

EQUIVALENCY-BASED CFM CREDENTIAL*

Since you reside in a part of the world where we have not yet customized the exam for use, you can apply for equivalency-based certification. This process requires that you complete a very detailed application that describes your work experience. It takes the average person about 40 hours to complete this information. A panel of CFMs will review the application to determine if you meet the requirements for the CFM credential. **Please note this process could take months. The panel is a small group which reviews many applications. All candidates are strongly encouraged to consider taking the CFM Exam at a local Prometric Site.**

Please note: We will no longer accept Equivalency Applications after June 30, 2010. If you decide to apply for the CFM by completing the Equivalency Application it must be received in our office no later than June 30, 2010.

In order to apply, your education and experience **must** fall into one of the following categories:

Education	FM Experience
FM master's or bachelor's degree from an IFMA recognized program	5 years
Related bachelor's degree	6 years
Non-related bachelor's or associate's degree	9 years
Some post-secondary education	12 years
In addition, all categories require some type of continuing education within the past five years.	

You will be evaluated in each of the competencies that are addressed on the exam. You can review these at IFMA's web site. Go to www.ifma.org, click on "Certification" and, from the drop down list, select "CFM Preparedness." On the equivalency application you will describe your accomplishments in each competency area.

Please carefully review the prerequisites listed above and make sure that you meet these requirements. Then, please sign the following statement:

I have reviewed the requirements listed above and I am eligible to apply for the Equivalency-based CFM.

Signed: _____

Date: _____

Here is your application for CFM Equivalency-based certification. ***Please read this page carefully!***

- **Please return the application in electronic form if at all possible and include credit card information for payment. List the type of card, number, expiration date and name of the card owner at the end of the application.**
- **Incomplete applications will be rejected and returned, and the fee will be forfeited. A complete application will contain the following items:**
 - **Completed application in sufficient detail to document the applicant's experience level**
 - **Three letters of recommendation with signatures and telephone numbers of the signers**
 - **A fee of US\$525 for IFMA members and US\$775 for non-members**
 - **Please note that the last day to submit an Equivalency Application is June 30, 2010.**

Once your completed application is returned to IFMA, it will be forwarded to an international panel of CFMs. Independently they will read your application and let IFMA know if you should or should not be granted the CFM designation. This process can take several months. Once we have responses from the entire panel you will be notified of the result. People who are approved receive a CFM certificate and lapel pin. People who are not approved are sent a letter explaining why they have been turned down and what, if any, their options are for earning the credential.

We look forward to receiving your application. If you have any questions, please e-mail certification@ifma.org.

INTERNATIONAL FACILITY MANAGEMENT ASSOCIATION
1 East Greenway Plaza, Suite 1100, Houston, Texas 77046-0194
APPLICATION FOR EQUIVALENCY-BASED CERTIFICATION

Please complete all information on this application and return it to IFMA according to the directions at the end of this application. It must be returned with credit card payment of \$525/members or \$775/nonmembers.

Mr.[] Ms.[] Mrs.[]

Name: _____
as you want it to appear on your certificate

Work Address

Title:

Organization:

Address: (No P.O. boxes)

City:

State/Province:

Zip/Postal Code:

Country:

Phone:

Fax:

E-mail:

Home Address:

Street:

City:

State/Province:

Zip/Postal Code:

Country:

Phone:

Fax:

E-mail:

EMPLOYMENT HISTORY

CURRENT OR MOST RECENT POSITION

Organization name and address	Dates of employment	Title	Immediate supervisor, name, title and phone number

Provide a brief description of your job responsibilities in the space below:

NEXT MOST RECENT POSITION

Organization name and address	Dates of employment	Title	Immediate supervisor, name, title and phone number

Provide a brief description of your job responsibilities in the space below:

NEXT MOST RECENT POSITION

Organization name and address	Dates of employment	Title	Immediate supervisor, name, title and phone number

Provide a brief description of your job responsibilities in the space below:

EDUCATION

List all institutions attended starting with the most recent (Transcripts are not required with this application).

