



444 North Capitol St. NW; #645  
Washington, DC USA

## APPLICATION FOR CANDIDACY As A Certified Marina Manager

Page 1 of 9

*Please type all information*

*For Institute Use Only*

Date Received \_\_\_\_\_

IMI Member: *Yes*\_\_ *No*\_\_

Answers Complete: *Yes*\_\_ *No*\_\_

**Biographical Information**

- |   |   |
|---|---|
| <p>1. Applicant Name</p> <p>2. Marina Name</p> <p>3. Position in Marina/Title</p> <p>4. Business Address</p> <p>5. City/State(Prov.)/Zip/Country</p> <p>6. Telephone: Business [6a], Home [6b], Fax [6c]</p> <p>6a. Business _____, 6b. Home _____, 6c. Fax _____</p> | <p>7. AMI Membership: __ Marina, __ Individual, __ Other (<i>explain</i>)</p> <p>8. E-Mail Address:</p> <p>9. Date of Application</p> <p>10. Residence Address</p> <p>11. City/State(Prov.)/Zip/Country</p> <p>12. Social Security Number</p> <p>13. Date of Birth</p> <p>14. Place of Birth (City, State)</p> <p>15. Citizenship</p> |
|---|---|

**16. Employment History:** List the names and address of your marina employers for the past 10 years, most recent first. ***Include with this application a letter from each marina employer under whom you worked, verifying your experience and dates of employment.***

- |   |  |
|---|--|
| <p>16.1 Marina Name</p> <p>Marina Address</p> <p>City/State/Zip</p> | <p>Position Title/Responsibilities</p> <p>Dates Employed: From:                      To:</p> <p>Name of Employer</p> |
| <p>16.2 Marina Name</p> <p>Marina Address</p> <p>City/State/Zip</p> | <p>Position Title/Responsibilities</p> <p>Dates Employed: From:                      To:</p> <p>Name of Employer</p> |
| <p>16.3 Marina Name</p> <p>Marina Address</p> <p>City/State/Zip</p> | <p>Position Title/Responsibilities</p> <p>Dates Employed: From:                      To:</p> <p>Name of Employer</p> |
| <p>16.4 Marina Name</p> <p>Marina Address</p> <p>City/State/Zip</p> | <p>Position Title/Responsibilities</p> <p>Dates Employed: From:                      To:</p> <p>Name of Employer</p> |
| <p>16.5 Marina Name</p> <p>Marina Address</p> <p>City/State/Zip</p> | <p>Position Title/Responsibilities</p> <p>Dates Employed: From:                      To:</p> <p>Name of Employer</p> |

**17. Marine Association Membership:** As a CMM candidate, you will be required to be an **active** member of a local or regional Marine Association, or if none is available in your area be an active member of another local professional organization. ***Please attach a separate sheet*** indicating your marine association full name (not initials), executive secretary or top officer's name, telephone & fax numbers, and address; describe what office, if any, you hold now and in the past, committee services, awards, projects you completed, etc. You may also add any other civic and professional organizations you are involved with, leadership roles, awards, etc., on the same separate sheet.

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**18. Education:** Documentation (i.e. photocopies) must be submitted with this form for all diplomas, degrees or courses listed to receive credit for them.  
 (Also note on item 18.6 below regarding submission of college transcripts)

**18.1 High School Graduate:** City/State Year Graduated  
 Name:

**18.1a High School Equivalency Certificate:** City/State Date Obtained  
 Issued by:

**18.2 Undergraduate College or University:** City/State Years Attended: From: To:  
 Name: Degree Received Date Degree Conferred  
 Major Field of Study

**18.3 Graduate College or University:** City/State Years Attended: From: To:  
 Name: Degree Received Date Degree Conferred  
 Major Field of Study

**18.4 List International Marina Institute seminars or training courses that you have attended.** (Use additional sheet if necessary.)

Seminar	Location	Date
1.		
2.		
3.		
4.		

**18.5 List other marina seminars that you have attended** (Enclose documentation of your attendance. Use additional sheet if necessary.)

