide six letters of recommendation:

- (1) One from your present superior or employer if a professional marina manager (or if a marina owner: one from another marina owner). If employed fewer than two years at your present marina, a letter from your previous employer is also required, for a total of seven letters.
- (2) Two CMM or CMO as references. If only one CMM/CMO reference can be given, then a second (past) marina employer reference is required. (Get approval from AMI for only one letter from CMM/CMO.)
- (3) One officer of a local or regional marine trade association. If there is no trade association in your region then obtain letter from regional business league, in which you are an active member.
- (4) Two other business professionals: former employers, business associates from other companies, or others from outside your organization who are familiar with your character and capabilities over several years.

Favorable written letters of recommendation by qualified references are required. Only one reference letter should come from your present marina operating organization.

To each person who you ask to serve as a reference, you should give:

- A confidential letter of recommendation form (after you've typed your name and address on the top of each form).
- A recommendation forwarding envelope (after you've typed your own name in the lower left corner). And that the letter of recommendation be sealed in this envelope and forwarded, within seven (7) days of receipt, to the International Marina Institute; 50 Water St.; Warren, RI 02885.

Question 23: Rules and Regulations. Although there is nothing to complete here, be sure to read all of these rules and regulations.

Question 24: Signature. By signing here, you attest to the accuracy of all of the information reported on the application and indicate that you have read and fully understand the policies governing the CMO program, as covered on the application itself and in the Applicant's Handbook.

Note: If there isn't enough space to fully answer any question(s), please add a page with the question's number and information.

Application Page 5 - Experience Credit Form (Part One: Portfolio Information)

Page 5 of the Application is the first part of your Experience Credit Form, where you report your marina management experience. The information you provide will determine whether your experience earns credit toward the CMO designation.

Start with the first column labeled "Period 1" by indicating start and end dates, beginning a new column whenever you had a change in employment, position, or responsibility, or whenever your marina changed. Thus, one column may represent more than a calendar year or less than a calendar year. The first column used should represent your current position.

Item 1, a through d: Marina Information. For each reporting period, you first are asked to indicate, by boat storage capacity, the marina you manage or managed. This information is extremely critical in determining if you pass the minimum portfolio test and can receive credit for your experience.

Item 2, a through o: Gross Annual Income. Give approximate gross annual revenues of the listed activities in the marina you managed. If any of these activities were not managed or supervised by you or one of your subordinates, please circle the dollar amount and make note of this fact in the space below "TOTAL of 2.a through 2.o.:"

Item 3, a through f: Proportion of Time. Next, for each period, indicate what percentage of your typical work week was devoted to marina management and asset management as opposed to other activities. This is needed to determine if you pass the percentage-of-time test.

Item 4: Manager Supervision. For each period in question, specify how many months you worked as a Manager, or reporting directly to a General Manager.

Item 5: Employees Supervised. The number of employees you record here should be only those employees who are directly in the chain of command below you, and below your subordinates who report directly to you. Remember to submit the required marina organization chart. (See next page...8 of Application.)

Application Pages 6 and 7 - Experience Credit Form (Part Two: Management Experience)

Here you will indicate what activities you performed at the marinas reported on page 5. Be sure to align the periods listed on page 5 with the column headings on page 6.

For example, assume that for Period 4 on page 5 you inserted the dates from 1/1/87 to 7/7/88, and below that you listed the marina you managed. On page 6 under column 4, you should check the functions you performed from 1/1/87 to 7/7/88 at this same marina.

Remember: You must be able to check the required 14 of the 26 functions to receive any experience credit for the corresponding period. The CMM/CMO Review Committee looks for satisfactory minimum experience in this section.

Application Page 8 - Required Supporting Documentation

You are required to submit the following supporting documentation along with the Candidate Experience section of the Application:

Marina organization chart showing the organizational structure of the marina (or marinas) managed. Include job titles and the names of those people reporting to you, and to whom you report. Include a copy of the most recent employment report submitted to your state or province department of employment.

Photographs (in electronic format) of all berths (aerials if possible), wet and dry, and general photos of all major profit centers (fuel dock, chandlery, restaurant, service or repair facilities, etc.). Please include close-up photographs of typical dock facilities and restrooms for dock customers.

Marina promotional material: Brochures, dockage price lists, typical advertising for the marina.

Latest Annual Marina Operating Statement: 12-month profit/loss statement, with profit and cost centers itemized. This will be kept strictly confidential, with no distribution outside the AMI's office.