Institution's name and address	When attended	Major(s)	Degree received and date
	From: To:		
	From: To:		
	From: To:		
	From: To:		

CONTINUING EDUCATION

List the continuing education programs you have participated in during the past five years. Include all facility management-related seminars, workshops, conferences, etc.

Program provider and address	Program/course title	Date

REFERENCES

List three professional references. One must be your current or most recent supervisor or client if you are a consultant. The others can be former supervisors, current colleagues, subordinates or professional peers. Letters of verification are needed from each reference. This must be submitted to IFMA. You can use standard mail, fax or scan them in and attach them to your application. **No application will be processed without these letters.**

Name	Title	Organization	Address and phone number

In the space below, describe why you want to become a certified facility manager and how your background qualifies you for this distinction.

CODE OF CONDUCT/RULES AND REGULATIONS

1. My primary goal will be to develop and manage safe, humane and functional workspaces.
2. I shall integrate the needs of management with the needs of people in the workplace to develop and manage humane and effective work environments.
3. I shall maintain objective and professional judgments. I shall not compromise this judgment by undertaking any activity, accepting any contributions or having any conflicts of interest that would prevent me from acting in the best interest of my employer, clients or employees.
4. I shall practice in a manner that supports the rights of employers, employees and clients, and shall not discriminate because of race, sex, creed, age or national origin.
5. I shall continue to seek new information and enhance my professional skills relative to the design, construction, maintenance and management of the physical environment as it relates to people and work processes.

In addition I certify that:

1. All information provided by me in this application is complete and accurate to the best of my knowledge.
2. Any additional information that may be needed to process this application will be supplied by me upon request.
3. I will not claim to be a certified facility manager until this designation is awarded to me nor will I continue to use the designation if I do not renew it according to standard maintenance procedures.

I hereby apply to become a candidate for certification as a facility manager by the International Facility Management Association. As a condition of this application, I authorize IFMA to investigate statements made within this application.

Name:

Date:

INTERNATIONAL FACILITY MANAGEMENT ASSOCIATION

1 EAST GREENWAY PLAZA, SUITE 1100, HOUSTON, TEXAS, 77046-0194

EXPERIENCE ASSESSMENT FORM

PURPOSE

The Certification for Facility Managers Program is based on real life experience. The questions on the exam were written by experienced facility managers and cover all of the competency areas that are presented in this form. To be considered for equivalency-based certification you need to demonstrate experience in all nine of the competency areas.

Therefore this form is divided into nine sections – one that covers each competency area.

DIRECTIONS

1. Read each response area/question carefully. Think about your experience and if you have ever managed, done, consulted, taught, written about or given a conference presentation related to the function or activity in question. If you have not, write “No” in the block. If you have experience, describe it.

The examples you give should not be vague statements like, "As facility manager at a bank part of my responsibilities include purchasing new furniture." Instead, give specific examples that include, when appropriate, information like: size, square feet, budget or dollar amount, number of employees, etc. Also, your examples should illustrate the highest level at which you have done each task. See the sample responses on the following pages for more information.

Answers do not need to be limited to the space in the current blocks on this form. Completely type out your answer. Please remember that a panel of CFMs who do not know you will evaluate your completed application. It is important you supply enough detail for them to fairly and completely evaluate your experience.

3. When the form is complete, make a copy for your files and return one copy to IFMA along with the application.

SAMPLE ANSWERS

SECTION ONE -- OPERATIONS & MAINTENANCE

Competency Area: OPERATIONS & MAINTENANCE

3. The following assesses activities involving the furniture needs of a facility. Explain why you think you can perform these activities. Then give responses to illustrate why you think you can handle each related task listed below.

If you have not performed any of these tasks write "No" in the response block.

Personal Examples

As facility manager for a bank with 20 branch locations and a corporate headquarters of 60,000 square feet, part of my general duties include the purchase and disposal of furniture. Recently I was responsible for purchasing over \$700,000 worth of furniture used in three branch lobbies and furniture for 22 private offices, 45 workstations and 10 meeting rooms at the corporate headquarters. Approximately 80 people use this furniture daily. The lobbies are about 2,500 square feet each and the corporate space furnished totaled 25,000 square feet.

3a. Assessed furniture needs.