Seminar Sponsor	Seminar Name	City/Sate	Date Taken
1.			
2.			
3.			
4.			

**18.6 College/Correspondence Courses:**  
 Circle the College-Level Courses which you have completed with a passing grade in the following list. Please indicate with an "X" on the line following the course name, those courses for which you can supply a certificate or transcript as evidence of completion.

Name of Course	Certificate/Transcript Available?	Name of Course	Certificate/Transcript Available?
Accounting	_____	Organizational Behavior	_____
Finance	_____	Business Writing	_____
Computer	_____	Composition	_____
Information Sciences	_____	Psychology	_____
Mathematics	_____	Law	_____
Statistics	_____	Taxation	_____
Quantitative Analysis	_____	Sociology	_____
Economics	_____	General Management	_____
Marketing	_____	Business	_____
Human Resources	_____	Environmental Studies	_____
Personnel Management	_____	Engineering (specify type)	_____
Labor Relations	_____		

Comments (if any):

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**Other Information:**

19. Have you ever been involved in a reorganization for the benefit of creditors, or in bankruptcy proceedings as a debtor?  
                                   *Yes*                                    *No*                                    *If yes, please attach a detailed explanation*
20. Have you ever been involved in either civil or criminal legal proceedings as a defendant in which there were allegations of fraud, misrepresentation, misappropriation of funds or property, etc:  
                                   *Yes*                                    *No*                                    *If yes, please attach a detailed explanation*
21. Have you ever been subject to disciplinary action by any other professional organization?  
                                   *Yes*                                    *No*                                    *If yes, please attach a detailed explanation*

22. **References:** Six letters of recommendation are required and must be submitted with this application in the envelopes provided. See application instructions as to whom these references may be and how they are to be submitted.

<u>Name &amp; Affiliation of Reference</u>	<u>IMI Member?</u>
22.1 _____	<i>Yes No</i>
22.2 _____	<i>Yes No</i>
22.3 _____	<i>Yes No</i>
22.4 _____	<i>Yes No</i>
22.5 _____	<i>Yes No</i>
22.6 _____	<i>Yes No</i>

**Please read these rules and regulations before signing application on Page 4:**

23. As part of my CMM application to the Association of Marina Industries (AMI), **I agree and understand that:**

23.1 All of the information provided by me is complete and correct to the best of my knowledge and belief. If I made, or at any time make any statement with knowledge of its falsity, I understand that it shall be cause for denial of candidacy, candidate status, or membership in the Institute.

23.2 All additional information that may be needed by AMI shall be supplied by me upon request.

23.4 I wholeheartedly subscribe to the following principles of the Association of Marina Industries (AMI) :

To dedicate myself to the advancement of professional marina management through the mutual efforts of fellow CMM and all members of AMI, and to promote the continued education and activity of myself and others in the marina industry by any proper means available to me.

To conduct all of my business dealings in compliance with all laws, and with honesty, integrity, and industriousness above all else; and to improve the quality of service and enjoyment of the boating experience for my customers.

23.5 I shall not hold myself out to anyone as being a candidate for, or as being a, CMM until such time as I may become so designated in writing.

23.6 I agree that the Institute may censure, suspend, or expel or otherwise terminate this candidacy or certification, if granted, in accordance with AMI's CMM regulations, and item 23.1 above, and that AMI, its officers,

members, employees, and agents may disclose its actions, in full or part, to the members of AMI and the general public.

23.7 I will pay annual dues and fees (if any) as set by AMI.

23.8 I hereby authorize AMI to obtain credit and other similar information on or about me, and its officers, members, employees, and agents may use such information in evaluating this application.

23.9 I can remain a candidate for a maximum of two years from the date my candidacy is approved. If I do not fulfill the requirements for CMM within two years from the date my candidacy is approved, I can no longer remain a candidate and a new application must be submitted.

23.10 I understand that a regional member of the CMM certification board, AMI or the local Marine Association (or, if there is none, some other AMI-designated representative) will be engaged to verify all information herein provided.

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**24. Verification of Information**

24.1 Signature of **applicant**, verifying the accuracy of the information on this application and the experience credit form and acknowledging having read the rules and regulations stated above, and will comply with them.