Application Page 9 - Regional Facilities

Comparably Sized Facility Information

Page 9 of 9 of the Application need not be completed if the applicant's current marina has gross marina-related revenues of \$500,000 or more. The 12-month profit-and-loss financial statement required to be submitted with the Application will be used to verify the level of gross revenues.

Applicants whose facilities do not meet this \$500,000 minimum requirement must complete page 9 of 9.

Employment Narrative Report

Here you will be supplementing your Experience Credit Form by providing a Narrative Report of your experience. Page 8 on the Application describes the narrative report AMI expects from Applicants. Additional reports are required for each period of time listed on page 5.

Use your own words to describe your duties and responsibilities. Do not provide a resume or job description, and do not merely restate the functions you checked on the Experience Credit Form. Give specific examples of how the management functions were performed, and using the function descriptions as an outline, describe in your own words your ongoing management role as well as experiences in the company. The report must clearly state who you reported to, and who reported to you. You may refer to the supporting documents submitted with the Application.

You do not have to prepare a report for each year, but you should complete a new report each time you had a change in your title or employer, each time your marina capacity changed significantly, or whenever your job responsibilities changed whether or not you had a job change or title change.

If any or all of your experience was with a government or public agency—or if you had any other position that might not be readily recognized within the marina industry— your Narrative Report becomes especially important. You should be quite detailed, and should explain how you perform(ed) each of the functions that you checked on the Experience Credit Form. Remember, your skills in written communication will be judged, in part, by this report.

CMO Application Processing Fee

Each Application must be accompanied by a check or money order drawn on a US bank, made payable in US dollars, to the “Association of Marina Industries”. The current application fee is US \$275.00.

Verification of Information

When AMI receives your Application, IMI staff will review it carefully to determine that everything has been properly completed. You will receive an acknowledgment of receipt within two weeks. If there are any questions about your Application, they will be asked in a follow-up letter. You should expect this letter within 30 to 60 days.

Once your Application is complete, copies of it will be sent to the CMM /CMO Review Committee, a representative of which will contact you to schedule a follow-up interview, if required. Your name will also be circulated to CMMs and CMOs, giving them an opportunity to comment on your Application.

The processing of your Application and the Committee approval of candidacy may take 90 to 120 days, although every attempt will be made to shorten this time. Consequently, it will be at least 60 days—and usually longer—before your application is approved. You will receive this approval notice in writing. Your candidacy period will begin the first day of the month after which your application is complete and Committee approval is received (e.g., if your application is complete and Committee approval is received on May 12, your candidacy period would become effective June 1).

You may be a candidate for no more than two years prior to your qualification in all respects for CMO certification. Your candidacy period will be calculated from the date you are approved for candidacy, not from the date you submit your application.

Application Checklist

Your CMO Application is complete if it includes:

- Completed four page application form (pages 1 thru 4).
- Completed Experience Credit Form (pages 5 thru 7).
- Completed Employment Narrative Report(s), and additional supporting documentation (page 8).
- Completed Regional Facilities form (page 9) if gross revenues require submission.
- The required six completed letters of recommendation.
- Evidence of high school graduation or its equivalent.
- Other supporting documentation as appropriate.
- A check or money order made payable to the "Association of Marina Industries" for the nonrefundable application processing fee: US\$275.00. Payable by VISA, MasterCard, or a check in US Funds, drawn on a US Bank.
- Five (5) copies of the entire application and all supporting documentation must be submitted to IMI in order for the application to be considered.

Your CMO completed application should be sent to:
International Marina Institute (a division of AMI)
50 Water St. Warren, RI 02885 USA

CMO Executive and Review Committees' Roles

1. Establish, define, and revise AMI standards of marina manager professional excellence.
2. Establish application procedures and process for application review.
3. Vote on all CMO applicants.
 - a) Review and approval of each application.
 - b) Verify and field interview each applicant (rotating by region), as needed.
 - c) Create and revise written test; adopt passing score.
4. Develop and conduct appeals process; has the right to make exceptions in rare special cases with unanimous consent of the Committees.
5. Supervise the CMO Code of Ethics.
6. Establish and enforce re-certification requirements for maintaining the CMO designation and the credits for continuing education system for re-certification.
7. Develop guidelines for revoking or decertifying a CMO or Committee membership for good cause.
8. Committee members are elected for one-year terms by CMOs at annual CMO meeting.

AMI Role

1. AMI does not control the CMO program; its role is to facilitate and administrate only.