Personal Examples

To plan for the furniture purchase described above, I held meetings with the head of branch operations to discuss needs of clients in the branches. I also worked with division managers at the corporate headquarters to familiarize them with the office building standards. We adapted the appropriate standards to the job functions.

3b. Acquired furniture.

Personal Examples

Once the type and amount of furniture to be purchased was established, I put together an RFP and sent to three vendors. After the vendor was selected I prepared the furniture order, secured the appropriate approvals and issued the requisition.

3c. Installed furniture.

Personal Examples

I personally supervised the installation of this furniture both at the branches and the corporate space. I received the furniture and checked it in at the branch locations. At the corporate space, I worked with the dealership to supervise the installation crew of 10 people. I also engaged three in-house maintenance personnel on the day of installation to assist in furniture set up.

3d. Disposed of furniture.

Personal Examples

As older furniture is replaced, I work with the fixed asset department to determine the remaining book value of excess furniture. I receive bids from three liquidators to dispose of the excess furniture. In the branches, the furniture with no remaining value is donated to worthwhile community causes. I work with public relations to prepare an article for the local newspaper noting the bank's donation.

3e. Evaluated furniture/user performance

Personal Examples

Prior to purchasing the furniture for the corporate performance location, I observed 20 people at work in jobs covering different functions. I verified that the defined furniture standards would meet their needs and wrote recommendations for changes as appropriate. After the installation, I had a representative from the furniture dealer on site for one day to familiarize the employees with the new workstations. I also incorporated a critique of the furniture in the post occupancy evaluation issued three months after the occupancy date.

EXPERIENCE ASSESSMENT FORM

Name

Date

SECTION ONE -- OPERATIONS & MAINTENANCE

Competency Area: OPERATIONS & MAINTENANCE

<p>1. <i>The following assesses functions involving building systems (HVAC, electrical, water, waste, etc.). Give specific responses from your experience that illustrate how you have handled each task listed below. If you have not performed any of these tasks, write "No" in the block.</i></p>
<p>1a. Assess a facility's need for building systems?</p>
<p>1b. Recommend building systems?</p>
<p>1c. Acquire building systems?</p>
<p>1d. Install building systems?</p>
<p>1e. Operate building systems?</p>
<p>1f. Maintain building systems (i.e., perform preventive, predictive, or corrective maintenance)?</p>
<p>1g. Dispose of building systems?</p>

1h. Evaluate how well building systems perform?
1i. Develop emergency procedures to handle building system failures?
2. <i>The following assesses maintenance of building structures and interiors. Give specific responses from your experience that illustrate how you have handled each task listed below. If you have not performed any of these tasks, write "No" in the block.</i>
2a. Evaluate building structures and permanent interior elements?
2b. Maintain building structures and permanent interior elements?
3. <i>The following assesses activities involving the furniture needs of a facility. Give specific responses from your experience that illustrate how you have handled each task listed below. If you have not performed any of these tasks, write "No" in the block.</i>
3a. Assess furniture needs?
3b. Acquire furniture?
3c. Install furniture?
3d. Dispose of furniture?

3e. Evaluate furniture/user performance?
4. <i>The following assesses activities involving the equipment needs of a facility. Give specific responses from your experience that illustrate how you have handled each task listed below. If you have not performed any of these tasks, write "No" in the block.</i>
4a. Assess equipment needs?
4b. Acquire equipment?
4c. Install equipment?
4d. Dispose of equipment?
4e. Operate equipment?
4f. Evaluate equipment performance?
5. <i>The following assesses activities involving the grounds and exterior element needs of a facility. (Landscaping, security systems, parking lots/garages, lighting, etc.). Give specific responses from your experience that illustrate how you have handled each task listed below. If you have not performed any of these tasks, write "No" in the block.</i>
5a. Acquire grounds and exterior elements?

5b. Install grounds and exterior elements?

5c. Operate grounds and exterior elements (systems)?

5d. Assess the effect of climatic and environmental conditions on grounds and exterior elements?

5e. Assess the need for alterations to grounds and exterior elements?

5f. Evaluate the performance of grounds and exterior elements?