X \_\_\_\_\_ Date \_\_\_\_\_

24.2 Signature of **employer**, verifying the accuracy of the information on this application and the experience credit form as to the applicant's current responsibilities. (If the applicant is the owner/employer in the business of the applicant, please write "Same as Applicant," on the signature line below.)

Employer Name (print or type) \_\_\_\_\_  
Position in Marina \_\_\_\_\_ Signature: \_\_\_\_\_

\_\_\_\_\_ X \_\_\_\_\_ Date \_\_\_\_\_

**AFFIDAVIT**

I affirm that **this information is correct and complete** as of the date this affidavit is signed, and that the International Marina Institute is authorized to review and verify all information listed on my CMM Candidate Application.

I further understand that **if I change employment positions** at any time during my candidacy, I shall be required to notify IMI, and to provide information about my termination and new employment position.

Signature \_\_\_\_\_  
Print Name \_\_\_\_\_  
Title \_\_\_\_\_  
Marina \_\_\_\_\_

STATE/PROVINCE OF: \_\_\_\_\_

COUNTY OF: \_\_\_\_\_

Sworn to and subscribed before me this \_\_\_\_\_ day of \_\_\_\_\_, A.D., 20\_\_\_\_\_.

\_\_\_\_\_  
Notary Public

State/Province of \_\_\_\_\_

My commission expires \_\_\_\_\_

Applicant Name

**CANDIDATE EXPERIENCE**  
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**EXPERIENCE CREDIT FORM: Part One: Portfolio Information**

**Instructions:** Indicate your management experience in each area below, beginning with column 1 list your current (most recent) experience. (The left-hand column is provided as an example.) The dates at the top of the columns should represent each marina job, and relate to the Employment History given Item 16, page 1 of 8. Use extra sheet if necessary. Leave blank items that don't apply.

<i>Please type all information</i>	<b>Example:</b> 6-89 to 12-92	1: From _____ to _____	2: From _____ to _____	3: From _____ to _____	4: From _____ to _____	5: From _____ to _____
------------------------------------	--	---------------------------------	---------------------------------	---------------------------------	---------------------------------	---------------------------------

1. Indicate marinas where you have had **primary management responsibilities**. Indicate storage capacity by number of slips, dry storage, etc.

<b>MARINA NAME:</b>	Gull Point, Inc.					
a. Wet Slips	98					
b. Dry Stack Slots	150					
c. Dry Land Storage	25					
d. Moorings	0					
<b>Total Boats</b>	<b>273</b>					

2. Give approximate **gross annual income** of these activities in thousands of dollars.

a. Wet Slips	\$180					
b. Dry Storage Slots	\$250					
c. Dry Land Storage	\$ 30					
d. Moorings						
e. Fuel	\$105					
f. Marine Store	\$ 83					
g. Boat Repairs/Services	\$ 26					
h. Boat Sales						
i. Boat Rentals						
j. Dockominium Mgmt.						
k. Retail Space Rental						
l. Office/space Rental	\$ 48					
m. Restaurant Income/Rental	\$ 60					
n. Industrial/Other Income						
o. RV Park/Campgrounds						
TOTAL of 2.a thru 2.o.:	\$782					

3. What **proportion of your time** during a 40-hour work week is/was spent in relation to:

a. Financial Planning?	10%	%	%	%	%	%
b. Marketing, Sales & Customer Relations?	20%	%	%	%	%	%
c. Equipment Operation?	15%	%	%	%	%	%
d. Staff Administration?	30%	%	%	%	%	%
e. Paperwork?	20%	%	%	%	%	%
f. Service to boats/engines?	5%	%	%	%	%	%

4. Months worked as **General Manager**, or **reporting directly** to a General Manager?

	17					
--	----	--	--	--	--	--

5. How many **employees** do/did you supervise in this position?

	18					
--	----	--	--	--	--	--

*For AMI Use Only*  
*Effective Experience Totals*

Applicant Name

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**EXPERIENCE CREDIT FORM: Part Two: Management Experience**

**Instructions:** Indicate your marina management experience by placing an "X" in the boxes below that accurately reflect your duties and responsibilities and your level of authority. Evaluate each function as it applies to the marina or marinas you have managed.