SECTION TWO REAL ESTATE

Competency Area: REAL ESTATE

6. *The following assesses functions involving the real estate master planning process. Give specific responses from your experience that illustrate how you have handled each task listed below. If you have not performed any of these tasks, write "No" in the block.*

6a. Develop and implement a real estate master plan?

6b. Maintain the real estate master plan?

6c. Recommend actions on real estate master plan options and alternatives?

7. *This section assesses functions involving real estate assets. Give specific responses from your experience that illustrate how you have handled each task listed below. If you have not performed any of these tasks, write "No" in the block.*

7a. Acquire company leased and owned property?

7b. Dispose of company leased and owned property?

7c. Recommend actions on real estate development decisions?

7d. Perform highest and best use studies?

7e. Evaluate the effects of economic change on real estate assets?
7f. Evaluate the effects of proposed real estate changes on different business units?
7g. Maintain the real estate lease portfolio?
7h. Maintain real estate documents?
7i. Inventory, track, and report real estate assets?
7j. Manage development support services for other functions?

SECTION THREE -- HUMAN & ENVIRONMENTAL FACTORS

Competency Area: HUMAN & ENVIRONMENTAL FACTORS

8. *The following assesses activities that promote and protect the health of everyone who uses or visits the facility. Give specific responses from your experience that illustrate how you have handled each task listed below. If you have not performed any of these tasks, write "No" as your response.*

8a. Assure the safety of everyone who uses or visits the facility?

8b. Assure the security of everyone who uses or visits the facility?

8c. Enhance the quality of work life of everyone who uses the facility?

8d. Enhance the environment inside and outside the facility?

8e. Evaluate the facility's support of organizational effectiveness?

8f. Monitor changes in laws and regulations affecting the facility, its users, and visitors?

8g. Monitor changes in the Facility Function (your department) and its services?

8h. Monitor changes in the people who use and visit the facility?
8i. Assure the facility and its operations comply with laws and regulations?
8j. Monitor information and trends about human and environmental concerns?
8k. Provide training to maintain safe and effective use of the facility?
8l. Conduct due diligence studies?
9. <i>The following assesses activities involving emergency preparedness activities. Give specific responses from your experience that illustrate how you have handled each task listed below. If you have not performed any of these tasks, write "No" as your response.</i>
9a. Develop emergency plans?
9b. Assure people are trained in emergency procedures?
9c. Test emergency systems and procedures?
9d. Conduct emergency drills?
9e. Develop disaster recovery plans?

SECTION FOUR -- PLANNING & PROJECT MANAGEMENT

Competency Area: PLANNING & PROJECT MANAGEMENT

<p>10. <i>The following assesses functions involving the development of facility plans. Give specific responses from your experience that illustrate how you have handled each task listed below. If you have not performed any of these tasks, write "No" as your response.</i></p>
<p>10a. Interpret overall business goals and corporate strategies used to accomplish those goals?</p>
<p>10b. Develop long, interim, and short-term facility plans?</p>
<p>10c. Maintain long, interim, and short-term facility plans?</p>
<p>10d. Evaluate long, interim, and short-term facility plans?</p>
<p>11. <i>The following assesses functions involved in the planning and managing of projects. Give specific responses from your experience that illustrate how you have handled each task listed below. If you have not performed any of these tasks, write "No" as your response.</i></p>
<p>11a. Define the scope of projects?</p>
<p>11b. Identify project teams?</p>
<p>11c. Develop project plans?</p>

11d. Generate alternative strategies for projects?
11e. Identify resources needed to complete projects?
11f. Secure the resources needed for projects?
11g. Develop bid specifications?
11h. Develop and coordinate the approval process requirements of projects?
11i. Coordinate the tasks of projects?
11j. Evaluate the results of projects?
12. <i>The following assesses functions involving the management of programs. Give specific responses from your experience that illustrate how you have handled each task listed below. If you have not performed any of these tasks, write "No" as your response.</i>
12a. Manage the programming phase of projects?
12b. Evaluate the adequacy of the program?
13. <i>The following assesses functions regarding the management of designs. Give specific responses from your experience that illustrate how you have handled each task listed below. If you have not performed any of these tasks, write "No" as your response.</i>

13a. Manage the design phase of projects?
13b. Evaluate the design?
<i>14. The following assesses functions relating to the management of construction projects. Give specific responses from your experience that illustrate how you have handled each task listed below. If you have not performed any of these tasks, write "No" as your response.</i>
14a. Manage construction projects?
14b. Evaluate how well construction projects met business needs?
<i>15. The following assesses functions relating to the management of relocations. Give specific responses from your experience that illustrate how you have handled each task listed below. If you have not performed any of these tasks, write "No" as your response.</i>
15a. Manage relocation projects?
15b. Evaluate how well moves were performed?

SECTION FIVE – LEADERSHIP AND MANAGEMENT

Competency Area: LEADERSHIP AND MANAGEMENT

<p>16. <i>The following assesses functions involving the Leadership and Management of your department. Give specific responses from your experience that illustrate how you have handled each task listed below. If you have not performed any of these tasks, write "No" as your response.</i></p>
<p>16a. Create a mission for your department?</p>
<p>16b. Assess business trends?</p>
<p>16c. Plan department activities?</p>
<p>16d. Organize your department?</p>
<p>17. <i>The following assesses activities involved in managing assigned personnel. Give specific responses from your experience that illustrate how you have handled each task listed below. If you have not performed any of these tasks, write "No" as your response.</i></p>
<p>17a. Plan staffing needs and requirements?</p>
<p>17b. Coordinate personnel assignments?</p>
<p>17c. Coordinate work performed as contract services?</p>

17d. Evaluate worker performance?
17e. Support personnel development?
17f. Provide leadership to assigned staff?
18. <i>The following assesses activities involved in the management of the facility. Give specific responses from your experience that illustrate how you have handled each task listed below. If you have not performed any of these tasks, write "No" as your response.</i>
18a. Administer policies, procedures, and practices for the facility?
18b. Administer the acquisition of material resources for the facility?
18c. Administer the distribution of material resources for the facility?
18d. Administer the use of material resources for the facility?
18e. Maintain documentation systems for the facility?
19. <i>The following assesses activities involved in the delivery of services. Give specific responses from your experience that illustrate how you have handled each task listed below. If you have not performed any of these tasks, write "No" as your response.</i>

19a. Plan for the delivery of facility services?

19b. Assure services were delivered?

19c. Evaluate service delivery?

SECTION SIX FINANCE

Competency Area: FINANCE

20. The following assesses activities involving the finances of the facility. Give specific responses from your experience that illustrate how you have handled each task listed below. If you have not performed any of these tasks, write "No" as your response.

20a. Analyze financial information

20b. Monitor charge back systems?

20c. Prepare budgets?

20d. Manage the budget?

20e. Monitor revenues and expenditures to contain costs?

20f. Manage the financial obligations of the Facility Function?

SECTION SEVEN -- QUALITY ASSESSMENT & INNOVATION

Competency Area: QUALITY ASSESSMENT & INNOVATION

<p><i>21. The following assesses activities involving the quality of facility services and the facility's effectiveness. Give specific responses from your experience that illustrate how you have handled each task listed below. If you have not performed any of these tasks, write "No" as your response.</i></p>
<p>21a. Conduct surveys of customers?</p>
<p>21b. Assure quality processes are documented?</p>
<p>21c. Select methods to collect data?</p>
<p>21d. Analyze data?</p>
<p>21e. Improve the facility and service delivery processes?</p>
<p>21f. Monitor and promote the quality process?</p>

<p>22. <i>The following assesses activities involving the benchmarking process. Give specific responses from your experience that illustrate how you have handled each task listed below. If you have not performed any of these tasks, write "No" as your response.</i></p>
<p>22a. Establish benchmarks?</p>
<p>22b. Determine the potential for improving facility performance?</p>
<p>22c. Integrate benchmark findings into the Facility Function and business goals?</p>
<p>23. <i>The following assesses functions involving managing audit (governmental and corporate) activities. Give specific responses from your experience that illustrate how you have handled each task listed below. If you have not performed any of these tasks, write "No" as your response.</i></p>
<p>23a. Comply with laws and regulations?</p>
<p>23b. Conduct internal audits of the facility?</p>
<p>23c. Conduct mandatory audits as required by regulation?</p>
<p>24. <i>The following assesses activities involving the recommendation of innovative improvements. Give specific responses from your experience that illustrate how you have handled each task listed below. If you have not performed any of these tasks, write "No" as your response.</i></p>
<p>24a. Investigate ways to improve facility services?</p>

24b. Assess risks of, and opportunities for, improving the facility and facility services?