*The 14 functions on this page* are those typically associated with a marina manager. Most asset managers do perform some of these functions, and, likewise, most marina managers perform some asset manager functions. Study the functions carefully and check only those for which you are or were accountable. The time periods must coincide with responses to Item 16, on page 1 of 8.

Begin with column 1 and conclude with your most recent experience. (The left-hand column is provided as an example.) **The dates at the top of the columns should correspond with those on Part One of the Experience Credit Form** (page 5 of the application).

Marina Management Functions	1: From	2: From	3: From	4: From	5: From
	to	to	to	to	to
1. Routinely manage on-site personnel either directly or through others, including hiring and firing authority.					
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.					
3. Regularly direct employees or contractors who perform maintenance and repair work, judging work performance adherence to specifications, and observance of safety regulations.					
4. Conduct scheduled on-site inspections at least monthly using inspection checklists.					
5. Meet routinely and personally with marina occupants on management matters.					
6. Establish or monitor and enforce operating policies and procedures, such as working hours, training procedures, and accountability for equipment.					
7. Have authority to authorize any single expense of \$500 or more.					
8. Supervise the monitoring of receipts, journal entries, records of account, bank deposits, and collection of unpaid or slow-paying accounts.					
9. Supervise the process of boat storage renting and lease renewal.					
10. Prepare annual budgets, including capital expenditure budgets, or review and authorize such budgets prepared by subordinates.					
11. Review and approve monthly operating statements, together with any explanatory text required, and submit to owner(s).					
12. Authorize or establish a marina record-keeping system or supervise and control the maintenance of an existing system of business records.					
13. Prepare marketing plans, including selection of media, format and amount of advertising.					
14. Determine insurable risks, and based on familiarity with customary coverages, recommend coverages to owners.					
<b>For AMI Use Only</b> <i>Total Marina Mngt. Funtions Performed</i>					

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**EXPERIENCE CREDIT FORM: Part Two: Management Experience** (continued)

*The 12 functions on this page* are those typically associated with a marina property. Study the functions carefully and check only those for which you are or were accountable. Not every marina manager will have all of these experiences.

Begin with column 1 and conclude with your most recent experience. *(The left-hand column is provided as an example.)* **The dates at the top of each column should correspond with those on Part One of the Experience Credit Form** (page 5 of the application).

<b>MARINA ASSET MANAGEMENT FUNCTIONS</b>	1: From _____ to _____	2: From _____ to _____	3: From _____ to _____	4: From _____ to _____	5: From _____ to _____
<b>MARINA NAME:</b>					
15. Determine the rates to be charged and authorize deviations from this rate in appropriate cases.					
16. Manage with full authority.					
17. Analyze and review financial requirements with owner(s) and, when appropriate, recommend alternate sources of funds.					
18. Advise owner(s) of the need to consult legal counsel based on management knowledge, familiarity with applicable laws and statutes, and possible legal and tax implications of specific actions.					
19. Review and advise owners of estimates of value, and assess the implications these estimates have in comparison to similar marinas; determine reasonableness of assessed and insurable value.					
20. Identify and analyze uses of the property, and implement a plan to change a property's use, or approve such a plan (e.g., converting a marina to ship repair).					
21. Identify, analyze, and implement, or approve, major maintenance or remodeling programs.					
22. Approve major variances from the budget, exclusive of emergencies.					
23. Have primary responsibility for compliance with government regulations.					
24. Helped prepare/present permit application, and/or environmental impact information.					
25. Authorize the establishment of, or approve controls for, management information systems (e.g., accounting systems).					
26. Analyze and approve submissions for financing based upon a working knowledge of packaging and analyzing loan submittals.					
<b>For AMI Use Only:</b>					
<b>Total Asset Functions Performed:</b>					
<b>Total Functions Performed:</b>					
<b>Comments:</b>					

## CANDIDATE EXPERIENCE

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#### REQUIRED SUPPORTING DOCUMENTATION:

In addition to the documentation required to be submitted by Items Number 16, 17, 18, 19, 20 and 21 above, the following supporting documentation is also required to be submitted along with this application:

**Marina Organization Chart:** Show the organizational structure of the marina(s) managed, include job titles, and the names of the people reporting to you, and to whom you report. Include also a copy of the most recent employment report submitted to your state or provincial department of labor or employment, which identifies by name the individuals employed at your marina.