24c. Conduct pilot tests when new procedures were/are being developed?

SECTION EIGHT - COMMUNICATION

Competency Area: Communication

25. *The following assesses activities involved with recommending policies. Give specific responses from your experience that illustrate how you have handled each task listed below. If you have not performed any of these tasks, write "No" as your response.*

25a. Building systems policies?

25b. Furniture policies?

25c. Equipment policies?

25d. Grounds and exterior elements policies?

26. *The following assesses activities involving the establishment of standards. Give specific responses from your experience that illustrate how you have handled each task listed below. If you have not performed any of these tasks, write "No" as your response.*

26a. Standards to maintain or improve building systems?

26b. Standards to maintain or improve furniture?

26c. Standards to maintain or improve equipment?

26d. Standards to maintain or improve grounds and exterior elements?

26e. Standards to maintain or improve the quality of facility services and the facility's effectiveness?
<i>27. The following assesses activities involving the establishment of work practices and procedures. Give specific responses from your experience that illustrate how you have handled each task listed below. If you have not performed any of these tasks, write "No" as your response.</i>
27a. Building systems work practices and procedures?
27b. How have you improved the effectiveness of meetings with your supervisees?
27c. What are the most important communication strategies you employ to communicate with your superiors (or with your supervisees)?
27d. How do you use communication technologies to network with your peers in other corporate departments?
27e. How have you used your negotiation skills to reduce the cost of services or improve the quality of services to your company?
<i>28. The following assesses the types of information you can use. Give specific responses from your experience that illustrate how you have handled each task listed below. If you have not performed any of these tasks, write "No" as your response.</i>
28a. What are the characteristics of excellent written communication with those above you in the chain of command?
28b. Give an example of how you used graphic information to explain difficult concepts to others in your department.
28c. If you were given the opportunity to speak in public to your FM peers, what subject would you choose?

28d. What points would you highlight in your speech?

SECTION NINE -- TECHNOLOGY

Competency Area: Technology

29. <i>The following assesses functions involving the facility manager's ability to assess and predict future requirements for the Facility Management Department's overall informational technology strategy; acquiring, implementing and maintaining systems; and deploying assets and disposing of technologies as required.</i>
29a. Plan and evaluate Facility Management Department's technologies?
29b. Acquire and implement facility management technologies?
29c. Operate and maintain facility management technologies?
29d. Evaluate and optimize facility management technologies performances including contingency planning?
30. <i>The following assesses the pivotal role of the facility manager in the strategic development, implementation and maintenance of the organization's informational technology systems which are a critical part of the organization's infrastructure technology.</i>
30a. Plan for and evaluate the organization's infrastructure technology?
30b. Contribute the facility management perspective and identify the long term impact to the organization's infrastructure technology?
30c. Support the acquisition and implementation of the organization's infrastructure technology?
30d. Support the operation and maintenance of the organization's infrastructure technology?

30e. Support the changing of the organization's infrastructure technology requirements?

30f. Manage or participate in testing and implementing emergency procedures and disaster recovery plans?

Return the completed application to: certification@ifma.org.

The three required letters of verification can be mailed to IFMA Certification, 1 E. Greenway Plaza, Suite 1100, Houston, TX 77046 USA, faxed to IFMA Certification at 713-623-6124 or scanned and attached to this application. All letters must be received in order for the application to be processed.

Payment should be made via credit card. Simply complete the following section with your credit card information:

Type of Card (Visa, MasterCard, etc.):

Card Number:

Expiration Date:

Name on Credit Card:

Check the amount you are authorizing IFMA to charge to the card:

As an IFMA member, I authorize a \$525 application review fee be charged to the above card.

As a Non-IFMA member, I authorize a \$775 application review fee be charged to the above credit card.

THANK YOU