**Photographs (in electronic format):** Three (3) copies of each of the following: All berths, wet and dry, aerial photo if available, also 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, samples of typical advertising for the marina(s).

**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 Institute's offices. It will be reviewed only for verification and clarification of the Candidate Experience portion of the Application, and not forwarded to the CMM Review Committee.

#### EMPLOYMENT NARRATIVE REPORT: *Please submit typewritten report on separate sheet(s).*

**Instructions:** In your own words, write an employment narrative report for each period of time covered by your Experience Credit Form (on page 5 of 8, columns 1 through 5, and for any additional periods you may have listed on additional sheets).

Describe your marina job responsibilities and management experience, Do not provide a resumé 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 in the company, as well as experiences.

Please see page 14 of the CMM Applicant's Handbook for additional instructions on the Employment Narrative Report(s).

Please include the following heading on **each** of the period narrative reports:

For period from \_\_\_\_\_ to \_\_\_\_\_

Your Title

Employer

Title of Immediate Supervisor

Titles of Positions Reporting Directly to You

## REGIONAL FACILITIES

### Comparative Operational Information

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### COMPARABLY-SIZED FACILITY INFORMATION:

Instructions to CMM Applicant: Provide the following information for a minimum of five (5) marina facilities that are of comparable size to yours, located within your geographic region. This information will be used in updating the AMI's database for purposes of evaluating the applicant's qualifications with respect to gross revenue thresholds. Be as thorough as possible in obtaining and assembling this information. Feel free to provide additional relevant information if available. Use extra sheet if necessary and leave blank items that do not apply to a particular facility.

	EXAMPLE	#1	#2	#3	#4	#5
<i>Please Type All Information</i>						
1. MARINA NAME & ADDRESS	Funtown Marina Beachtown, FL					
a. # of Wet Slips	100					
b. # of Dry Stack Slots	150					
c. # of Moorings	25					
d. # of Dry Store Spots	250					
Total Boats:	525					
2. RATE INFO:						
a. Wet slip rates/ft.						
<i>summer season</i>	\$ 65					
<i>winter season</i>	\$ 30					
b. Dry Stack Rates/ft.	\$ 8/ft./mo.					
c. Mooring rate	\$150/season					
d. Dry storage rate/ft.	\$ 3.50/ft./mo.					
3. OPERATIONS						
a. Sell fuel	Y					
<i>If yes, est. # gallons/yr.</i>	150,000					
b. Marine Store	Y					
<i>If yes, est. \$ Sales/yr.</i>	\$25,000					
c. Service/Repairs	Y					
<i>If yes, est. \$ Sales/yr.</i>	\$1.2 million					
d. Boat Rentals	Y					
<i>If yes, est. \$ Rev./yr.</i>	\$20,000					
e. Boat Sales	Y					
<i>If yes, est. \$ Sales/yr.</i>	\$750,000					
f. Restaurants						
<i>If yes, how many</i>	2					
<i>Est. # of seats</i>	125					
<i>Est. \$ Sales/year</i>	\$1.5 million					
<i>Separate Operator?</i>	Y					
g. Office Space leased	Y					
<i>If yes, est. \$ Rev./yr.</i>	\$30,000					
h. Dockminium?	NO					
i. Retail Space leased	Y					
<i>If yes, est. \$ Rev./yr.</i>	\$25,000					
j. RV Park/Campground	Y					
<i>If yes, # of units</i>	25					
<i>If yes, est. \$ Rev./yr.</i>	\$32,000					
k. Industrial/Other use	Y					
<i>If yes, what use?</i>	Swim Club					
l. # of Employees						
<i>Est. in peak season</i>	12					